Human Capital Management

Product Summary

December 10, 2025

workday™

Contents

Human Capital Management

Welcome to the Human Capital Management Administrator Guide, where you can learn how to configure and use product areas such as:

- Human Resource Management
- Employee Experience
- Workforce Management
- Talent Management

To learn more about how to use our documentation, click here or watch the video.

Worker Information

Contact and Personal Information

Active Consent Preferences for Personal Information

Setup Considerations: Active Consent Preferences for Personal Information

You can use this topic to help make decisions when planning your configuration and use of active consent preferences for personal information. 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

Active consent preferences for personal information enable you to collect consent preferences from workers in relation to how you process their personal information.

Business Benefits

- Respect the privacy of an individual's personal information in compliance with global regulations such as the General Data Protection Regulation (GDPR).
- Meet regulatory requirements in countries that require explicit consent to process personal information.
- Promote transparency about data usage in your organization.
- Enable workers to actively manage their consent preferences without manual processes.
- Expand self-identification as a feature in countries that require active consent.

Use Cases

- Obtain explicit consent by country for the use of personal data.
- Control the language of consent.
- Require a consent for a processing purpose if needed to support your business needs.

- View worker consent preferences to ensure you are respecting them.
- Purge data for workers who don't provide consent.

Questions to Consider

Question	Consideration
When you configure active consent for the country of a worker's primary position, do the preferences apply to other countries?	Workers can have active consent preferences in every country where they have a position. Active consents can be different for each country.
Do active consent preferences settings respect your existing localization settings?	Compare available data elements in your active consent and existing localization settings to ensure consistency.
Do you need to collect an active consent for every personal information field?	A single active consent applies to all selected personal information fields.
What happens when you create a new configuration?	Workers must provide their consent again when you create a new configuration because it replaces the previous configuration.
Does Workday provide an audit trail for active consents.	We maintain a history of all active consent configurations.
How do you purge data when a worker has active consents in multiple countries?	For a purge to occur with the new purgeable data types (PDTs), all consent preferences for a processing purpose must be Do Not Consentin all countries. When there's a single consent, Workday doesn't purge.
What's the difference between an acknowledgement and a consent processing type?	An acknowledgement is a check box and isn't considered in a purge. A consentis a prompt that is considered in a purge.
Can terminated workers continue to access their consent preferences?	Consent preferences don't expire so terminated workers who still have access to Workday can manage their consent preference until you: • Turn off active consent for a country. • Create a new configuration. • Purge their consent preferences.

Recommendations

Test data purging in your Sandbox environment before you purge data in you Production environment.

Note: Workday can't reverse or roll back the purged data.

Requirements

No impact.

Limitations

Workday doesn't transfer consent preferences when a candidate becomes a worker.

Tenant Setup

No impact.

Security

These domains in the Active Consent functional area:

Domain	Considerations
Active Consent	Enables you to access report fields and view active consent preferences for a worker.
Self-Service: Active Consent	Enables workers to manage their active consent through: • The initiation of the Change My Personal Information task. • The initiation of the My Task for Change My Personal Informationtask as a part of Onboarding. • The Manage Active Consent Preferences task.
Set Up: Active Consent	Use to configure your active consent processing purposes and active consent preferences by country.

Business Processes

Configure the *Change Personal Information* business process to collect active consent data in the countries where you enable it.

Workers don't have to initiate the *Change Personal Information* business process to manage their active consent preferences.

Reporting

Use the View Active Consent Preferences for Worker report to view active consents.

Integrations

Use the *PUT Active Consent Preferences by Country for Role* web service to import existing consent preferences into a configuration.

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.

Related Information
Examples
24R1 What's New Post: Active Consent Preferences for Personal Information

Steps: Set Up Active Consent Preferences for Personal Information

Prerequisites

Review setup considerations for active consent preferences for personal information.

Review settings you have enabled in the Maintain Localization Settings task.

Context

You can collect consent preferences from workers for how their personal data can be processed. The consent preferences that you configure appear on the Active Consent Preferences page. This provides a safe and transparent experience for workers.

Steps

1. Enable the Active Consent functional area, and configure these domains:
   - *Active Consent*
   - *Self-Service: Active Consent*
   - *Set Up: Active Consent*

   See: Steps: Enable Functional Areas and Security Policies.
2. Access the Maintain Active Consent Processing Purposes task.

   Security: Set Up: Active Consent domain.

   Define and configure processing purposes. Example: DEI Analytics, 3rd party integrations, and Annual Reporting. You can also configure processing types, either Consent or Acknowledgment, and you have the option to make them required.

See next sentence

3. Access the Maintain Active Consent by Country task.

   Security: Set Up: Active Consent domain.

   As you complete the task, consider:

Option	Description
Add	Click to create a new configuration. When you create a new configuration, workers must give their consent again as of the effective date. Workers don't have to give their consent again when you modify an existing configuration.
Copy current configuration	Select when you want to create a new configuration with the same options, but a new effective date.
Effective Date	Select the effective date for the configuration.
Do you want to stop collecting consent for this country?	Select when you create a new configuration and want to stop collecting consent for a country on an effective date.
Custom Consent Statement	Enter a statement to inform your workers about how your organization will process their personal information. Example: You want to provide information about the purpose of active consent. For your statement enter: We will collect, store, and use these categories of personal information about you.
Personal Information Data To Be Processed	From the Personal Information Attributes menu, select the fields that the consent statement applies to.

Option	Description
	For consistency, ensure that you select the same attributes that you enabled on the Maintain Localization Settings task.
Active Consent Processing Purposes	From the Processing Purposes menu, select the processing purposes that you configured. You can select multiple processing purposes. A single consent applies to all personal information fields you've selected for active consent. (Optional) Select the Required check box to require a Consent or an Acknowledgement for any processing purpose. In the Override Processing Purpose Label field, enter custom text that requests consent for the processing purpose. In the Custom Consent Preferences section, define the preferences for consent processing types and map them to the consent values. Example: For Consent, enter text that says: Yes, I'll like that. For Do Not Consent, enter: No thank you. You can also add an Acknowledgment check box in this section. The Custom Consent Preferences option is required to enable report fields and purgeable data types.

4. Create Custom Reports.

   Create custom reports using report fields to view consent preferences or filter personal data.
5. (Optional) Access these tasks:
   - Maintain Custom Labels
   - Maintain Non-English Custom Labels

   Change the Active Consent term to a term that is appropriate for your organization.
6. (Optional) Access the Maintain Active Consent by Country task.

   To enable translation of the Custom Consent Statement in context:
   a) Click the magnifying glass icon next to Active Consent Configuration.
   b) Click the globe icon that appears with the Custom Consent Statement to open the *In-Context Translation* widget.

   Select a language in the translation grid to add translations.
7. (Optional) Access the Translate Business Object task.

   Select business objects to translate and the target language. Workday displays the consent preferences values, label overrides, and processing purpose options in the target language.

Result

Once you configure consent preferences, a person can give consent using these tasks:

- Change Active Consent Preferences.
- Change Personal Information as a subprocess of the *Onboarding* business process.

- Change Personal Information from their profile.

Consent preferences that you configure as required, display with a red asterisk in these tasks.

Next Steps

You can use the PUT Active Consent Preference by Country for Role web service to create or update active consents.

When needed, active consent preferences can be purged using the Person's Active Consent Preferences Purgeable Data Type (PDT).

Use these PDTs to purge personal data when consent isn't given:

- Person's Gender Identity without Active Consent
- Person's Pronoun without Active Consent
- Person's Sexual Orientation without Active Consent

Related Information
Tasks
Steps: Purge Person Data Privacy

Concept: Active Consent Preferences for Personal Information

The Workday Active Consent feature addresses the need for companies to collect explicit consent from their users to process their personal information. You must inform your users of what they’re consenting to and this information must be easy to understand. You have the option to require a consent for a processing purpose that you configure.

In countries that regulate data privacy, active consent directly impacts a company's ability to effectively collect and process personal information.The Workday Active Consent feature uses the requirements of the General Data Protection Regulation (GDPR) law as guidelines for data privacy.

Active consent differs from passive consent, which is consent by silence or omission of information. Passive consent is essentially implied and companies assume that if the data exists, they can use it.

Personal Information

Setup Considerations: Personal Information by Country

You can use this topic to help make decisions when planning your configuration and use of personal information by country. 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 concurrently maintain, view, and report on multiple sets of personal information for a worker that are specific to a country when:

- A person has an international transfer and their active position moves to another country.
- A person has an international assignment and has 2 active positions, 1 in their home country and 1 in their host country.
- A person has additional jobs in multiple countries.

In addition, you can maintain, view, and report on country-based personal information for a person who was considered for a position as a pre-hire.

Business Benefits

- You can more easily manage personal information for countries in which a person currently has or had a position and for countries where you'd like to track data outside of positions.
- You can provide an enhanced user experience by not limiting the country-specific data that you can track for a person. This promotes collaboration and fosters a safe and inclusive work environment.

Use Cases

- You can accurately calculate pay for a person based on their country-specific information.
- You can configure payroll templates with country-specific fields for third-party payroll providers.

Questions to Consider

Question	Considerations
What types of workers might need additional personal information?	For a person with 1 active position who transfers to another country, you can retain the existing country-based personal information of their former location. You can also collect personal information in the country of their active position. For a person on international assignment with 2 active positions, a home (primary) position and a host position, you can add personal information specific to the host country. You can also maintain and continue to report on personal information specific to the home position country.
Who will be able to view different sets of personal information?	You can use role-based security and segmented security to limit access to personal information. When setting up security, consider: • Personal information is associated with a country. Role-based users can access personal information associated with the country of the position or positions they can access. • When a role-based user has access to a person that isn't based on position, such as a student, the user's access to personal information isn't restricted by country. • An unconstrained user with access to personal information can access personal information for any country. • You can create country-segment security groups to restrict access based on country for unconstrained users. • Self-service users only see the personal information associated with the country of their current and future positions. You can enable a security policy to grant self-service users access to all country-specific sets of personal information that exist for them.

Question	Considerations
What personal information do you want to collect?	Some types of personal information are only applicable to certain countries. For other types of personal information, different countries have varying policies on tracking the information. Workday enables you to specify which countries track these types of personal information.

Recommendations

When setting up security, consider if you want to restrict or grant access to multiple sets of personal information that is automatically available in your tenant.

Requirements

No impact.

Limitations

No impact.

Tenant Setup

No impact.

Security

The *Set Up: Personal Information Country Security Segments* domain in the System functional area enables you to restrict access to personal information based on the country associated with the personal information.

Business Processes

The *Change Personal Information* business process has a new initiating action, Edit Personal Information by Country. It enables unconstrained or segment-based users to add personal information for a country where the worker never worked or was never considered for a position.

Reporting

Users can see all their personal information in the countries in which they have an active or future position in the View My Personal Information by Country report. The All Personal Information for Country report field returns personal information for each country in which a person has personal information. It includes numerous individual report fields that you can use in condition rules and custom reports. The Personal Information for Country field prompts the user for country and returns personal information specific to that country.

Integrations

New versions of the *GET Change Personal Information* and *PUT Change Personal Information* web services support multiple sets of personal information by country.

Workday converted all tenants to support personal information by country so you don't need to modify your integrations to use this feature.

Connections and Touchpoints

Feature	Considerations
Payroll	You can use Workday to manage payroll for: • Canada • France • United Kingdom • United States
Tenant Setup - Payroll	You can enable different countries for Workday Payroll and configure many tenant-wide payroll options.

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

Reference

2022R1 What's New Post: Personal Information by Country

The Next Level: Overview of Primary Position Designation Impact

Steps: Manage Personal Information by Country

Prerequisites

Review setup considerations for personal information by country.

Security: *Personal Data: Personal Information* in the Personal Data functional area.

Context

You can maintain more than 1 set of country-based personal information for a person.

Steps

1. From the related actions menu of a person's profile, access 1 of these tasks or reports:
    - For ESS, Edit Personal Information by Country task.
    - For ESS, View My Personal Information by Country report.
    - For MSS, Edit Personal Information by Country task.
    - For MSS, Personal Information report.

    Workday displays personal information for each country where a person has a position as a worker or where a Pre-Hire was considered for a position. The location of the supervisory organization for a considered Pre-Hire determines the country for personal information. This country can differ from the location of the position.

    Security permissions determine who can access personal information.
2. (Optional) Enable the Self-Service: Personal Information by Country domain security policy.

    Add the relevant self-service security groups to enable self-service users to access their personal information for countries where they don't have a current or future position.

    See ../../../../authentication-and-security/configurable-security/configurable-security-basics/eyf1577465288705.dita.

3. (Optional) Configure the security policy for the *Personal Information Change* business process.

   Access the Business Process Security Policies for Functional Area report.

   Select Business Process Policy > Edit from the related actions menu of the domain security policy.

   Add the relevant unconstrained or country-segment based security groups to the Edit Personal Information by Country initiating action. This configuration enables editing of personal information for additional countries where a worker hasn't held a position or been considered for one.
4. (Optional) Configure country segment-based security.

   Access the Edit Personal Information Country Security Segment task.

   a. Create the security policy for the *Set Up: Personal Information Country Security Segments* domain. Configure the domain with the security groups that need to create Personal Information country security segments. See ../../../../authentication-and-security/configurable-security/security-policies/dan1370797389950.dita.
   b. Create Personal Information country security segments to control access to personal information for a specific country or countries. See ../../../../authentication-and-security/configurable-security/security-groups/segment-based-security-groups/dan1370797248403.dita.
   c. Create a segment-based security group to provide the unconstrained security groups access rights to the Personal Information country security segments. See ../../../../authentication-and-security/configurable-security/security-groups/segment-based-security-groups/dan1370797248403.dita.
   d. Remove the unconstrained security groups that are part of the segment-based security group from the relevant personal data security policies. See ../../../../authentication-and-security/configurable-security/security-policies/dan1370797389950.dita.
   e. If you have several country segment-based security groups that have the same security permissions, create an aggregate security group. See ../../../../authentication-and-security/configurable-security/security-change-control/dan1370796405018.dita.

Result

You can collect, report on, and view multiple sets of country-based personal information at the same time.

Related Information

Reference

2022R1: What's New Post: Personal Information by Country

Reference: Personal Information Fields on page 46

Steps: Set Up Personal Information Fields

Context

You can define the values for certain personal information fields by country or country region.

On personal information tasks, Workday displays the fields and values for workers based on their primary position location. When you opt in to the Personal Information by Country feature, Workday displays personal information for each country where a person has a position as a worker or where a pre-hire was considered for a position.

Depending on the field, you can select a value defined for the country or country region of that location. Example: You can define 8 ethnicity values for Canada. Workers in Canada can select among those values in personal information tasks. Example: If you don't want to track ethnicity in Austria, don't configure values for Austria and Workday automatically hides ethnicity for workers in Austrian locations.

Workday includes personal information fields that can have different values by country and fields that have the same set of values regardless of the country. Example: The value of Marital Status is different by country.

Steps

1. Access the Edit Tenant Setup - Global task.

   Specify which countries track:

   - Citizenship
   - Date Entered Workforce
   - Dependents for Payroll Purposes
   - Medical Exams
   - Multiple Ethnicities
   - Multiple Veteran's Preferences
   - Place of Birth

   Workday displays these fields for workers with a position in a specified country.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.
2. Access the Maintain Localization Settings task.

   Select the *Personal Information* Area. Specify which countries track certain types of personal information, such as nationality, gender identity, and citizenship.

   See Maintain Localization Settings on page 144.
3. Review personal information fields that are non country-specific and fields that are country specific.

   See Reference: Personal Information Fields on page 46.
4. Define values for personal information fields by country or country region.

   See Reference: Personal Information Localizations on page 47 for a list of maintenance tasks to define values for:

   - Aboriginal/Indigenous identification details
   - Citizenship statuses
   - Disability
   - Ethnicities
   - Gender identities
   - Genders
   - Marital statuses
   - Military ranks, statuses, and service types
   - Political affiliations
   - Pronouns
   - Race/ethnicity details
   - Religions
   - Relative types
   - Sexual orientations
   - Sexual orientation and gender identities
   - Social benefits localities
   - Uniform Service Statuses
   - Veteran's Preferences

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
5. (Optional) Access the Maintain Feature Opt-Ins report.

   Select the Multi Select for Gender, Pronoun, and Sexual Orientation task to select multiple values for those fields.
6. (Optional) Access the Maintain Non-Country Nationalities task.

   Create non-country nationalities and specify which countries track them.

7. (Optional) Access the Maintain Custom Labels task.

   Create alternative terms for these fields:

   - Aboriginal/Indigenous Identification
   - Additional Military Service
   - Gender Identity
   - Pronoun
   - Race/Ethnicity Details
   - Region of Birth
   - Sexual Orientation

   Security: *Custom Label Management* domain in the System functional area.
8. (Optional) Send personal data to external endpoints in the Russian Federation using Enterprise Interface Builder.
   a) Create an outbound EIB that uses a copy of 1of these standard reports as a data source:

      - Contact Information Changes
      - Dependents
      - Hire
      - Job History
      - Propose Compensation
      - Proposed/Current Name Changes
      - Proposed/Current Personal Information Changes

      See: Steps: Set Up Outbound EIB.

   b) Add the EIB as an Integration step on 1 of these business processes:

      - Legal Name Change
      - Personal Information Change
      - Preferred Name Change

Next Steps

View the Localized Fields and Values report. It has a consolidated list of worker and job information fields that are specific to each country. This report doesn't display all localized and country-specific fields in Workday. It also excludes fields for which you haven't defined values, even fields applicable to the location.

Related Information

Concepts

Concept: Access to Worker Information on page 76

Concept: Country-Specific Information, Locales, and Languages

Tasks

Edit Personal and Contact Information for Pre-Hires on page 627

Steps: Set Up Race and Ethnicity Details on page 45

Reference

Workday Community: Global Matrix

2023R2: What's New Post: Non-Country Nationalities

2023R2 What's New Post: Military Service Fields

Steps: Set Up Genders by Country

Prerequisites

Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

Context

You can configure country-specific genders that enable users to select the gender with which they identify.

Steps

1. Access the Maintain Genders task.

   You can:

   - Keep existing configured genders.
   - Add rows for any additional genders you want to report on.
   - Select the Inactive check box to remove a gender you don't want to use.
2. Access the Maintain Genders by Country task.

   Enter Gender Code and Gender Description values to display as prompts for gender-related tasks associated with the selected country.Example: Select *Canada*, enter Male_Canada for Gender Code and Male for Gender Description, and select the Is Male check box.

Result

Country-specific genders display on the Change Personal Information task for a worker associated with the configured country.

Related Information

Tasks

Steps: Manage Personal Information by Country on page 35

Reference

2022R1 What's New Post: Configure Gender by Country

Steps: Set Up Reporting Gender

Prerequisites

Security: *Set Up: Contact Info, IDs, and Personal Data* in the Contact Information functional area.

Context

You can report on the gender of an employee who doesn't self-identify or who self-identifies as a gender that doesn't map to male or female.

Steps

1. Edit Domain Security Policies.

   Set up the *Person Data: Reporting Gender* domain in the Personal Data functional area.
2. Maintain Localization Settings on page 144.

   From the Area prompt, select *Personal Information*.

   In the Allow for Countries or Regions column, select the Reporting Gender (Worker) field and countries. For the Reporting Gender (Worker) localized field, select the Active check box.
3. (Optional) Access the Maintain Genders task and the Maintain Genders by Country task to verify gender values and configure as needed.

   Ensure the gender values display on the Reporting Gender prompt.
4. (Optional) Access the Maintain Custom Labels or Maintain Non English Custom Labels task.

   Select HR Compliance and enter a term to override Reporting Gender.

   Security: *Custom Label Management* domain in the System functional area.

Next Steps

Create custom reports for workers' reporting gender details. See Create Custom Reports.

You can view reporting gender details in the Personal Details report.

Related Information
Tasks
Steps: Set Up Personal Information Fields on page 36

Steps: Set Up Gender Pronouns to Display on a Worker Profile

Context

You can enable your organization and workers to configure gender pronouns to display with their name and job title on their public profile. This helps workers feel included and in control of sharing their personal information with others in their organization.

Steps

1. Set up public profile preferences.

   See Steps: Set Up Public Profile Preferences on page 59.
2. Access the Maintain Public Profile Preference task.

   Select the Pronoun check box to enable pronouns to display.

   Security: *Set Up: Public Profile*.
3. Have your workers access the Change Public Profile Preferences task.

   From the Pronoun prompt, have them select *Show to all*.
4. You or your workers access the Change Personal Information task.

   In the Pronoun section, select 1 pronoun option from the Pronoun prompt to display under the worker's name on their profile and on their Personal Details card. The pronoun will display exactly as you configure it for the Pronoun prompt. You can configure pronouns in multiple ways, depending on the needs of your organization. Examples: She/Her, They/Them.

   Security: *Person Data: Personal Information.*
5. (Optional) Access the Configure Profile Summary task to prevent sharing of other personal information such as Military Status or Sexual Orientation..

   Select *Worker Profile* and remove the Personal Details card.

   Security: *Set Up: System.*

Result

Workers' pronouns display within the organization, depending on how you configure visibility for pronouns. Pronouns display under a person's name and on their Personal Details card, regardless of their sharing preferences, for workers and support personnel with appropriate security permissions.

Related Information
Reference
Display Gender Pronouns With Worker Names

Steps: Set Up Audio and Phonetic Name Pronunciation on a Profile

Prerequisites

- Configure the *Name Pronunciation* business process in the Person Data functional area.
- Before recording an audio name pronunciation, you might need to take additional steps to set up Media Cloud based on your organization's subscription service agreement. For more information, see Getting Started with Workday Media Cloud.

Context

Enable workers to record an audio pronunciation of their name and add it to their profile. Workers can also add a phonetic pronunciation of their name to their profile. This provides a positive user experience, promotes collaboration, and fosters a safe and inclusive environment for workers.

Steps

1. Edit Domain Security Policies.

   Edit permissions for these domain security policies:

   - *Person Data: Name Pronunciation* in the Personal Data functional area.
   - *Self-Service: Name Pronunciation* in the Personal Data functional area.
2. Maintain Localization Settings.

   At the Area prompt, select *Personal Information*:

   - Enable the Audio Pronunciation field to add an audio pronunciation.
   - Enable the Phonetic Pronunciation field to add a phonetic pronunciation.
   - Select the countries for the localized fields.
   - Select the Active check box to activate a setting.
3. (Optional) Access the *Name Pronunciation* business process definition to add an approval step.
4. Access the Change My Name Pronunciation task.

   - Click the microphone to record your audio name pronunciation. You can listen to the recording and replace it if desired.
   - Enter a phonetic pronunciation of your name. Example: Enter *A-ver-ree Shi-vawn* as the phonetic pronunciation of Avery Siobhan.
   - Click Submit to add the recording to your profile, or route it for approval if you configured an approval step.
5. (Optional) Maintain Custom Labels.

   At the Term Context prompt, select *Global* and override the Audio Pronunciation field, or the Phonetic Pronunciation field, or both.
6. (Optional) Configure help text on the *Name Pronunciation* business process.

Result

The speaker icon displays under a worker's name on their profile. The phonetic pronunciation displays under a worker's name on their profile.

Related Information

Reference

2023R1 What's New Post: Name Pronunciation on Profile

Steps: Set Up Personal Information for Multiple Person Types

Context

A company or institution can have several different person types, such as candidates, students, and workers. In addition, individuals within an organization can be more than 1 of these person types at once:

- Academic affiliate.
- External committee member.
- External student.
- Student.
- Student prospect.
- Worker.

When your organization uses multiple person types, you must configure personal information business processes and security policies to ensure that personal data for all person types is secure.

Steps

1. Set up all of these business processes that apply to your organization:

    - *Edit Government IDs*
    - *Edit ID Information*
    - *Edit Licenses*
    - *Edit Other IDs*
    - *Legal Name Change*
    - *Passports and Visa Change*
    - *Preferred Name Change*
    - *Personal Information Change*

    See Steps: Configure Business Process Definitions.
2. Maintain Organization Type Precedence.

    In a company or institution with multiple person types, you must define an organization type precedence to enable Workday to know which business process to launch first. Example: For a person who is both a student and a worker, the precedence definition for the *Legal Name Change* business process is the Supervisory organization.
3. Create Business Process Condition Rules.

    Configure condition rules to route business processes for a supervisory organization or academic unit using these fields as conditions:

    - Active worker.
    - Is Affiliate.
    - Is Student.
    - Is Student Prospect.

    Example: A university administrator can set up condition rules so that student approval steps route to a student administrator and worker approval steps route to an HR administrator.

    Condition rules take priority over organization precedence.

    Note: If your business processes use unconstrained security groups, those groups automatically have access to the personal information of person types other than workers. If that is acceptable, the setup is complete. If you don't want the unconstrained security groups to have that type of access, continue with steps 4 - 6.
4. (Optional) Create Segment-Based Security Groups.

    Create segment-based security groups so that unconstrained security groups in your business process don't have access to certain information. Example: If a university administrator doesn't want workers to access personal information of academic affiliates, they can replace the unconstrained HR Administrator security group for both person types. A new segment-based security group called HR Administrator for Worker can control access to the personal information.
5. (Optional) Edit Business Process Security Policies.

    Set up the business process security policy using the security groups you set up. If you assign a segment-based security group to actions on a business process, you must also assign the group to the subprocess actions so they initiate successfully.
6. (Optional) Edit Domain Security Policies.

    Set up the domain security policy using the security groups you set up. If you assign segment-based security groups to these domains, you must do the same for any custom objects on the domain. If you don't, the business processes that use these custom objects won't execute successfully.

Related Information

Concepts

Concept: Configurable Security

Concept: Security Policies

Concept: Security for Custom Objects

Steps: Set Up Disability Tracking

Prerequisites

Security:

- *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
- *Set Up: Tenant Setup - Global* domain in the System functional area.

Context

You can track disability types by country or country region. You can also track disability certification data, severity, and grades by country. When you enable disability tracking, global disability fields are available in the Edit Personal Information task along with any localized fields you configure.

Steps

1. Access the Maintain Disability Configuration task.
2. Select the Country or Country Region.
3. In the Disability Type grid, define the types of disabilities and the applicable subjects you want to track.

   You can restrict a disability type from either workers or dependents using the Applicable Subjects prompt and selecting:

   - *Worker*: The disability type applies to workers and all other person types except dependents.
   - *Dependent*: The disability type applies to dependents and all other person types except workers.

   The disability type applies to all person types if the Applicable Subjects prompt is blank.

   Note: Define at least 1 disability type to enable disability tracking in the country or country region. If you want to track other disability data but not the type, create a generic disability type.
4. In the Certification and Severity and Grade sections, specify which fields to track by selecting the check boxes.

   - If you select Certification Basis or Grade, you must also define country-specific values for selection.
   - If you select Certified By, you can define values for selection or leave the table blank to use a free-form text field for certifying authorities.
   - If you leave the Restricted to Disability Types field blank, that basis, authority, or grade is available for all disability types in that country.
     - If you add a new disability type, save it and navigate back to this task to restrict basis, authorities, or grades.

   The fields in these sections apply to all workers in the country, regardless of country region.

5. (Optional) Select or clear the check boxes to enable or disable any fields in these sections:
   - Disability Date
   - Severity and Grade
   - Additional Disability Information
   - Notes and Attachments

   When you disable a field, you can no longer enter, edit, or add data to it. Existing disability data remains on a field, unless you manually remove it. Disabled fields no longer display when you edit a worker's personal information.
6. Access the Maintain Localization Settings task.
   a) Select Personal Information.
   b) Select the Active check box to display disability information on worker or candidate profiles by country and when viewing or editing personal information.
   c) Clear the check box to hide disability information.

Next Steps

Track disability data for workers and pre-hires with the Edit Personal Information or Edit Personal Information for Pre-Hire task.

Related Information

Concepts

Concept: Country-Specific Information, Locales, and Languages

Tasks

Steps: Set Up Personal Information Fields on page 36

Steps: Set Up Aboriginal/Indigenous Identification Details

Prerequisites

Security:

- *Person Data: Aboriginal/Indigenous Identification* domain in the Person Data functional area.
- *Self Service: Aboriginal/Indigenous Identification* domain in the Person Data functional area.

Context

Workday enables workers to provide more granularity around self-identifying as Aboriginal/Indigenous, helping you with your diversity and inclusion goals.

Steps

1. Edit Domain Security Policies.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
2. Maintain Localization Settings on page 144.

   From the Area prompt, select *Personal Information*. Select the Aboriginal/Indigenous Identification (Worker) and Aboriginal/Indigenous Identification Details (Worker) check boxes. Select the countries for these localized fields.
3. Access the Maintain Aboriginal/Indigenous Identification Details task.

   Configure values for details that display for workers in the Aboriginal/Indigenous Identification Details prompt on the Change My Personal Information task.
4. (Optional) Create Custom Labels.

   From the Term Context prompt, select *Global* and override the Aboriginal/Indigenous Identification Details field.

Next Steps

Create custom reports for workers' Aboriginal/Indigenous identification details.

View your configuration for Aboriginal/Indigenous identification details using the View Aboriginal/ Indigenous Identification Details report.

Related Information
Tasks
Steps: Set Up Aboriginal/Indigenous Self-Identification for Candidates on page 347
Reference
2021R2 What's New Post: Aboriginal and Indigenous Identification

Steps: Set Up Race and Ethnicity Details

Context

Workday enables workers to provide more granularity around self-identifying their race and ethnicity, helping you with your diversity and inclusion goals.

Steps

1. Edit Domain Security Policies.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
2. Access the Maintain Ethnicities task.

   Configure race and ethnicity values that display for workers on the Race/Ethnicity prompt on the Change My Personal Information task.
3. Maintain Localization Settings on page 144.

   At the Area prompt, select *Personal Information*, and enable the Race/Ethnicity Details (Worker) field.
4. Access the Maintain Race/Ethnicity Details task.

   Configure values for race and ethnicity details that display for workers on the Race/Ethnicity Details prompt on the Change My Personal Information task.
5. (Optional) Create Custom Labels.

   At the Term Context prompt, select *Global*, and override the Race/Ethnicity Details field.

Next Steps

Create custom reports for workers' race and ethnicity details.

View your configuration for race and ethnicity details using the View Race/Ethnicity Details report.

Related Information
Tasks
Steps: Set Up Personal Information Fields on page 36
Reference
2021R2 What's New Post: Expand Race and Ethnicity Capabilities
Reference: Personal Information Localizations on page 47

Add Help Text for Personal Information

Prerequisites

Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

Context

Configure help text on the *Change Personal Information* business process by adding text to sections and fields on the Edit Personal Information task. The help text explains the reason for collecting personal information.

Steps

1. Access the Maintain Personal Information Help Text task.

   Select a Country. Enter and format help text that is appropriate for the country and your organization.
2. Access the View Personal Information Help Text report.

   Select a Country to display its personal information help text.

Result

Instructional text is available to guide users entering self-identification data.

Related Information
Reference
2021R2 What's New Post: Personal Information Help Text

Concept: Custom Label for Gender

If you want to use a different term for gender throughout Workday, access the Maintain Custom Labels task to override the term. Example: you can use a term such as sex or sex assigned at birth instead of gender. Using a custom label for gender can help support inclusion and diversity, and comply with government regulatory requirements in Canada.

Workday displays the custom label instead of the default label in:

- Field labels.
- Help text.
- Prompts.
- Task names.
- Validations.
- Workday-delivered report fields and report names.

Custom labels can't replace gender in certain fields required by government agencies:

- Centers for Medicare & Medicaid Services (CMS) VDSA integration:
  - Beneficiary Sex Code report field.
  - Gender - CMS label.
- UK Government:
  - Gender Pay Gap
  - Current Gender label in the RTI FPS report.

In addition, you can't override the term gender in the gender identity value on the Maintain Custom Labels task.

Related Information
Tasks
Create Custom Labels

Reference: Personal Information Fields

Workday includes personal information fields that can have different values by country and fields that have the same set of values regardless of the country.

Country-Specific Personal Information Fields:

- Aboriginal/Indigenous Identification & Aboriginal/Indigenous Identification Details
- Additional Military Service
- Country Specific Section 1
- Country Specific Section 2
- Country Specific Section 3
- Disability
- Gender
- Hispanic/Latino
- Hukou
- Marital Status
- Political Affiliation
- Race/Ethnicity
- Relative Names
- Religion
- Reporting Gender
- Sexual Orientation & Gender Identity (LGBT Identification)
- Social Benefits Locality

Non Country-Specific Personal Information Fields:

- Additional Nationalities
- Blood Type
- Citizenship Status
- City of Birth
- Country of Birth
- Date of Birth
- Date of Death
- Gender Identity
- Medical Exams
- Military Service
- Non Country Specific Section 1
- Non Country Specific Section 2
- Non Country Specific Section 3
- Primary Nationality
- Pronoun
- Region of Birth
- Sexual Orientation

Reference: Personal Information Localizations

Localized fields refer to personal information that applies to certain countries. Workday enables you to specify which countries track these types of personal information.

When applicable, use the related actions to define values for a localization after enabling it for a country.

Localized Field	Description	Related Task
Aboriginal/Indigenous Identification (Worker)	Tracks Aboriginal/Indigenous Identification for a worker.	
Aboriginal/Indigenous Identification Details (Worker)	Tracks Aboriginal/Indigenous Identification details for a worker.	Maintain Aboriginal/Indigenous Identification Details

Localized Field	Description	Related Task
Active Military Uniformed Service	Tracks active military uniformed service for the specified person type.	Change My Personal Information
Additional Nationalities (Worker, Dependent, Pre-Hire)	Tracks additional nationalities for workers, dependents, and pre-hires. To track additional nationalities, a country must first track primary nationalities.	
Advanced Disability (Dependent)	Tracks advanced disabilities for dependents.	
Basic Disability (Dependent)	Tracks basic disabilities for dependents.	
Allowed for Tax Deduction (Dependent)	Tracks whether dependents are eligible for tax deductions.	
Annual Income (Dependent)	Tracks the annual income for dependents.	
Audio Pronunciation (Worker)	An audio pronunciation of a person's name.	
Blood Type (Worker)*	Tracks the blood type for the worker.	
Citizenship Status (Dependent)*	Tracks the citizenship status for dependents.	Maintain Citizenship Statuses
Citizenship Status (Pre-Hire)*	Tracks the citizenship status for pre-hires.	Maintain Citizenship Statuses
Citizenship Status (Worker)*	Tracks the citizenship status for workers.	Maintain Citizenship Statuses
City of Birth (Dependent)*	Tracks the city of birth for dependents.	
City of Birth (Pre-Hire)*	Tracks the city of birth for pre-hires.	
City of Birth (Worker)*	Tracks the city of birth for workers.	
Country of Birth (Dependent)*	Tracks the country of birth for dependents.	
Country of Birth (Pre-Hire)*	Tracks the country of birth for pre-hires.	
Country of Birth (Worker)*	Tracks the country of birth for workers.	
Covered by Worker's Health Insurance (Dependent)	Tracks whether or not a dependent has valid health insurance.	
Date of Birth (Candidate)*	Tracks the date of birth for candidates.	

Localized Field	Description	Related Task
Date of Birth (Pre-Hire)*	Tracks the date of birth for pre-hires.	
Date of Birth (Worker)*	Tracks the date of birth for workers.	
Disability (Candidate)	Tracks disability for candidates.	Maintain Disability Configuration
Disability (Worker)	Tracks disability for workers.	Maintain Disability Configuration
Full-Time Student Status (Dependent)	Tracks full-time student status for the specified person type.	
Gender (Candidate)*	Tracks the gender for candidates.	Maintain Genders
Gender (Pre-Hire)*	Tracks the gender for pre-hires.	Maintain Genders
Gender (Worker)*	Tracks the gender for workers.	Maintain Genders
Gender Identity (Worker)*	Tracks gender identities for workers.	Maintain Gender Identities
Government Identifiers (Candidate)	Tracks government identifiers for the specified person type.	
Hispanic/Latino (Candidate)	Tracks Hispanic or Latino for the specified person type.	
Hispanic/Latino (Worker)	Tracks Hispanic or Latino for the specified person type.	
ID Info (Pre-Hire)	Tracks IDs for pre-hires.	Create National ID Type Maintain Additional Government ID Types
Lives with Worker (Dependent)	Tracks if dependents live with a worker.	
Marital Status (Candidate)*	Tracks the marital status for candidates.	Maintain Marital Statuses
Marital Status (Pre-Hire)*	Tracks the marital status for pre-hires.	Maintain Marital Statuses
Marital Status (Worker)*	Tracks the marital status for workers.	Maintain Marital Statuses
Medical Exams (Worker)	Tracks medical exams for workers.	
Military Service (Candidate)	Tracks military service for candidates.	Maintain Military Service Types
Military Service (Worker)	Tracks military service for workers.	Maintain Military Service Types
Occupation (Dependent)	Tracks the occupation of dependents.	

Localized Field	Description	Related Task
Personal Information (Pre-Hire)	Tracks personal data (marital statuses, ethnicities, and so on) for pre-hires.	
Phonetic Pronunciation (Worker)	The phonetic pronunciation of a person's name.	Change My Name Pronunciation
Political Affiliation (Pre-Hire)*	Tracks political affiliations for pre-hires.	Maintain Political Affiliations
Political Affiliation (Worker)*	Tracks political affiliations for workers.	Maintain Political Affiliations
Preferred Communication Language (Worker)	Tracks the preferred communication language for workers.	Configure Preferred Communication Languages
Primary Nationality (Dependent)*	Tracks the primary nationality for dependents.	
Primary Nationality (Pre-Hire)*	Tracks the primary nationality for pre-hires.	
Primary Nationality (Worker)*	Tracks the primary nationality for workers.	
Pronoun (Candidate)	Tracks pronoun for a specified person type.	
Pronoun (Worker)*	Tracks pronoun for a specified person type.	Maintain Pronouns
Race/Ethnicity (Worker)	Tracks race/ethnicity for workers.	Maintain Ethnicities
Race/Ethnicity Details (Worker)	Tracks race/ethnicity details for workers.	Maintain Race/Ethnicity Details
Region of Birth (Dependent)*	Tracks the region of birth for dependents.	
Region of Birth (Pre-Hire)*	Tracks the region of birth for pre-hires.	
Region of Birth (Worker)*	Tracks the region of birth for workers.	
Relatives' Names (Worker)	Track the names of relatives for workers.	Maintain Relative Types
Religion (Candidate)	Tracks religion for candidates.	Maintain Religions
Religion (Pre-Hire)*	Tracks religion for pre-hires.	Maintain Religions
Religion (Worker)*	Tracks religion for workers.	Maintain Religions
Reporting Gender (Worker)	Tracks the gender of an employee who doesn't self-identify or who self-identifies as a gender that doesn't map to male or female.	Maintain Genders and Maintain Genders by Country

Localized Field	Description	Related Task
Selective Service Registration	Tracks Selective Service Registration for the specified person type.	Change My Personal Information
Sexual Orientation (Candidate)	Tracks the sexual orientation for the specified person type.	Maintain Sexual Orientations
Sexual Orientation (Worker)*	Tracks the sexual orientation for the specified person type.	Maintain Sexual Orientations
Sexual Orientation & Gender Identity (Worker)	Tracks sexual orientation and gender identity for workers.	Maintain Sexual Orientations & Gender Identities
Social Benefits Locality (Worker)	Tracks social benefits locality for workers.	Maintain Social Benefits Localities
Uniform Service Reserve Status	Tracks Uniform Service Reserve Status for the specified person type. Configure values on the Maintain Uniform Service Reserve Statuses task.	Change My Personal Information
Veteran's Preference	Tracks a veteran's preference for the specified person type. Configure values on the Maintain Veteran's Preferences task.	Change My Personal Information
Veteran's Preference for RIF	Tracks a veteran's preference for RIF for the specified person type.	Change My Personal Information

* You can require these localizations for a country.

You can hide localizations for a country by not selecting the country from the Allow for Countries or Regions prompt.

Related Information

Concepts

Concept: Access to Worker Information on page 76

Tasks

Steps: Set Up Personal Information Fields on page 36
Steps: Set Up Prospects and Candidates on page 245
Manage Dependents and Beneficiaries on page 1500
Edit Personal and Contact Information for Pre-Hires on page 627
Steps: Set Up Race and Ethnicity Details on page 45
2023R2 What's New Post: Military Service Fields

Configurable Fields for Personal Information

Setup Considerations: Configurable Fields for Personal Information

You can use this topic to help make decisions when planning your configuration and use of configurable fields for personal information. It explains:

- Why to set them 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.

For full configuration details, see task instructions.

What They Are

You can define and configure the personal information data fields that you want to collect and manage for your users. You can collect both country-specific and non-country-specific data.

Business Benefits

- You can tailor personal data collection more precisely to meet your needs and provide a better user experience for your workers.
- You aren't limited to collecting personal information for Workday-delivered fields. You can configure personal information fields specific to your organization.

Use Cases

Configure:

- Country-specific fields to provide prompt options by country, similar to delivered fields like Marital Status and Race/Ethnicity.
- Non-country-specific fields that enable you to have global prompt options, similar to delivered fields like Pronoun, Gender, and Sexual Orientation.
- Frequently requested types of personal information. Example: A person's status in these areas:
    - Caregiver
    - Immigration
    - Neurodiversity
    - Socioeconomic
    - Transgender

Questions to Consider

Question	Consideration
How can you make configurable fields for personal information translatable?	You can translate: • Drop-down values using the Business Object Translations task. • Help text using the Business Object Translations task. • Section and field labels using the Maintain Non-English Custom Labels task.
How can you use configured fields for personal information in a payroll integration?	You can use field overrides in these integrations to retrieve your configurable field values: • *Payroll Effective Change Interface (PECI)* • *Payroll Interface Common Output File (PICOF)*

Recommendations

When you configure domains for their corresponding sections, add a Note in Workday that describes what the domain secures, because custom labels don't display in domain names. Example: This domain secures Caregiver Status information.

Requirements

No impact.

Limitations

You can only use this feature to collect personal data for a worker. You can't configure personal information for candidates.

You can't configure personal information as free-form text, only as prompt options.

Tenant Setup

To enable multi-select for configurable fields, access the Edit Tenant Setup - Global task.

Security

Domain	Description
Set Up: Contact Info, IDs, and Personal Data in the Contact Information functional area.	Enable this domain to provide access to the Configure Personal Information Sections task.
These domains in the Personal Data functional area: • *Person Data: Country Specific Section 1* • *Person Data: Country Specific Section 2* • *Person Data: Country Specific Section 3* • *Person Data: Non Country Specific Section 1* • *Person Data: Non Country Specific Section 2* • *Person Data: Non Country Specific Section 3*	Enable the domain that corresponds to the section you've enabled. These domains provide access to security groups to view personal information data on the worker. Example: When you set up values for Country Specific Section 1, you need to enable the *Person Data: Country Specific Section 1* domain.
• *Self-Service: Country Specific Section 1* • *Self-Service: Country Specific Section 2* • *Self-Service: Country Specific Section 3* • *Self-Service: Non Country Specific Section 1* • *Self-Service: Non Country Specific Section 2* • *Self-Service: Non Country Specific Section 3*	Enable the domain that corresponds to the field you've enabled. These domains provide access to self-service security groups to view their own personal information data. Example: When you set up values for Country Specific Section 1 - Field 1, you need to enable the *Self-Service: Country Specific Section 1* domain.

Business Processes

You can use the *Change Personal Information* business process to update a worker's personal information.

Reporting

Workday-delivered report fields enable you to report on personal information on these business objects:

- Personal Information Change Event
- Personal Information for Country (for country-specific sections)
- Worker

You can add new report fields to existing reports or build new custom reports to report on new configurable fields.

Integrations

You can use field overrides in these integrations to retrieve configurable field values:

- *Payroll Effective Change Interface (PECI)*
- *Payroll Interface Common Output File (PICOF)*

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 Configurable Fields for Personal Information

Prerequisites

Review the example of creating a new section with configurable fields to understand the dependency of fields in the configuration. See Example: Create a New Section with Configurable Fields for Personal Information on page 55

Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

Context

You can define the personal information data fields that you want to collect and manage for your users, including both country-specific data and non-country-specific data. You can build new reports for the new configurable fields or add new report fields to existing reports.

Steps

1. Access the Configure Personal Information Sections report.

   Define prompt values for each section and field that you want to configure. You can configure up to 3 fields in each section.

   a) Select a county-specific section or a non-country-specific section.
   b) Select a section to configure and select a country if you selected a country-specific section.
   c) Configure the values you want to display on the personal information fields. You can optionally restrict values to specific sections, which creates a dependency between them.

      Example: You want to configure personal information sections and fields for caregiver status in the United States. In the Country Specific Section 1 - Field 1 section, enter these values:

      - *Yes*
      - *No*

      In the Country Specific Section 1 - Field 2 section, enter these values:

      - *Child caregiver*
      - *Adult caregiver*

      From the Restricted to Country Specific Section 1 - Field 1 prompt, select *Yes*.
2. Enable the security domains that correspond to the sections you configured.

   Example: If you configure values for Country Specific Section 1, enable these domains in the Personal Data functional area:

   - *Person Data: Country Specific Section 1*
   - *Self-Service: Country Specific Section 1*

   See: ../../../../authentication-and-security/configurable-security/configurable-security-basics/eyf1577465288705.dita.

3. Access these tasks:
   - Maintain Custom Labels
   - Maintain Non-English Custom Labels

   a) From the Term Context prompt, select *Personal Information: Configurable Fields*.
   b) Enter terms to override the delivered labels for configurable sections and fields.
4. Access the Maintain Localization Settings task.
   a) From the Area prompt, select *Personal Information: Configurable Fields*.
   b) Enable and require the localized fields per country for the section you configured.
5. (Optional) Access the Maintain Personal Information Help Text task.

   Create section and field level help text per country.
6. (Optional) Access the Edit Tenant Setup - Global task.

   In the Allow Multiple Values for Configurable Personal Information Fields section, enable configurable personal information fields for multiple values.

Result

Workday displays the configured fields as prompts for workers entering their personal information on these tasks:

- Change My Personal Information
- Edit Personal Information
- Edit Personal Information by Country

Related Information
Examples
2024R1 What's New Post: Configurable Fields for Personal Information

Example: Create a New Section with Configurable Fields for Personal Information

This example illustrates how to use configurable personal information sections and fields to create a new personal information section that enables you to collect specific information to support your changing business needs and local compliance regulations. This example creates a section for Caregiver Status.

Context

Many workers in your company are also caregivers. You want to set up a Caregiver Status section to collect caregiver information from employees when they edit their personal information.

Steps

1. Enable the *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area and configure security policies.

   See: ../../../../authentication-and-security/configurable-security/configurable-security-basics/eyf1577465288705.dita.

2. Access the Configure Personal Information Sections report.
    a) From the Section prompt, select *Country Specific Sections > Country Specific Section 1*.
    b) From the Country/Country Region prompt, select *United States of America*.
    c) In the Country Specific Section 1 - Field 1 section, add rows with these values:
        - Yes
        - No
        - Decline to answer
    d) Click Next.
    e) In the Country Specific Section 1 - Field 2 section, add rows with these values:
        - Child caregiver
        - Adult caregiver
    f) Select the Restricted to Country Specific Section 1 - Field 1 check box and select Yes from the drop-down.
    g) Click Next.
    h) In the Country Specific Section 1 - Field 3 section, add rows with these values:
        - Infant caregiver
        - Special needs child
    i) Select the Restricted to Country Specific Section 1 - Field 2 check box and select Child caregiver from the drop-down.
    j) Click OK.
3. Access the Maintain Custom Labels task.

    Override the country specific sections and fields that you've configured:
    a) Select Personal Information: Configurable Fields from the Term Context prompt.
    b) Enter these values:

Populate Value	Override Value
Country specific section 1	Caregiver Status
Country specific section 1 - field 1	Do you identify as a caregiver?
Country specific section 1 - field 2	Caregiver details
Country specific section 1 - field 3	Additional caregiver details

    c) Click OK and Done.
4. Access the Maintain Localization Settings task.

    Define the caregiver status fields that you've configured.
    a) Select Personal Information: Configurable Fields from the Area prompt.
    b) For each localized field that you configured, select *United States of America* in the Allow for Countries or Regions field.
    c) Click OK and Done.
5. Access the Edit Tenant Setup - Global task.
    a) In the Allow Multiple Values for Configurable Personal Information Fields section, select the Enabled for Multiple Values check box for these fields:
        - Caregiver status
        - Additional caregiver details
6. Click OK and Done.

Result

When an employee in the United States edits their personal information, they can access the Caregiver Status section. As they answer the questions, they can view the dependencies that you set up to restrict the values that an employee can select.

- When the employee answers Yes to the Do You Identify As A Caregiver? question, we display the Caregiver Details field.
- When they select Child Caregiver, we display the Additional Caregiver Details field.
- When they select Adult Caregiver, we don't display the Additional Caregiver Details field.

When the employee submits their changes, they can view the values on their personal information page.

Public Profile Preferences

Setup Considerations: Public Profile Preferences

You can use this topic to help make decisions when planning your configuration and use of public profile preferences. 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

Public profile preferences enable workers to select certain personal and talent information as public on their worker profile and related reports.

Business Benefits

- Help create a corporate culture of diversity and inclusion.
- Continue to collect personal information while giving workers more control over the information shared with others in their organization.

You can enable workers to:

- Control their personal brand with how they want to identify themselves.
- Find others with similar backgrounds, creating affinity groups.

Use Cases

- Collect information that's restricted to support roles.
- Enable workers to specify certain personal and talent information as public on their worker profile and related reports.

Questions to Consider

Questions	Considerations
What happens if a worker has a primary job location in a country that restricts certain personal information collection?	You can configure localization settings to override the preferences you set for workers when they work in a particular location.

Questions	Considerations
Example: You enable sexual orientation tracking for the entire company, but the company has a business location in a country with restrictions.	
Can anyone access the personal information that a worker selects to hide from their worker profile?	When a user has security access, they can view the information.
How can I report on public profile preferences?	You can use these report fields in custom reports and condition rules: • Public Preference - Education • Public Preference - Military Service • Public Preference - Pronoun • Public Preference - Sexual Orientation

Recommendations

Configure help text for workers on these business processes:

- *Manage Education*
- *Personal Information Change*

Create a To Do on the *Personal Information Change* business process. When workers make a change to their personal or talent information, they receive a reminder to check their public profile preference elections.

Review the description of the Change Public Profile Preferences task to decide which personal information to display.

Requirements

No impact.

Limitations

When a worker shares their information, all elements associated with that information are visible. Example: When a worker shares their education information, Workday displays all of their education information to anyone with access. The worker can't select to display only certain colleges.

Tenant Setup

No impact.

Security

Domains	Considerations
Reports: Public Profile in the Personal Data functional area.	Secures report fields for public profile preferences. The report fields provide information on whether the worker decided to enable certain person and talent information as public on their public profile cards. The information these report fields return depends on your settings on these tasks: • Change Public Profile Preferences • Maintain Localization Settings • Maintain Public Profile Preferences

Domains	Considerations
Set Up: Public Profile in the System functional area.	Secures tasks that give access to configuring public profile preferences.

Business Processes

Business Processes	Considerations
Public Profile Preferences	Enables workers to decide which personal information is public on their worker profile.

Reporting

Report Fields	Considerations
Public Preference - Education	Indicates whether education is public on the worker's profile and related reports.
Public Preference - Military Service	Indicates whether military service is public on the worker's profile and related reports.
Public Preference - Pronoun	Indicates whether pronouns are public on the worker's profile and related reports.
Public Preference - Sexual Orientation	Indicates whether sexual orientation is public on the worker's profile and related reports.

Integrations

No impact.

Connections and Touchpoints

Public profile preferences interact with:

- Talent.
- Worker information. Example: Information that a worker chooses to share, such as their birthday, can display in the Important Dates section on the Home Page if that section is configured in their tenant. See: Reference: Home Page Sections.

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.

Steps: Set Up Public Profile Preferences

Context

Enable your workers to decide which personal and talent information is public on their worker profile and in related reports. This promotes inclusion and helps workers feel in control of sharing their personal information with others in their organization.

Steps

1. Edit Domain Security Policies.

   Edit permissions for these domain security policies:

   - *Reports: Public Profile* in the Personal Data functional area.
   - *Self-Service: Pronoun* in the Personal Data functional area.
   - *Set Up: Public Profile* in the System functional area.
2. Activate Pending Security Policy Changes.
3. Access the Create Business Process Definition (Default Definition) task.

   Create the default definition for the *Public Profile Preferences* business process in the Personal Data functional area if it doesn't exist in your tenant.
4. Edit Business Process Security Policies.

   Configure the *Public Profile Preferences* business process security policy in the Personal Data functional area.
5. Set up segment-based security groups on the appropriate domains for public profile preferences.

   See Steps: Set Up Segmented Security for Public Profile Preferences on page 61.
6. Set up profile cards.

   On the Configure Profile Summary task, select *Personal Details* to display the public profile card for:

   - Birthday.
   - Military Service.
   - Pronoun.
   - Sexual Orientation.

   Select *Education* to display the public profile card for education.

   See Steps: Set Up Profile Cards.
7. Access the Maintain Public Profile Preferences task.

   Select the Personal Information and Talent Related Information fields that you want to enable for workers.
8. Maintain Localization Settings on page 144.

   At the Area prompt, select *Personal Information*. Localization settings are available for these fields:

   - Date of Birth (Worker)
   - Military Service (Worker)
   - Pronoun (Worker)
   - Sexual Orientation (Worker)

Next Steps

You can create custom affinity reports for your workers.

Workers can access the Change Public Profile Preferences task to select the enabled personal and talent information they want public on their worker profile and in related reports.

Related Information

Tasks

Create Custom Reports

Steps: Set Up Gender Pronouns to Display on a Worker Profile on page 40

Reference

Reference: Core Navigation

2023R2 What's New Post: Birthday Sharing with Public Profile Preferences

Steps: Set Up Segmented Security for Public Profile Preferences

Context

Configure segment-based security to grant access to certain personal and talent information to members of designated security groups. Example: You can configure a segment-based security group to enable members of the *All Employees* security group to view education information for employees who make their education data public.

Steps

1. Create Segment-Based Security Groups.

   Specify which security groups can access these segments:

   - *Public Profile: Birthday*
   - *Public Profile: Education*
   - *Public Profile: Military Service*
   - *Public Profile: Pronoun*
   - *Public Profile: Sexual Orientation*

   Include only 1 public profile security segment for each segment-based security group.

   Example: The *Public Profile Access (Education)* segment-based security group includes the *All Employees* security group with access to the *Public Profile: Education* segment.
2. Edit Domain Security Policies.

   Grant View access to the appropriate segment-based security groups on the appropriate domain:

   - *Public Profile Preferences: Birthday*
   - *Person Data: Education*
   - *Person Data: Military Status*
   - *Person Data: Pronoun*
   - *Person Data: Sexual Orientation*

   Remove any existing security groups that grant access to all users from these security policies. Example: Remove *All Employees* and replace it with the appropriate segment-based security group.

   Note: You must add the correct segment-based security group to the appropriate domain or you could allow others to view other sensitive worker information.
3. Activate Pending Security Policy Changes.

Result

Segment-based security group members can view public information on worker profile cards, which are on the Summary section of the worker profile.

Related Information
Reference
2023R2 What's New Post: Birthday Sharing with Public Profile Preferences

Names

Setup Considerations: Name Configuration by Country

You can use this topic to help make decisions when planning your configuration and use of names by country. 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 enables you to control how your tenant collects name data at the country level, so you can:

- Hide or require name components, such as prefixes or middle names, or make them optional.
- Select basic configuration options for countries with local script.
- Control the behavior of name components you define for specific countries.

Business Benefits

Name configuration by country enables you to:

- Only collect name data relevant for your company.
- Improve the user experience by reducing data entry confusion, which improves data accuracy and worker efficiency.

Use Cases

- Hiding optional name components, such as middle name, prefix, and suffix, so you collect only name data that meets your business needs.
- Enforcing local names for workers who only have a local name, giving you more control over your name data.

Questions to Consider

Question	Considerations
What is the recommended option to require local script?	We recommend you use the *Local Script required* option to collect a minimum set of local script name components and other name components on the Maintain Name Components by Country task. Otherwise, you can use the *Western Script required* option to collect a minimum set of Western script name components and any local script name components you select.
Why do you want to override required local script or Western script name components?	An administrator without knowledge of a local script might need to add a person's name for a country with local script names. You can select the *Enable Western Script check box* option on the Maintain Name Components by Country task. When you do this, Workday displays a check box on name tasks that the administrator can select to enter a name in Western script instead. Enabling Western script makes it required and makes local script not required for a particular name.
What does the *Enable Enter Western Script check box* option do?	This option: • Makes the Enable Western Script check box available on name tasks. • Gives you the flexibility to make Western script or local script required, depending on if you select the check box.

Question	Considerations
	• When you select it, Western script name component fields become available for edit.
What happens if name data exists on a component that you want to hide?	When you modify a name configuration, your selections on the Maintain Name Components by Country task can impact the name data you collect and save after you edit it. Example: When you collect middle names but hide them later, Middle Name is no longer collected when a user makes a change to their name.
When you make Western script names optional for a country, what is the default option for those names?	Those name configurations are set by default to the *Enable Western Script check box* option.
When you require Western script names for a country, what is the default option for those names?	Those name configurations are set by default to the *Western Script required* option.
Does the Maintain Name Components by Country task control how names display in your tenant?	No. This task only controls collection of names; it doesn't affect how names display. Access the Name Formats for Country report to view how names are set up for display.

Recommendations

Workday recommends that you require the same name components for both web services and the user interface, especially when you want web services to initiate business process approvals. When you set web services and the user interface to require different name components, you risk bringing incomplete data into your tenant.

In addition, when web services trigger approvals, the user interface requirements apply and approvers must enter any missing data. If you do need a web service to bring in different name data, we recommend that you set up web services to autocomplete and bypass approvals.

Requirements

You must use Workday Web Services v.33 or higher for name configuration changes that you make on the Name Components and Recruiting Name Components tabs of the Maintain Name Components by Country task to take effect.

Limitations

No impact.

Tenant Setup

No impact.

Security

The *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area enables you to configure name components.

Business Processes

No impact.

Reporting

Access the Name Components tab on the View Country report or the View Name Components by Country report to see country name configurations.

Integrations

Hiding or requiring name components can impact your integrations. Setting up names in your tenant without properly assessing how it works with your integrations might cause them to fail. We recommend that you test your name configuration with your integrations before you set up names in your Production tenant.

The Core Connector: Worker integration supports worker personal data, including name data. See: Concept: Core Connector: Worker Integration Data Mapping.

Connections and Touchpoints

Names touch all functional areas in Workday. Access the Name Components tab on the Maintain Name Components by Country task to configure names, except for recruiting. To configure names for Workday Recruiting, access the Recruiting Name Components tab on the Maintain Name Components by Country task.

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 Worker Names

Context

Workday enables you to track both legal and preferred names for people. You enter the legal name when you create a pre-hire, dependent, or beneficiary. When you convert a pre-hire to a worker, you can also enter a preferred name. By default, Workday uses the legal name for the preferred name unless you specify a different preferred name. In that case, Workday tracks the names separately.

Local script name components are available for countries that use a non-Western script. If you enter any name component in local or Western script, you must complete all required fields in that script.

Steps

1. Access the Edit Tenant Setup - System task.

   Decide if you want a worker's legal name, preferred name, or both their legal and preferred name to display throughout Workday and on reports. Select the format:

   - *Long:* Full name format. Example: David Alan Smith.
   - *Reporting:* Last-name-first format. Example: Smith, David Alan.
   - *Short:* Short name format (recommended). Example: David Smith.

   You can only select the Legal and Preferred option on the General Name Display Type prompt. You can use the Name Formats for Country report to view the display formats for a specific country.

   Security: *Set Up: Tenant Setup - System* domain in the System functional area.

   See Reference: Edit Tenant Setup - System.

2. Access the Maintain Name Components by Country task.

   Select the country where you want to configure names.

   On the Name Components tab, select the options you want for name components.

   If you're setting up names for a country with local script name components, there are additional options to select.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
3. Access the Maintain Name Types task.

   Define additional name types, which enables you to search for workers by other names or aliases. To view your additional name types, use the Name Types report.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
4. Access the Maintain Predefined Name Component Values task.

   Define the name prefix or suffix values for a specific country. Example: Dr., Ms., Jr., Sr., III, or PhD.

   The country associated with a person's name determines which components display, their order, and whether they're required. You must set up predefined name component values for the country for the field to be available. You must do this before you can set it to required.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

Next Steps

- To edit a worker's legal or preferred name, select Personal Data > Maintain Names from the worker's related actions menu.

  Note: Employees can update their own names using the Change My Legal Name or Change My Preferred Name tasks.
- To view a worker's Name Change History:
  - In a worker profile, click the Names tab in the Personal profile group.
  - Select Personal Data > Maintain Names from the worker's related actions menu.
- To see a list of name changes for workers in 1 or more organizations, access the Name Change Report.

Related Information

Tasks

Set Up Name Components on page 65

Maintain Name Components by Country on page 145

Create Custom Business Processes

Set Up Name Components

Prerequisites

Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

Context

You can review name components and configure names in your tenant.

Steps

1. Access the Maintain Name Components by Country task.
2. Select the country to configure name components for.

3. Select the Recruiting Name Components tab to set up names only for Workday Recruiting. Select the Name Components tab to set up names for all other functional areas in Workday and for recruiting agencies.
4. Use these options to hide or require name components, or make them optional:
    - *Allowed* to control the component the user interface and web services can collect.
    - *Required* to control the component the user interface enforces.
    - *Required in web services* to control the component web services enforce.
    - *Label Override* to control the descriptive label for a name component. Workday delivers label overrides for name components for each country. You can't change the label override for a required component. You can clear the Allowed check box for a name component and it will no longer be used.
5. Select from these options if you're setting up names for a country that has local script name components:
    - *Enable Western Script check box* to allow your users to override required local script or Western script name components.
    - *Western Script required* to enforce a minimum set of Western script name components.
    - *Local Script required* to enforce a minimum set of local script name components.

Result

Access the View Country report or View Name Components by Country report to view name configurations by country for all functional areas in Workday.

IDs

Steps: Set Up Workday IDs

Context

You can configure different types of Workday IDs based on a sequence generator for pre-hires, employees, contingent workers, dependents, beneficiaries, and academic persons. You can also define a universal ID so you can consistently track a person as they transition through these person types with a single ID:

- Contingent Workers
- Employees
- Pre-hires
- Prospects
- Students

Steps

1. Create ID Definitions and Sequence Generators.

    Configure how Workday automatically generates Workday IDs such as employee IDs, contingent worker IDs, and universal IDs.
2. Access the Edit Tenant Setup - HCM task.

    Select the ID definition for the Workday ID from the applicable prompt in the ID Sequence Generators section.

    See Reference: Edit Tenant Setup - HCM.

    Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

3. (Optional) Access the Edit Tenant Setup - System task.

   Select the ID definition from the ID Definition for Universal Id prompt.

   See Reference: Edit Tenant Setup - System.

   Security: *Set Up: Tenant Setup - System* domain in the System functional area.
4. (Optional) Manually create a universal ID.

   Select Integration IDs > Create Universal Id from a worker's related actions menu.

   Security: *Person Data: Universal ID* in the Personal Data functional area.
5. (Optional) Access the Maintain Custom Labels task.

   Create a different name for universal ids.

   Security: *Custom Label Management* domain in System functional area.

Related Information

Reference

Reference: ID Management on page 70

Steps: Set Up Identification Documents

Prerequisites

Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

Context

Workday enables you to add and track several types of external identification documents and custom IDs such as licenses and passports to comply with local regulatory requirements. You can assign the IDs to:

- Academic persons
- Beneficiaries
- Contingent Workers
- Employees
- Pre-hires
- Students

Steps

1. Access the Maintain Global Identifier Usage Types task.

   Configure the reasons for using IDs such as to establish identity or provide international travel identification.

   When you create ID types, you can associate them with these usage types. You can then report on a specific usage type when you audit for IDs that are about to expire.
2. Access the Create Authority task.

   Configure licensing authorities for countries and country regions. When you edit a person type's ID information, except beneficiaries, you can select the authority that issued the license ID.
3. Create Identification Document Types on page 68.

4. Edit Business Processes.

   Configure business processes and their security policies in the Personal Data functional area.

   - Individual business processes for different ID types:
     - *Edit Government IDs*
     - *Edit ID Information*
     - *Edit Licenses*
     - *Edit Other IDs*
     - *Passports and Visa Change*
   - *Edit ID Information* business process to modify any of the 4 ID types in 1 business process event.

Related Information

Reference

Reference: ID Management on page 70

Workday Community: Global Matrix

Create Identification Document Types

Prerequisites

- Configure reasons for using IDs.
- Configure licensing authorities if you're creating a license ID type.
- Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

Context

You can create different identification document types such as licenses and passports to comply with local regulatory requirements. You can then assign the IDs to:

- Academic Persons
- Beneficiaries
- Contingent Workers
- Employees
- Pre-hires
- Students

Steps

Access these tasks to create different ID types:

- Maintain Additional Government ID Types
- Maintain Custom ID Types
- Maintain License ID Types
- Maintain Passport ID Types
- Maintain Visa ID Types

As you complete these tasks, consider:

Option	Description
ID Definition / Sequence Generator	(Custom IDs only) Select from definitions created on the task for a custom ID type.
Identifier Validation	Indicate whether the ID values for the ID type must be unique:

Option	Description
	• Globally Unique: ID values must be unique across all issuers of the ID type. • Unique to Issuer: ID type values must be unique for a specific issuer, but are reusable by a different issuer. • Leave the field blank to require no ID recurrence validation. Workday issues a warning for duplicate IDs, but you can still save the reused value. If you change the Identifier Validation setting, you could have existing duplicate IDs that violate the new validation.
Global Identifier Usage Type	Associate a usage type for reporting on specific usage types when you audit IDs that are about to expire to establish identity or provide international travel identification.
Maps to	(Additional Government IDs only) Select an ID type to which the government ID maps for the RUP (France) report.
Public	Enable access to custom ID data in a report field secured to a different domain than the domain for a custom ID. Example: If you don't have security access to the *Person Data: Other IDs* domain, but you do have security access to the *Worker Data: Current Staffing Information* domain, select the Public check box to provide access to the custom ID information. For noncustom IDs, the check box delivers a value that indicates if it’s selected. Note: The Public check box doesn't make information public for ID types.

Access an Encrypted National ID

Context

Some countries require that you store their National ID in an encrypted state. Workday complies with encryption requirements by storing data on disk.

When you need an encrypted National ID, Workday can retrieve it and temporarily decrypt the data in an in-memory data cache. You can access the data for a single use and then Workday removes the data from memory.

Steps

1. Access the Schedule National ID Migration task to configure a job to migrate a National ID from a cached to an uncached data state or from an uncached to a cached data state.

   This job creates a copy of an existing National ID. It also purges and deletes the old National ID instance. As a result, the audit history associated with the National ID no longer exists and can't be restored. Following the migration, you can't search for an uncached National ID by value in Workday. This might impact your integrations. Because of this, we recommend that you run the

Schedule National ID Migration task in a sandbox tenant to determine the impact before you run it in a production tenant.

2. Use the Uncached National ID Instance report field to display data about uncached National IDs.

Result

Your decrypted National ID data complies with regulatory requirements, but you can't search for it in Workday by value.

Reference: ID Management

Workday enables you to manage multiple types of IDs for different person types:

- Workers.
- Pre-hires.
- Student prospects.
- Academic affiliates.
- Dependents.
- Beneficiaries.

Workday also enables National ID verification for these self-service person types:

- Academic affiliates.
- Candidates.
- Employees.
- External committee members.
- External students.
- Pre-hires.
- Students.

Note: Users secured to the *Person Data: Add Government IDs* domain in the Personal Data functional area can enter IDs in the *Edit Government IDs* and *Edit IDs* subprocesses of the *Hire* and *Contract Contingent Worker* business processes. Users with access to that domain can't view or modify the ID after they complete the subprocess.

Enable security access to the *Edit ID Information* business process only for users who can edit all 4 of these ID types:

- Government IDs.
- Licenses.
- Other IDs.
- Passports and Visas.

Users with security access to some of these ID types should use the business process specific to the ID type. Example: Use the *Edit Government IDs* business process for Government IDs. If a user without access to all 4 ID types edits 1 or more of them, Workday deletes the IDs the user can't access.

To maintain and view IDs for different person types, access these tasks:

For Workers, Pre-Hires, and Academic Affiliates:

Action	Access
Enter and update IDs.	• Edit Government IDs task. • Edit Licenses task.

Action	Access
	• Edit Passports and Visas task. Security: *Person Data: Personal Photo* and *Self-Service: Personal Photo* domains in the Personal Data functional area. • Edit ID Information for Pre-Hire task. Security: *Pre-Hire Person Data: ID Information* domain in the Pre-Hire Process functional area.
View IDs.	• ID Information report. Security: *Person Data: ID Information*, *Person Data: Government IDs*, *Person Data: Passports and Visas*, *Person Data: Licenses*, and *Person Data: Other IDs* domains in the Personal Data functional area. *Worker Data: I-9 Forms* in the Onboarding functional area. • Pre-Hire ID Information report. Security: *Pre-Hire Personal Data: ID Information* domain in the Pre-Hire Process functional area.
Track expiring or duplicate IDs.	• Expiration Dates for Worker IDs report. Security: *Audit: Worker IDs* domain in the Personal Data functional area. • Workers with the Same National ID report. Security: *Person Data: Government IDs* domain in the Personal Data functional area.
Identify invalid IDs.	Workers with Invalid National IDs report. Security: *Person Data: Government IDs* domain in the Personal Data functional area.

For Student Prospects:

Action	Access
Enter IDs.	Create Student Prospect task. Security: *Manage: Student Prospect* domain in the Student: Recruiting functional area.
Update IDs.	IDs report on the Personal profile group of the prospect profile.

For Dependents and Beneficiaries:

Action	Access
Enter and update IDs.	On the profile of the worker with a beneficiary or dependent, select either View Beneficiaries or View Dependents report on the Benefits profile group.

Action	Access
	Security: *Worker Data: Beneficiaries and Dependents* domain in the Benefits functional area and the Personal Data functional area.

For Workers, Contingent Workers, Pre-Hires, Students, and Student Prospects:

Action	Access
Enter and update IDs.	Select Integration IDs > Create Universal ID. Select Integration IDs from the person's related actions menu. Security: *Person Data: Universal ID* domain in the Personal Data functional area.

For Academic Affiliate, Candidate, Employee, External Committee Member, External Student, Pre-Hire, and Student:

Action	Access
Verify National ID	To access the Verify National ID button, on a person's profile, select Personal and IDs. Security: *Self-Service: Verify National ID* domain in the Personal Data functional area.

Example: Restrict a National ID Length

This example illustrates 1 way to restrict the number of digits that users can enter for a national ID.

Context

Workday enables you to enter 10 or 12 digits for the Swedish national ID, Personnummer. You want to restrict the ID length so that users must enter 12 digits. You create a condition rule on the *Edit ID Information* business process using calculated fields to extract the Personnummer ID length.

Prerequisites

Security: *Custom Field Management* in the System functional area.

Steps

1. Access the Create Calculated Field task.
2. Enter these values:

Field	Value
Field Name	CF National ID is Personnummer ID
Business Object	*National Identifier*
Function	*True/False Condition*

3. Click OK.

4. Enter these values:

Field	Value
Field	*National Identifier*
Operator	*in the selection list*
Comparison Type	*Value specified in this filter*
Comparison Value	*Personal ID Number (Personnummer)*

5. Click OK, then click Create Another Calculation.
6. Enter these values:

Field	Value
Field Name	CF Proposed Personnummer on Composite ID Event
Business Object	*Composite Identifier Event*
Function	*Extract Single Instance*

7. Click OK.
8. Enter these values:

Field	Value
Source Field	*National IDs - Proposed*
Condition	*CF National ID is Personnummer ID*
Sort Field	*Current Entry Date*
Sort Direction	*Descending (Z to A)*
Instance to be returned	*First occurrence*

9. Click OK, then click Create Another Calculation.
10. Enter these values:

Field	Value
Field Name	CF Unformatted Personnummer on Composite ID Event
Business Object	*Composite Identifier Event*
Function	*Lookup Related Value*

11. Click OK.
12. Enter these values:

Field	Value
Lookup Field	*CF Proposed Personnummer on Composite ID Event*
Return Value	*National ID Unformatted*

13. Click OK, then click Create Another Calculation.

14. Enter these values:

Field	Value
Field Name	CF Proposed Personnummer Length on Composite ID Event
Business Object	*Composite Identifier Event*
Function	*Text Length*

15. Click OK.
16. On the Text Field prompt, select *CF Unformatted Personnummer on Composite ID Event*.
17. Click OK and click Done.
18. Select Business Process > Create Condition Rule from the related actions of the initiation step on the *Edit ID Information* business process.
19. Create a condition rule with these 2 conditions:

Field	Rule Condition 1	Rule Condition 2
Description	Personnummer ID	Personnummer ID Length
Source External Field or Condition Rule	*National ID Type - Proposed*	*CF Proposed Personnummer Length on Composite ID Event*
Relational Operator	*any in the selection list*	*equal to*
Comparison Type	*Value specified in this filter*	*Value specified in this filter*
Comparison Value	*Personal ID Number (Personnummer)*	*10*

20. Click OK.

Next Steps

- Configure custom validation text for the initiation step on the *Edit ID Information* business process.
- You can also restrict the Personnummer national ID length on the *Edit Government IDs* business process by creating:
  - Similar calculated fields based on the Government Identifier Event business object.
  - A similar condition rule on the initiation step of the *Edit Government IDs* business process.

Related Information

Tasks

Steps: Set Up Identification Documents on page 67

Contact Information

Steps: Set Up Contact Information

Prerequisites

Set up 1 or both of these business processes:

- *Contact Change* to manage contact information updates in 1 task.
- *Home Contact Change* and *Work Contact Change* to manage contact information updates in 2 parallel tasks.

Set up the domain security policies in the Contact Information functional area. Set up the security policies on the business process.

Context

You can set up the *Contact Change* business process to add, edit, or delete contact information for workers.

You can set up the *Home Contact Change* and *Work Contact Change* business processes to add, edit, or delete contact information for these people:

- Workers
- Students
- External Committee Members

Using these business processes requires you to disable the security policies on the *Contact Change* business process.

Steps

1. Access the Maintain Localization Settings task.

   Identify which countries use certain contact information localizations.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.

   See Reference: Contact Information Localizations on page 78.
2. Steps: Set Up Address Components by Country on page 79.
3. Steps: Set Up Phone Numbers on page 90.
4. Access the Maintain Instant Messenger Types task.

   Define the available instant messenger providers.

   - Providers listed in the Integration Action prompt have an active link to launch the application.
   - Providers that have no Integration Action display as plain text in contact information displays.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
5. Access the Maintain Social Network Types task.

   Define which social networks are available by country.

   Add links to social network accounts in these formats:

Social Network	Required Format
Facebook	http(s)://*.facebook.com/profile.php?id=
Google+	http(s)://plus.google.com/<number>/
IBM Connections	URL of the user account
LinkedIn	http(s)://*.linkedin.com/profile/view?id= http(s)://*.linkedin.com/pub/ http(s)://*.linkedin.com/in/
Twitter	Username (no URL)
XING	http(s)://www.xing.com/profile/
Yelp	http(s)://www.yelp.com/user_details?userid=

   Note: Social network icons are active links. LinkedIn™ displays a preview card in Workday, while all other profiles launch in new pages.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
6. Configure the *Manage Social Networks* business process in the Contact Information functional area.

7. Configure the *Change Emergency Contacts* business process and security policy in the Personal Data functional area.
8. Use the Maintain Related Person Relationships task to specify relationships between people.
9. (Optional) Edit contact information for a person. Select Personal Data from the related actions menu of their profile and then select the relevant task:
    - Change Contact Information
    - Social Network
    - Change Home Contact Information
    - Change Work Contact Information
    - Edit Pre-Hire Contact Information

    Once you enter a primary home address for a worker, you can change or share it, but you can't delete the address entry.

    When you enter an Alternate Work Location on the *Work Contact Change* business process, Workday displays the current date as the effective date. When you enter a different effective date, Workday uses the last effective date entered for all addresses that the Work Contact Change event updates.

Result

Workers can edit their own contact information in the Personal Information worklet. To provide access to the self-service tasks:

- Add *Employee as Self* to initiating actions for the *Contact Change, Home Contact Change, Work Contact Change,* and *Manage Social Networks* business processes.
- Add *Employee as Self* to the *Self-Service: Home Contact Information* and *Self-Service: Work Contact Information* security domains.
- Use the Configure Worklet task to add the Contact Information and Social Networks actions to the Personal Information worklet.

Related Information
Concepts
Concept: Country-Specific Information, Locales, and Languages
Tasks
Edit Personal and Contact Information for Pre-Hires on page 627
Steps: Set Up Companies
Manage Personal Relationship Types on page 1498
Reference
Workday Community: Global Matrix – Country Support for Workday
Workday Community: Name and Address Formats
Reference: Edit Tenant Setup - Global
Reference: Phone Number Formats on page 91

Concept: Access to Worker Information

You can secure access to worker names, contact information, and personal information through a combination of domain and business process security policies. You can constrain access by organization context.

- Domain security policies determine who can view or modify each type of worker information in business processes, tasks, related actions, worker profiles, and reports. To manage permissions, use the Domain Security Policies for Functional Area report.
- Business process security policies determine who can perform actions in the *Contact Change*, *Home Contact Change*, *Work Contact Change*, *Personal Information Change*, *Legal Name Change*, and *Preferred Name Change* business processes. To manage permissions, use the Business Security Policies for Functional Area report.

- Role-based security groups limit access to secured items (such as reports, tasks, and data) to members of specific organizations.

Worker Profiles

To view personal and contact information on worker profiles, set up domain security:

Section	Domains	Notes
Contact Information	*Person Data: Home Contact Information* *Person Data: Work Contact Information* *Self-Service: Home Contact Information* *Self-Service: Work Contact Information*	When you disable these security policies, you can't see the Contact section of the worker profiles.
Personal Information	*Person Data: Personal Information* *Self-Service: Personal Information*	When you disable these security policies, you can't see the Personal Information section of the worker profiles. The *Self-Service: Personal Data* and *Person: Personal Data* parent domains don't provide access to personal information, but can be used for subdomains to inherit permissions.

Public and Private Contact Information

You can designate each type of contact information (except home addresses) as public or private. The designation only affects the visibility of contact information on worker profiles and worker preview cards. Anyone with view permission on the *Worker Data: Public Worker Reports* domain can see public contact information on worker profiles and worker preview cards.

A worker's home address is always private unless it's also their work address, in which case you can make the home address public.

For broader access to contact information, you must have permission on the *Person Data: Work Contact Information* and *Person Data: Home Contact Information* domains. These domains provide access to both public and private contact information in these places:

- Change Contact Information, Contact Information, and Work Contact Information for Worker standard reports.
- Change Contact Information and View Contact Information related actions on workers.
- Worker Contact tab on worker profiles.

Workday recommends that you limit permission on these domains to administrators. Don't assign the *All Users*, *All Employees*, *All Contingent Workers*, *All Retirees*, or *All Terminees* security groups to the *Person Data: Work Contact Information* and *Person Data: Home Contact Information* domains if you want to restrict visibility of private contact information.

Note: You can further restrict access to worker information by creating an intersection security group. This group enables only administrators or specific organization roles to view directory information. It also excludes workers from search results, organization profiles and charts, and reports.

Security Permissions

Workers secured to actions in the *Contact Change*, *Home Contact Change*, *Work Contact Change*, *Personal Information Change*, *Legal Name Change*, and *Preferred Name Change* business processes need these domain security permissions to view and modify data in the business processes:

- Groups assigned to the initiation or review steps in the business processes require modify permission on the domains that control access to each type of information.
- Groups with view all, view completed only, approve, cancel, or rescind permission in the business processes require view permission (at a minimum) on the domains that control access to each type of information.

Access the Template-Driven Business Process Security report to confirm that the business process and domain security permissions are aligned.

Related Information
Tasks
Steps: Set Up Profiles and Profile Groups
Create Intersection Security Groups
Edit Business Process Security Policies
Edit Domain Security Policies
Create Role-Based Security Groups

Reference: Contact Information Localizations

Workday enables you to specify which countries use different contact information localizations.

Localized Field	Description
City Prompt	Enables you to select from a Workday-maintained list of cities for the selected countries. Note: We recommend that you contact Professional Services for assistance when activating this localization, which significantly impacts your data, existing integrations, EIBs, and web services. When you activate City Prompt, Workday prevents you from entering city names as text for the selected countries. If you later inactivate the City Prompt, you must re-enter all cities for which you selected an address using the prompt.
Country Names	Enables custom names for countries. Note: Activating this localized field for any country is a significant tenant change and requires additional setup in the Maintain Workday Delivered Country Names task. Workday displays custom country names based on the country of the primary position. Example: If you activate this localized field for Hong Kong, workers in your organization with a primary position within Hong Kong see the custom names you configured in the Maintain Workday Delivered Country Names task for Hong Kong.
Enable Address Lookup	Enables you to search for an address based on address components such as Postal Code.

Localized Field	Description
Number of Days (Worker)	Enables you to track the number of days a worker in the selected country works from home. If you activate this localized field, you can track both the Number of Days Per Week and the Days of the Week in a worker's home contact information. Once enabled, access the Maintain Address Usages task and activate the Work From Home address usage as the default for Communication Usage Behavior Default to use and display these fields.

Related Information

Tasks

Steps: Set Up Contact Information on page 74

Steps: Set Up Custom Names for Countries

Steps: Set Up Core Connector: Location Integration

Addresses

Steps: Set Up Address Components by Country

Context

You can enable, hide, or require address components by country in your tenant.

Steps

1. Access the Maintain Address Components by Country task.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
2. Select a country to configure address components for it.
3. Select the Address Components tab to configure addresses for all functional areas in Workday other than Recruiting.
4. (Optional) Include additional address components when you enter or update address information that displays when you edit a home or work address.

   Note: When you edit additional address components and submit the changes, those changes are saved, but don't display on the UI. Example: When you edit the home address of a worker, the changes don't display on the worker profile. You can see the changes when you edit the worker's home address.
5. As you complete the task, consider:

Option	Description
Allowed	Select the check box to enable the relevant address component.
Required	Select the check box to require the relevant address component.
Enforce Required in Web Services	If you require an address component, select this check box to include this component in the relevant web services.

Option	Description
Label Override	Workday delivers label overrides for address components for each country and uses the override as the descriptive label for the component. You can't change the label override for a required component. You can clear the Allowed check box for an address component and it will no longer be used.

6. As you complete the task for a country with local script address components, consider:

Option	Description
Enable Enter Western Script Check Box	This option enables you to: • Enter the required local script address components that display by default. • Select the Enter Western Script check box. When you select it, you can enter either local or Western script address components, but Western are required.
Western Script Required	This option enables you to enter only Western script address components.
Local Script Required	This option enables you to enter only local script address components.

Some address components are always required and you can't configure them. The required components vary by country. Example: For Canada, the required components are: *Address Line 1*, *Region*, and *Postal Code*. For Japan, the required components are: *Postal Code*, *City*, and *Address Line 1*. For the United States, the required components are: *Address Line 1*, *City*, *Region*, and *Postal Code*.

7. (Optional) Use the directional arrows to configure the display order of address components in tasks where you enter address data, and in the View Address Components by Country report.
8. (Optional) Ensure consistency of address components in Workday and web services:
   a) Access the View Address Component Configuration Sync report to identify address components that aren't in sync with hidden or additional address components.
   b) Review and resolve any inconsistencies identified in the report.
   c) Submit configuration changes on the Maintain Address Components by Country task.
   d) Opt in to Address Component Sync for Get Web Services on the Maintain Feature Opt-Ins report to sync address components with web services.

Next Steps

Use the View Address Components by Country report to view your address component configurations.

Related Information

Reference

Reference: Edit Tenant Setup - Global

2023R1 What's New Post: Configurable Addresses by Country

Set Up Global Address Lookup

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

Workday enables you to enter a small portion of an address, such as a postal code or street name, to retrieve possible matching addresses in a selected country or territory.

Steps

1. Access the Enable Innovation Services Feature and AI Data Contributions for MSA Customerstask.

   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.

   On the Innovation Services Opt-In task, select the Global Address service on the Available Services tab in the Global Address category.
2. Access the Maintain Localization Settings task.

   Security: *Set Up: Tenant Setup - Global* in the System functional area.

   a) Access the Contact Information area.
   b) Select Global Address Lookup Using Third-Party Services and select the countries or territories to enable for address lookup. Workday supports address lookup for more than 200 countries and territories. You can enable it for most countries and territories except for Google maps prohibited territories. For each country or territory, we map vendor address data to a Workday address component. We provide a default mapping for every country and territory. Your can customize how address fields are autofilled with vendor data using the Maintain Address Components by Country task. See Set Up Address Autofill.
3. (Optional) Access the Change Home Contact Information task or the Change Work Contact Information task.

   Security:*Person Data: Personal Photo* and*Self-Service: Personal Photo* domains in the Person Data functional area.

   In the Country field, select a country or territory that has Global Address Lookup enabled. The Search Address powered by Google field displays. Enter some portion of an address to retrieve possible matches.

Result

When you select an address returned by address lookup, Workday populates some address component fields, overwriting any existing information.

Countries and territories supported by Global Address Lookup may vary in time, and support for certain countries may be added or removed.

Related Information
Reference
2022R1 What's New Post: Address Lookup for the United Kingdom

Set Up Address Autofill

Prerequisites

Access the Maintain Localization Settings task to enable either:

- Global Address Lookup
- Global Address Validation

Activate 1 of these features for a county to have the Vendor Address Components column display in the Maintain Address Components by Country task.

Context

You can configure how an address is autofilled by vendor data by changing the vendor address component assignment.

Steps

1. Access the Maintain Address Components by Country task and select a country.

   Security: *Set Up: Contact Info, IDs, and Personal Data* in the Personal Data functional area.
2. View the default mapping of vendor address components for the country.
3. If Address Lookup is active for the selected country, search for and select an address in the Address Preview field. If only Address Validation is active for that country, enter an address.
4. View how address information is autofilled in the Workday address fields.
5. To change the displayed address configuration, map vendor address components to Workday address components. Example: For the United States, Subpremise Number displays on Address Line 1 in the default mapping, but you want it to display on Line 2. Remove Subpremise Number from Line 1 in the Vendor Address Component column and select it to map it to Line 2 in the Component column. Click Refresh Address Preview to view your changes.

Result

Configurable address autofill enables you to accurately capture an address as you enter it, which helps ensure consistency of address data.

Set Up Global Address Validation

Prerequisites

Determine if you need to access the Innovation Services Opt-In task to enable this feature. See Set Up Global Address Lookup.

Context

Workday validates an address upon entry. You receive an alert if the address isn't an officially recognized postal address.

Steps

1. Access the Maintain Localization Settings task, Contact Information Area, to enable Global Address Validation by country or territory.

   Security:*Set Up Tenant Setup - Global* in the System functional area.
2. Select the Enter Western Script check box to enable address validation for countries that use a local script.
3. (Optional) Once enabled, observe how address validation works by entering an address in a task where we capture address information. Example: Access the Change My Home Contact Information task and enter a home address in all required fields.

   Workday validates the address and displays an alert when the address needs a correction. When possible, a matching valid address displays that you can use to overwrite the incorrect address fields. When Workday can't suggest a matching valid address, an alert displays. You can attempt to validate an address 5 times.
4. (Optional) Initiate a review or approval step when you submit an invalid address as part of a business process.

   Access the business process definition of any Contact Change event and select these options:
   a) Type = Approval or Review
   b) Optional = No
   c) Group = groups that the business process routes to
   d) Do not Advance = No
5. Access the Related Actions near the magnifying glass and select the *Maintain Step Conditions* business process.
6. Click + to add an entry condition. Select Create Condition Rule.
7. Add these options for the condition rule:
   a) Description. Example: If address entered isn’t valid, route to HR Partner.
   b) And/or = And
   c) -(= leave empty
   d) Source External Field or Condition Rule = Contact Change Event has Invalid Address
   e) Relationship Operator = equal to
   f) Comparison Type = Value specified in this filter
   g) Comparison Value is checked
8. Click Done.

Result

Once enabled in your tenant, this feature validates addresses for candidates, students, and workers.

Countries and territories supported by Global Address Validation may vary in time, and support for certain countries may be added or removed.

Reference: Countries Supported for Global Address Validation

We support these countries using Google as an Address Service Provider:

- Argentina
- Australia
- Belgium
- Brazil
- Chile
- Colombia
- Croatia
- Czechia

- Denmark
- Estonia
- Finland
- France
- Germany
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malaysia
- Mexico
- Netherlands
- New Zealand
- Norway
- Poland
- Portugal
- Puerto Rico
- Singapore
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- United States of America

We support these countries using Melissa as an Address Service Provider:

- Albania
- Algeria
- Andorra
- Angola
- Austria
- Bahamas
- Bangladesh
- Barbados
- Belarus
- Benin
- Bermuda
- Bolivia
- Bosnia and Herzegovina
- Botswana
- Bulgaria
- Burkina Faso
- Burundi
- Cameroon
- Canada
- Cayman Islands
- Chad
- China

- Congo
- Costa Rica
- Cuba
- Cyprus
- Djibouti
- Dominican Republic
- Ecuador
- El Salvador
- Eritrea
- Falkland Islands
- Faroe Islands
- Fiji
- Gibraltar
- Greece
- Guadeloupe
- Guam
- Guatemala
- Guernsey
- Haiti
- Honduras
- Hong Kong
- Iceland
- Isle of Man
- Israel
- Jamaica
- Jersey
- Kazakhstan
- Kenya
- Libya
- Liechtenstein
- Macao
- Malta
- Martinique
- Mauritius
- Mayotte
- Moldova
- Monaco
- Montenegro
- Morocco
- Mozambique
- Namibia
- Nigeria
- Panama
- Paraguay
- Peru
- Philippines
- Romania
- San Marino
- Senegal
- Serbia

- Sierra Leone
- South Africa
- Suriname
- Taiwan
- Tanzania
- Togo
- Trinidad and Tobago
- Tunisia
- U.S. Virgin Islands
- Uganda
- Ukraine
- United Arab Emirates
- United Kingdom
- Uruguay
- Venezuela
- Zambia
- Zimbabwe

Countries supported by Global Address Validation may vary in time, and support for certain countries may be added, removed, or provided by another current Address Service Provider.

Reference: Address Usages

Address usages track the purpose for an address. Example: Billing, Mailing, Shipping, and so on. Workday delivers several address usages and corresponding mapping values that you can configure using the Maintain Address Usages task.

You can rename an address usage or create a new one in the Address Usages column of the Maintain Address Usages task. You can map the new or modified address usage to the Workday-delivered values in the Communication Usage Behavior Default column. You can select Default to make the new or modified address usage the default behavior for the address usage. You can also restrict an address usage to specific countries.

The mapping values determine which address usages are available for selection when you enter or edit an address. Example: When you create a Corporate Billing address usage, you can map it to the Billing value. Corporate Billing then displays as an option on the Usage prompt when you enter or edit a business address. It's not an option if you enter or edit a home address.

Address usages and address types can be useful for tracking and reporting purposes. Workday provides 6 address types that you can associate with address usages. The combination of address usage and address type indicates the purpose of the address. Example: If your company has several addresses for a supplier business, you can track which address is for billing and which is for shipping. Example: You can associate the Payroll Tax Form usage with the home and work address types for tax reporting purposes. See: Steps: Add Worker Tax Elections (USA).

You can link a single address type to several different usages. Example: A person's home address can have a type of international assignment, mailing, other - home, or permanent address, but not procurement. You can select an address usage in the Usage or Use For prompt when you enter or edit the corresponding address types:

Address Usage	Address Type
Billing	Academic Contact Business Home Institutional

Address Usage	Address Type
	Work
International Assignment	Home
Lockbox	Lockbox
Mailing	Academic Contact Business Home Institutional Work
Mileage Calculation	Home Work
Other - Business	Business
Other - Home	Home
Other - Work	Work
Paycheck	Home Work
Payroll Tax Form	Home Work
Permanent	Home Institutional
Procurement	Business
Remit To	Business
Shipping	Business Home Institutional Work
Storage	Business Work
Street Address	Academic Contact Business Home Institutional Work
Student Refund	Home Institutional
Tax Reporting	Business

Address Usage	Address Type
Work From Home	Home

Workday determines which address types are valid for different business objects. The association of address type to business object also indicates which address usages are appropriate for a business object. Example: An educational institution can have an academic contact address, but not a home or work address. Similarly, a student can have an address type of home or institutional, but not one for business or lockbox. These business objects can have these address types:

Address Type	Business Object
Academic Contact	Educational Institution External Association Student Recruiting Event Ad Hoc Location
Business	Ad Hoc Payee Authority Benefit Provider Business Entity Business Entity Contact Info Change Business Site Corporate Credit Card Account Miscellaneous Payee Professional Affiliation Recruiting Agency Requisition Service Center Subaward Contact Supplier Change Supplier History
Home	Beneficiary Trust Person Professional Affiliation Student Subaward Contact
Institutional	Student
Lockbox	Lockbox
Work	Ad Hoc Payee Beneficiary Trust Person Professional Affiliation Student

Address Type	Business Object
	Subaward Contact

The Business Entity and Person business object groups contain business objects. The contained business objects have the same address types as their business object group. Example: A pre-hire can have a home address and a work address because the Person business object can have a home address and a work address.

Business Object Group	Business Object
Business Entity	Bank Branch Company Customer Deduction Recipient Donor Financial Institution Investor Prospect Sponsor Supplier Tax Authority
Person	Academic Affiliate Beneficiary Candidate Committee Member Dependent Emergency Contact Former Worker Pre-Hire Student Student Prospect Service Center Representative Worker

Related Information

Tasks

Steps: Set Up Address Components by Country on page 79

Phone Numbers

Steps: Set Up Phone Numbers

Context

You can configure what kinds of phone devices and numbers workers can select and enter for your Workday tenant.

Steps

1. Access the Maintain Phone Device Types task.

   Set the available phone device types you can use to enter or update contact information in Workday. Phone number validations are available for mobile and landline device types, but not VoIP device types. If you've enabled the Recruiting functional area, you can also select device types to exclude from Recruiting phone numbers.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
2. Access the Edit Tenant Setup - System task.
   a. Set the default phone number view format to control how phone numbers display in your tenant.
   b. (Optional) Select the Include National Prefix check box to include the national prefix, such as zero, with the area code. If you select this setting, the national prefix displays in all web services that use an area code. This setting affects new phone numbers that you save in the Workday Traditional Phone Format, and any phone numbers that you later edit. The setting doesn't affect phone numbers that use E164, International, or National formats. Workday recommends selecting this setting only once.
3. (Optional) Access the Edit Tenant Setup - Global task.

   Enable phone number validations by country to have Workday validate phone numbers. If you select this setting, Workday won't accept invalid phone numbers. When necessary, Workday has defined separate validations for mobile and landline types of phone numbers.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.
4. (Optional) Access the Invalid Phone Numbers report.

   View invalid phone numbers for workers.

   You can use an EIB based on the Maintain Contact Information web service to correct invalid phone numbers or incorrectly formatted phone numbers. Make sure that you include the Country ISO Code (Alpha-3). Workday automatically assigns the correct Country Phone Code after you load the EIB.

   Security: *Audit: Contact Information* domain in the Contact Information functional area.

Related Information
Reference

Reference: Edit Tenant Setup - Global

Reference: Edit Tenant Setup - System

Reference: Phone Number Formats on page 91

Workday 31 What's New Post: Single Field Phone Number

Workday Community: Incorrect Phone Number Formatting

Concept: Entering and Validating Phone Numbers

Workday has required fields for both Country Phone Code and Phone Number. After you enter the phone number, Workday:

- Validates the phone number for a country, if you select Allowed Phone Validations in the Edit Tenant Setup - Global task.
- Automatically formats a valid phone number for a country in the format selected in the Phone Number View Format setting in the Edit Tenant Setup - System task.

Workday uses the Google libphonenumber library to validate and format phone numbers. If you enter an invalid phone number, Workday doesn't format it and displays the number as entered. If the phone number digits are valid, Workday automatically formats the number based on the Country Phone Code.

Access the View Sample Phone Number Library report to see the allowed number of digits in phone numbers for different countries. You can also view sample phone numbers for different countries in the report. It includes fixed line and mobile numbers in these formats:

- International Phone Number
- National Phone Number

Reference: Phone Number Formats

Workday displays phone numbers in your tenant based on the selected Phone Number View Format setting in the Edit Tenant Setup - System task.

Workday supports 4 phone number formats. International is the default format. These examples display the differences in the formats:

Country	Workday Traditional Phone Format	E164	International	National
USA	+1 (925) 2006574	+19252006574	+1 925-200-6574	(925) 200-6574
United Kingdom	+44 (7974) 424832	+447974424832	+44 7974 424832	07974 424832
Japan	+81 (90) 17901357	+819017901357	+81 90-1790-1357	090-1790-1357
France	+33 (6) 86579014	+33686579014	+33 6 86 57 90 14	06 86 57 90 14

You can export a list of all phone number formats using an outbound Enterprise Interface Builder (EIB) integration.

Related Information
Tasks

Steps: Set Up Outbound EIB

Reference

Reference: Edit Tenant Setup - System

Vaccination and Workplace Test Tracking

Set Up Vaccination Tracking

Prerequisites

Security: *Person Data: Vaccination Setup* domain in the Vaccination Tracking functional area.

Context

You can specify the vaccination types, status, and manufacturers for your workers as part of your disease preparedness and control plans.

Once users have entered vaccination data, any changes you make on the Vaccination Tracking Setup report might impact that data.

Steps

1. Access the Vaccination Tracking Setup report.
2. As you configure vaccine types, consider:

Option	Description
Order	Specify the order in which Workday displays the values in the Vaccine Type prompt on these tasks: • Add My Vaccination • Add Vaccination
Vaccination Type Name	Enter the name of the disease that the vaccination is providing immunity against.
Inactive	Select to inactivate the type. Users won't be able to select the type when adding vaccinations. You might have downstream impacts if there's existing vaccination data.
In Use	Workday automatically selects this check box when someone uses the Vaccine Type in a worker's vaccination record.

3. As you configure vaccination statuses, consider:

Option	Description
Order	Specify the order in which values display on these tasks: • Add My Vaccination • Add Vaccination
Vaccination Status Name	Enter the status of the worker's vaccination. Example: • *Vaccinated* • *Not Applicable - Medical Exemption*
Valid for Vaccine Types	Enter the vaccine types the vaccination status applies to. Workday displays this vaccination status when workers enter vaccinations for the selected vaccine type.
Attestation	Enter custom text that workers view when they verify to their vaccination status.
Collect Vaccination Details	Select to display a Vaccination Details section where workers can enter the manufacturer, vaccination event type, and date on these tasks: • Add My Vaccination • Add Vaccination

Option	Description
Fully Vaccinated	Select to mark the worker as Fully Vaccinated when they select this Vaccination Status on these tasks: • Add My Vaccination • Add Vaccination
Inactive	Users won't be able to select the status when adding vaccinations on these tasks: • Add My Vaccination • Add Vaccination You might have downstream impacts if there's existing vaccination data.
In Use	Workday automatically selects this check box when someone uses the Vaccination Status in a worker vaccination record.

4. As you configure vaccination event types, consider:

Option	Description
Order	Specify the order in which Workday displays vaccination event types on these tasks: • Add My Vaccination • Add Vaccination
Vaccination Event Type Name	Enter the type of vaccination event workers can select when entering their vaccination. Example: *First Dose*.
Valid for Vaccine Types	Enter the vaccine types the vaccination event type applies to. Workday displays this vaccination event type when workers are entering vaccinations for the selected vaccine type.
Inactive	Select to inactivate the event type. Users won't be able to select the type when adding vaccinations on these tasks: • Add My Vaccination • Add Vaccination You might have downstream impacts if there's existing vaccination data.
In Use	Workday automatically selects this check box when someone uses the Vaccination Event Type in a worker vaccination record.

5. As you maintain vaccine manufacturers, consider:

Option	Description
Vaccine Manufacturer Name	Workday displays the manufacturer on these tasks: • Add My Vaccination

Option	Description
	• Add Vaccination
Inactive	Select to inactivate the vaccine manufacturer. Users won't be able to select the type when adding vaccinations. You might have downstream impacts if there's existing vaccination data.
In Use	Workday automatically selects this check box selected when someone uses the Vaccine Manufacturer in a worker vaccination record.

6. Configure your vaccine tracking requirements using the selections that you created.

   Select Vaccine to display the Maintain Vaccines task.
7. As you complete the task, consider:

Option	Description
Vaccine Type	Select the relevant type that you created.
Vaccine Manufacturer	Select the relevant manufacturers that you created.
Selectable Vaccination Event Type	Enter the event types that you want workers to be able to select for the vaccine.
Inactive	Select to inactivate the vaccine. Users won't be able to select the type when adding vaccinations. You might have downstream impacts if there's existing vaccination data.
In Use	Workday automatically selects this check box when someone uses the Vaccine in a worker vaccination record.

Example

You want to support workers as they return to the workplace after COVID-19. You create these values for workers to select when adding vaccinations:

Option	Value
Vaccine Type	*COVID-19*
Vaccination Status	*Vaccinated* *Partially Vaccinated* *Not Vaccinated* *Other* Enter the attestation: *I certify the information that I provided is true and correct to the best of my knowledge.*
Selectable Vaccination Event Type	*Single Dose* *First Dose* *Second Dose* *First Booster*

Option	Value
	Second Booster
Vaccine Manufacturer	*AstraZeneca* *Johnson and Johnson* *Moderna* *Pfizer*
Vaccine	*Moderna*, with these selectable event types: • *First Dose* • *Second Dose* • *First Booster* • *Second Booster* *Pfizer*, with these selectable event types: • *First Dose* • *Second Dose* • *First Booster* • *Second Booster* *AstraZeneca*, with these selectable event types: • *First Dose* • *Second Dose* • *First Booster* • *Second Booster* *Johnson and Johnson*, with these selectable event types: • *Single Dose* • *First Booster* • *Second Booster*

Next Steps

Configure the *Add Vaccination* business process.

You can report on workers who are *Fully Vaccinated*, and create condition rules that includes or excludes them.

Use the Configure Worklet task to add the My Vaccination task as an option on the Personal Information worklet. The option displays as Vaccination Status on the worklet.

Related Information

Reference

2021R2 What's New Post: Vaccination and Workplace Test Tracking

The Next Level: Vaccination Tracking

Set Up Workplace Test Tracking

Prerequisites

Security: *Person Data: Workplace Testing Setup* domain in the Workplace Test Tracking functional area.

Context

You can set up different workplace health and safety tests for your organization. This can help you with reacting to different regulations. Example: Covid-19 Tests.

Steps

1. Access the Workplace Test Tracking Setup report.
2. As you configure workplace test types, consider:

Option	Description
Workplace Test Type Name	Enter what the workplace health and safety test is checking for. Example: • *COVID-19* • *Measles*
Inactive	Users won't be able to select the type when adding workplace tests. You might have downstream impacts if there's existing workplace test data.
In Use	Workday automatically selects this check box when someone uses the Workplace Test Type in a workplace test record for a worker.

3. As you maintain workplace test results, consider:

Option	Description
Workplace Test Result Name	Enter the types of results workers can receive from their workplace health and safety test. Example: • *Pending Results* • *Negative* • *Positive*
Attestation	Enter custom text that workers view when they verify to their workplace test results.
Inactive	Users won't be able to select the result when adding their workplace tests. You might have downstream impacts if there's existing workplace test data.
In Use	Workday automatically selects this check box when someone uses the Workplace Test Result in a workplace test record for a worker.

Example

You want to support workers as they return to the workplace after COVID-19. You create these values for workers to select when adding workplace tests:

Option	Value
Workplace Test Types	*COVID-19*
Workplace Test Results	*Pending Results* *Positive*

Option	Value
	Negative *Not Applicable* Enter the attestation: *I certify the information that I provided is true and correct to the best of my knowledge.*

Next Steps

Configure the *Add Workplace Test* business process.

Use the Configure Worklet task to add the My Workplace Test task as an option on the Personal Information worklet. The option displays as Workplace Test Result on the worklet.

Related Information
Reference

2021R2 What's New Post: Vaccination and Workplace Test Tracking

The Next Level: Workplace Test Tracking

Steps: Configure the Add Vaccination Business Process

Prerequisites

Security: The *Person Data: Vaccination* domain in the Vaccination Tracking functional area.

These domains in the System functional area:

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

Context

You can configure the *Add Vaccination* business process to track worker vaccinations. You have the flexibility to react to health and safety concerns in the workplace. Example: You require workers to get vaccinated against Covid-19 before they return to the office.

Steps

1. Edit Business Process Security Policies.

   Select the *Vaccination Tracking* functional area and add the appropriate security groups.
2. Edit Business Processes.

   Configure the *Add Vaccination* business process as a subprocess of the *Onboarding* business process.
3. (Optional) Hide or Require Optional Fields.

   Configure these fields on the Add Vaccination and Add My Vaccination tasks:

Option	Description
Vaccination Event Type	When you hide this field, users can still view and enter values in the Vaccine field.
Vaccine	When you hide this field, users can't enter values in the Vaccination Event Type field.

   Example: You hide both the Vaccination Event Type and Vaccine fields so that you can only track the vaccination status and vaccination date for workers.

4. (Optional) Create Security Rules.

   From the Security Field prompt, select *Fully Vaccinated*.
5. (Optional) Create Custom Labels.

   Select *HR Compliance* from the Term Context prompt.

Result

Users can add vaccinations for themselves or for workers using the *Add Vaccination* web service, and these tasks:

- Add My Vaccination
- Add Vaccination

Next Steps

- Add the Vaccinations report to the Personal for Worker Profile profile group. This profile report enables you to view all vaccinations for a worker.
- You can create custom reports for worker vaccine events using the indexed *Vaccinations* report data source.
- You can use the *Get Vaccinations* web service to retrieve vaccination data in bulk from Workday.
- You can access the *Vaccination* purgeable data type on the Purge Person Data and Create Purge Plan tasks to remove vaccination data you no longer need.

Related Information

Tasks

Steps: Configure Business Process Definitions

Reference

2021R2 What's New Post: Vaccination and Workplace Test Tracking

Steps: Configure the Add Workplace Test Business Process

Prerequisites

Security: The *Person Data: Workplace Testing* domain in the Workplace Test Tracking functional area.

These domains in the System functional area:

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

Context

You can configure the *Add Workplace Test* business process to complete the series of steps for workplace test tracking. This configuration provides you with the flexibility to react to health and safety concerns in the workplace. Example: Requiring employees to provide proof of a negative Covid-19 test.

Steps

1. Edit Business Process Security Policies.

   Select the *Workplace Test Tracking* functional area.
2. Edit Business Processes.

   Configure the *Add Workplace Test* business process as a subprocess of the *Onboarding* business process.
3. (Optional) Create Custom Labels.

   Select *HR Compliance* from the Term Context.

Result

Users can add workplace tests for themselves or for workers using the *Add Workplace Test* web service, and these tasks:

- Add My Workplace Test
- Add Workplace Test

Next Steps

- Add the Vaccinations report to the Personal for Worker Profile profile group. This profile report enables you to view all workplace tests for a worker.
- You can create custom reports for worker vaccine events using the indexed *Workplace Tests* report data source.
- You can use the *Get Workplace Tests* web service to retrieve vaccination data in bulk from Workday.
- You can access the *Workplace Test* purgeable data type on the Purge Person Data and Create Purge Plan tasks to remove workplace test data you no longer need.

Related Information

Tasks

Steps: Configure Business Process Definitions

Reference

2021R2 What's New Post: Vaccination and Workplace Test Tracking

Example: Create Alerts for Not Fully Vaccinated Workers

This example illustrates how to set up an alert based on the vaccination status of workers.

Context

You're managing the return to office for your workplace. You want to remind workers to complete their COVID-19 vaccination. You configure a monthly alert that routes to My Tasks of not fully vaccinated workers.

Prerequisites

Set up vaccination tracking. Create a *Vaccinated* status for COVID-19 vaccine types. Mark it as Fully Vaccinated.

Configure the *Add Vaccination* business process.

Security: These domains in the System functional area:

- *Custom Report Creation*
- *Manage: All Custom Reports*
- *Report Tag Management*
- *Notification Alerts*

Steps

1. Access the Create Custom Report task.
2. Enter these values:

Option	Description
Report Name	*Workers Not Fully Vaccinated*
Report Type	*Advanced*
Optimized for Performance	Clear the check box.

Option	Description
Data Source	*Workers for HCM Reporting*

3. Click OK.
4. Select *All Active Workers* for the Data Source Filter.
5. Select these values in the first grid on the Columns tab:

Business Object	Field	Options
Worker	*Worker*	*Worker Indicator*

6. Access the Filter tab.
7. Select these values in the Filter conditions for filtering on instances grid:

And/Or	Field	Operator
and	*Fully Vaccinated*	*is blank*

8. Access the Prompts tab.
9. Select these values in the Prompt Defaults grid:

Field	Default Type	Default Value	Do Not Prompt at Runtime
Vaccine Type Parameter	*Specify default value*	*COVID-19*	Select the check box.

10. Click OK.
11. Access the Configure Alert task.
12. Select *Workers Not Fully Vaccinated* for the Report Name.
13. Select *Monthly Recurrence* for the Run Frequency.
14. Click OK.
15. Enter *Alert for Not Fully Vaccinated Workers* for the Request Name.
16. Select *General Notifications* for the Notification Type.
17. Select these values in the Alert Configuration tab:

Section	Field	Description
Included Task	Task	*Add My Vaccination*
Recipients	Groups	• *Employee As Self* • *Contingent Worker As Self*
Subject	Notification Subject	*Update Your Vaccination Status*
Body	Introductory Comments	*We are reaching out to you regarding your vaccination status.*
Body	Details	In the Text field, enter *As we return to an in-person environment, we are asking all workers to be vaccinated. Please add your vaccination details.*
Body	Concluding Comments	*Thank you for doing your part to keep our workplace and our customers safe.*

18. Access the Schedule tab.
19. Select these values in the Monthly Recurrence Criteria section:

Option	Description
Every Month	Select the check box.
Day of the Week	*First Monday*
Start Time	*4:00 AM*
Time Zone	*GMT-08:00 Pacific Time (Los Angeles)*
Catch Up Behavior	*Run Once*

20. Select these values in the Range of Recurrence section:

Option	Description
Start Date	*03/01/2022*
End Date	*01/01/2023*

Result

Workday:

- Displays the alert in the Process Monitor report as an *Alert Job* process.
- Sends the alert to all workers who don't have the *Vaccinated* status.

Next Steps

Access the View Alerts report to view defined configurable alerts.

Related Information
Concepts
Concept: Alerts
Reference
2021R2 What's New Post: Vaccination and Workplace Test Tracking

FAQ: Contact and Personal Information

- What is the purpose of an alternate work location?
- How does Workday display primary and alternate work locations?
- Can I add a date when removing an alternate work address?
- Why can't I remove a worker's primary contact information?
- Does deleting emergency contact information for a worker impact dependent or beneficiary records? on page 102
- How can I prevent duplicate IDs when I hire an employee?
- Why are parts of an address missing on worker profiles?
- Is it possible to display some worker names in Western script only and others in both Western and a local script?
- How do I enter the date of death in Workday for a worker who dies?

What is the purpose of an alternate work location?	An alternate work location enables you to identify a work location address that is different than the business address. By default, the business location address is a worker's primary work location. When a worker defines a different address as their alternate work location, that address becomes their

	primary work location address. Example: a worker who always works from home selects their home address as an alternate work location; their home address becomes their primary work location.
How does Workday display primary and alternate work locations?	Worker profiles display the primary business location unless an employee has an alternate work location. The Change Contact Information task and the Change Work Contact Information task specifies: • *Current work location is business location* for workers who don't have an alternate work location. • *Current work location is home* for workers whose alternate work location is their primary home address. • *Current work location is alternate location* for workers who have an alternate work location with a different address.
Can I add a date when removing an alternate work address?	Yes. To include an effective date when you remove an alternate work address: 1. Access the Change Contact Information task. 2. Open the edit window and select the alternate work location. 3. Specify the Effective Date that the address is no longer valid. 4. Save the date by clicking away from the address field. 5. Remove the alternate work address and submit your changes. In the worker's history, the *Contact Change* event displays the specified date.
Why can't I remove a worker's primary contact information?	You can't remove primary contact information when the worker: • Has additional contact information. • Shares the contact information with others. First remove the worker's additional contact information or remove the shared information from the other person's record. Then remove the primary contact information.
Does deleting emergency contact information for a worker impact dependent or beneficiary records?	Deleting an emergency contact won't affect any entries that exist for the deleted individual. Example: A worker deletes an emergency contact listed as a dependent. Workday removes the dependent as an emergency contact, but continues to store the existing contact and personal information of the dependent.
How can I prevent duplicate national IDs when I hire an employee?	You can add a condition rule to the *Edit Government IDs* or the *Edit ID Information* business process.

The rule stops the business process when the employee's proposed ID duplicates an ID already in Workday.

1. Add a condition rule on the initiating step of the business process with these Rule Conditions:

Field	Value
Source External Field or Condition Rule	*National IDs - Proposed with Duplicates*
Relational Operator	*Is not empty*
Comparison Type	Leave blank

2. (Optional) Configure a custom validation message for the step.
3. Add the *Edit Government IDs* or *Edit IDs* step before the completion step of the *Hire* business process.

Why are parts of an address missing on worker profiles?

Workday displays addresses in a format typical of mailing addresses for a country. This format doesn't necessarily include all the fields you can enter. Example: In the U.S., you can enter a county, but it's not typically included in mailing addresses, so it doesn't display on worker profiles.

Is it possible to display some worker names in Western script only and others in both Western and a local script?

Workday displays names in the script that you enter for the worker.

How do I enter the date of death in Workday for a worker who dies?

Workday makes the Date of Death field available on the Edit Personal Information task after the *Termination* business process completes for the involuntary termination.

Related Information

Tasks

Create Business Process Condition Rules

Reference

Workday Community: Postal Code Validations

Worker Photos

Load Worker Photos Individually

Prerequisites

- Configure the *Photo Change* business process. Workday recommends that you add an *Approval* step to the business process.
- Configure security for each initiating action on the *Photo Change* business process.

- Security for the initiating actions:
    - *Self-Service: Personal Photo* domain in the Personal Data functional area.
    - *Person Data: Personal Photo* domain in the Personal Data functional area.

Context

Use the Edit Photo task to change worker photos, 1 photo at a time. To upload a batch of worker photos from an external server, see Steps: Set Up Integration to Load Worker Photos in Bulk on page 104.

Workers can change their own photos by selecting the related action from Personal Data > Change My Photo . Optionally, configure the Personal Information worklet on the Home landing page to include Photo as an action. You can also include the Change My Photo task as a step in the *Onboarding* business process to require the task in My Tasks.

Steps

1. Access the Edit Photo task to update the photograph associated with a particular employee.
2. In the Person field, enter the name of the employee (or select the name of the employee from the search results) and click OK.
3. Add the photo as an attachment.

Related Information

Concepts

Concept: Landing Pages

Concept: Worker Photo Recommendations on page 105

Concept: Security for Worker Photos on page 105

Tasks

Create Custom Business Processes

Steps: Set Up Integration to Load Worker Photos in Bulk

Context

You can create an integration to upload multiple worker photos from an external server.

Steps

1. Create Integration System.

   Enter the *Image Upload Template* on the New Using Template prompt.
2. Access the Create an Integration System User task.

   Security: *Integration Security* domain in the Integration functional area.
3. Grant the ISU *Put* access to these domains:

    - *Integration Event*
    - *Person Data: Personal Photo*

   See: Steps: Grant Integration or External Endpoint Access to Workday.
4. Select Integration System > Configure Integration Attributes as a related action on the integration system and enter integration service attributes.

   Security: *Integration Build* and *Integration Configure* domains in the Integration functional area.
5. Access the Configure Integration Services task.

   Enable the *Document Image Retrieval Service*, and don't enable the FTP client. You can't use both at the same time. We recommend using the *Document Image Retrieval Service* because it supports multiple protocols.

6. (Optional) Set Up Integration Retrieval.

   Complete this step if you enabled the *Document Image Retrieval Service*.
7. Launch an Integration .

Related Information

Tasks

Launch an Integration

Steps: Grant Integration or External Endpoint Access to Workday

Concept: Worker Photo Recommendations

Once you upload an image, it can display in many places throughout Workday. Therefore, images are dynamically scaled and cropped so that they display at an appropriate size. Although an image might be scaled and cropped at run time, the aspect ratio of the original image never changes.

For best results and performance, follow these guidelines:

Feature	Description
Size	The maximum image size (in terms of storage) is 10 MB.
Aspect Ratio	Use square images for best results. Because images typically display as circles within Workday, images in any other shape don't fit properly, resulting in white spaces in the circular area. An image about 200 x 200 pixels produces good results for most applications. Example: The worker profile image is 150 x 150 pixels. Elsewhere, the same images might display at 50 x 50 pixels. At run time, users can enlarge the image to its original size.
Background	A transparent background (available with PNG images, but not with the JPG format) is optimal. However, a solid white background also produces good results.
Color Space	Workday doesn't support images in the CMYK color space.
File Format	Workday supports JPG, PNG, and GIF formats for worker images. However, PNG and JPG images produce the best results in terms of size and quality. Worker images in GIF format might produce undesirable results when resized for different uses at run time.
Layout	Use a consistent photographic layout for all workers.

Related Information

Tasks

Load Worker Photos Individually on page 103

Steps: Set Up Integration to Load Worker Photos in Bulk on page 104

Concept: Security for Worker Photos

Access to worker photos is secured through a combination of:

- Domain security policies, which control who can view and modify worker photos.
- The business process security policy for the *Photo Change* business process, which controls who can perform actions on the *Photo Change* business process.

Viewing Worker Photos

To view and modify worker photos in Workday, set up the security on these domains:

- *Self-Service: Personal Photo*
- *Person Data: Personal Photo*

These domains control access to worker photos on profiles, preview cards, directory swirls, and elsewhere in Workday.

Note: On the *Person Data: Personal Photo* domain, users can see worker photos in directory swirls if they are granted access to either the Report/Task Permissions or the Integration Permissions. Visibility for all other worker photos is secured to Report/Task Permissions only.

Use the Domain Security Policies for Functional Area report to manage permissions. These domains are in the Personal Data functional area.

Changing and Editing Photos

The security policy for the *Photo Change* business process controls who can perform these initiating actions:

- Change My Photo
- Edit Photo
- Delete Photo
- Delete My Photo

You can also regulate who can perform actions on the business process such as approve, cancel, and rescind.

Use the Business Process Security Policies for Functional Area report to manage permissions. The *Photo Change* business process is secured to the Personal Data functional area.

Related Information
Tasks
Edit Domain Security Policies
Edit Business Process Security Policies

Worker Documents

Maintain Worker Documents

Prerequisites

- Create categories for worker documents with the Maintain Document Categories task.
- Secure document categories by segment and restrict access to certain types of documents with the Create Document Category Security Segment task.
- Security: These domains in the Personal Data functional area:
  - *Worker Data: Add Worker Documents*
  - *Worker Data: Edit and Delete Worker Documents*

Context

Government regulations and internal policies require that you maintain supporting documentation for many business processes. You can manage these documents with the Maintain Worker Documents report.

The Maintain My Worker Documents task is available for self-service employees to add, edit, and delete their worker documents. Employees who have permission on the *Self-Service: Add Worker Documents* domain can add worker documents. Employees who have permission on the *Self-Service: Edit and Delete Worker Documents* domain can edit and delete worker documents. You can also provide access to this task for pre-hires and terminated employees.

Note: Terminated employees can only view their worker documents. Terminated employees can't add, edit, or upload worker documents.

You can use these tenant setup tasks to configure attachments:

- The Edit Tenant Setup - System task specifies the allowed file types and size limits.
- The Edit Tenant Setup - Business Processes task enables business process attachments at the tenant level. Alternatively, you can enable attachments for a specific business process by configuring the business process security policy.

Steps

1. Access the Maintain Worker Documents report.
2. Add, edit, or delete documents in the Worker Documents section.

   You can view documents uploaded through various transactions in staffing, benefits, and compensation, but you can't edit or delete them. Instead, correct the related events.
3. When the worker has Reviewed Documents as part of a business process, you can:
   - View the effective date, signature type, and the signature date.
   - Access the document as an attachment or through a link.

Next Steps

You can also use the Business Process report field to report on business processes where a worker document was attached. For these business processes, Workday returns the latest created event:

- *Manage Certifications*.
- *Manage Education*.

Related Information

Tasks

Define Document Categories

Attach Documents to a Business Process Step

Steps: Maintain Access to Documents

Reference

Reference: File Size and Printing Limits

Personal Notes

Set Up Personal Notes

Prerequisites

Security: *Security Configuration* domain in System functional area.

Context

Personal notes to enable workers to capture notes about other workers directly on their worker profile. You can use personal notes to engage with other workers. Only you can view and edit your own notes. There are no web services for personal notes.

Steps

1. Set up security for the *Worker Data: Personal Notes* domain in the Worker Profile and Skills functional area.

   We recommend that you grant permission to all employees.
2. Add the Personal Notes report to the Overview or Personal profile group on the worker profile.

Next Steps

You can use the Personal Notes report field in a custom report to view your personal notes.

Reference Letters

Steps: Manage Reference Letters

Context

You can set up the *Request Reference Letter* business process to create, review, and generate dynamic documents for reference letter requests from your workers. Examples: Work reference, salary certificate.

Either you or your workers can initiate the *Request Reference Letter* business process, so you can create reference documents for your workers. These documents can provide your workers with information needed for local procedures such as:

- Applying for a visa.
- Renting a property.
- Requesting a mortgage.
- Setting up bank accounts.

You can complete reference letter requests for active, future, and terminated workers.

Steps

1. Edit Domain Security Policies.

   Set up these domains in the Staffing functional area:

   - *Set Up: Reference Letters*
   - *Worker Data: Reference Letters*
2. Access the Maintain Reference Letter Categories task.

   Create reference letter categories to organize reference letter templates.
3. Access the Maintain Reference Letter Templates task.

   Create reference letter templates for the Reference Letter Category and select whether you want to secure them to a country.

   The countries you select control access through the location of the worker's primary position when:

   - You create a reference letter for a worker.
   - A worker requests a reference letter.
4. Configure segment-based security groups to secure reference letter templates by security groups.

   See Steps: Set Up Segmented Security for Reference Letters on page 110.
5. Edit Business Process Security Policies.

   Set up security for the *Request Reference Letter* business process policy.

6. Create Custom Business Processes.

   Set up the *Request Reference Letter* business process.

   You can either configure:

   - A single business process definition with condition rules for the different reference letter categories and templates.
   - Multiple business process definitions with a separate definition for each reference letter category or template.

   See Configure Rule-Based Business Processes.
7. Set up the *Request Reference Letter* business process to generate dynamic documents using document templates associated with reference letter templates. See Steps: Generate Dynamic Documents.

   You can also create document templates for reference letters using Workday Docs. See Steps: Set Up Workday Docs.

   For information on how generated and uploaded reference letter documents display in the Worker Document File, see Concept: Review Documents Step.
8. Set up security segments for the *Reference Letter* document category.

   See Steps: Maintain Access to Documents.
9. Hide or Require Optional Fields.

   Workday recommends that you hide the *Document Language* field on the *Request Reference Letter* business process. The Generate Document step sets the document language based on the locale and language settings of the requester. Hiding the *Document Language* field simplifies the user experience.

   We recommend that you hide the *Document Language* field for all security groups to provide consistency between the Create Reference Letter for Worker task and Request Reference Letter tasks.
10. Activate Pending Security Policy Changes.

Result

You can now create a reference letter when:

- You select Worker Request > Create Reference Letter from a worker's related actions menu.
- A worker requests a reference letter by selecting Worker Request > Request Reference Letter from their related actions menu.

Next Steps

Configure the Create Reference Letter for Worker and Request Reference Letter tasks as:

- Bulletin worklets on the My Dashboard and Home dashboards.
- Announcements on the My Dashboard and Home dashboards.
- Actions on the Requests worklet.

Configure the Create Reference Letter for Worker as a bulletin worklet and announcement on the My Team Management dashboard.

Related Information

Concepts

Concept: Workday Docs

Tasks

Add Dashboard Menus

Set Up Worklets

Add Home and Dashboard Announcements

Reference

Reference: Edit Tenant Setup - Business Processes

Steps: Set Up Segmented Security for Reference Letters

Prerequisites

- Security: Configure these domains in the Staffing functional area:
  - *Set Up: Reference Letters*
  - *Set Up: Reference Letter Security Segments*
- Set up reference letter categories and reference letter templates.

Context

You can use segment-based security to restrict access to reference letter templates by security groups when:

- HR administrators create reference letters for workers.
- Workers request reference letters.

If you use segment-based security groups for reference letters, you must secure all reference letter templates to a segment-based security group.

When you restrict a reference letter template to a segment-based security group, the workers in this group can view the template in both of these tasks on the Reference Letter prompt:

- Create Reference Letter for Worker
- Request Reference Letter

Steps

1. Access the Create Reference Letter Security Segment task.

   Create security segments to restrict access to reference letter templates.
2. Create Segment-Based Security Groups.

   Select segments from the *Reference Letter Security Segment* category in the Access to Segments prompt and map these segments to security groups.

   Note: We recommend that you link each segment-based security group to its own segment. As a result, you can remove the segment-based security groups individually from reference letter templates.
3. Edit Domain Security Policies.

   Configure access for the segment-based security groups on the *Set Up: Reference Letter Security Segments* domain in the Staffing functional area.
4. Access the Maintain Reference Letter Templates task.

   Select the segment-based security groups for the reference letter templates.
5. Activate Pending Security Policy Changes.

Related Information

Concepts

Concept: Configurable Security

Concept: Security Groups

Find and Compare Workers

Compare Workers

Prerequisites

- Configure access to the domains that secure worker attributes. See Reference: Worker Attributes on page 115.
- Security: *Compare Workers* domain in Worker Profile and Skills functional area.

Context

You can compare worker information in a side-by-side layout from the Find Workers report. You can analyze key worker attributes related to compensation, skills and experience, talent, and work history.

You can also compare workers from a custom version of the Find Workers report by enabling the Compare mass action in the Mass Actions section on the Advanced tab of the report definition.

Steps

1. Access the Find Workers report.
2. Select up to 5 workers from the search results.
3. Click Compare.

   On the Compare Workers report:

   - Arrange the comparison to meet your needs by expanding or collapsing individual sections.
   - Click Table View to display the comparison in a grid.

Concept: Finding Workers

You can use the Find Workers report to search and filter your worker population. You can search by text and faceted options, such as location, job profile, and supervisory organization. When you select a value in the facets, Workday dynamically updates the list of workers and facet value counts in the Find Workers report. The facet value counts help you understand the worker population that satisfies the current filter criteria and guides your exploration.

Facets and Facet Values

Workday displays search facets on the Find Workers report.

- Facets correspond to generic categories, such as location and Job Profile.
- Each facet contains 1 or more facet values, which correspond to specific values in your tenant. Example: The location facet displays values for your specific locations.
- The number in parentheses indicates how many workers are associated with the facet value. Example: If you have a Chicago location with 8 workers, the location facet displays a value of *Chicago (8)*.
- If a facet has many possible values, a prompt enables you to select an additional facet value.
- The Skills facet displays recognized skills on the skills table, including both maintained skills and Skills Cloud skills.
- As you narrow your search, Workday updates the count numbers for other facet values. Workday hides the facet when:
  - A facet value count is zero.
  - All values for a facet are zero.

When workers have multiple jobs, Workday doesn't return data on the Find Workers report for these facets:

- Management Level
- Job Classification
- Employee Type
- Job Profile
- Base Pay Quartile

Keyword Search Options

You can use the keyword search field in combination with faceted search with these restrictions:

- Keyword search applies only to workers currently returned by the faceted search.
- Keyword search applies a hidden *worker:* prefix to the keyword that you enter.

Facet Search Index Updates

Workday updates the search index when any worker-related event is complete. Example: When an event such as hiring or terminating an employee completes, Workday updates the search index.

Search Security

The Find Workers report is secured to the *Search: Find Worker* domain. Individual facets are secured to the same domains as their underlying report fields. When you:

- Don't have view access to a facet domain, Workday doesn't display that facet on the Find Workers report.
- Do have access to the facet domain, Workday only includes those employees whose data you have permission to see. Example: You have permission to see the performance rating facet, but only for certain employees. The facet value counts for the ratings only includes the appropriate employees.

To identify the facet report fields, copy the Find Workers report and view the Facet Options on the Advanced tab.

To determine how a facet is secured in your tenant, search for the associated report field and select Security > View Security from its related actions menu. The View Report Field report also briefly describes the purpose of the report field and facet.

Saving Your Search

You can save Find Workers searches to use later or to determine membership in a dynamic talent pool. Saved searches are for your personal use and not available to others.

You can clear, open, or save a search. When you clickOpen, you can:

- Continue your last search, if there was a previous search during the same session.
- Select a search from a list of saved searches.
- Rename or delete any saved searches. You can't change the criteria of a saved search.

Custom Search Reports

You can create a custom version of the Find Workers report using the Workday Report Writer. A custom search report enables you to control the available search facets, the order, and the fields that display in the search results.

To simplify creation of a custom search report, you can access the delivered Find Workers report and select Standard Report > Copy from its related actions menu. You can then modify the report to meet your needs.

If you want to replace the standard version of Find Workers with the custom report, you can access the Hide Workday Delivered Report task. This task enables you to remove the standard report from menus and search results. Tasks and reports that you add to the Hide Workday Delivered Report are no longer visible in Workday.

Related Information

Concepts

Concept: Crowdsourced Skills and Experience Management on page 121

Tasks

Steps: Manage Talent Pools on page 1803

Configure Faceted Search Reports for Mobile

Reference

Reference: Search Workday

Concept: Worker Tags

Workday enables you to put workers into candidate, succession, or talent pools using tags. You can tag up to 500 workers at a time. Example: You can tag workers as outstanding contributors, potential directors, or ready for promotions.

You can tag workers by using the Tag icon at the top of reports. The icon is a solid right-facing arrow above a worker's name on their profile. You can tag workers when you include the Worker report field in your report definitions and the primary business object is either:

- Contingent Worker
- Employee
- Worker

You can also tag workers using:

- A report created on the Worker business object.
- The Find Workers report.

In addition to tagging workers manually, you can use the search results of a saved search from the Find Workers report to update talent pool membership automatically.

You can use search reports to tag workers. However, Workday recommends using another report type when you want to use a report to tag workers.

Related Information

Tasks

Add Members to Static Talent Pools on page 1806

Steps: Create Search Reports

Steps: Manage Talent Pools on page 1803

Concept: Employee Timeline

You can use the Employee Timeline report to compare the job, compensation, performance, and talent information for an employee on an annual basis. To access this report, you need access to either of these domains:

- *Self-Service: Historical Staffing Information*
- *Worker Data: Historical Staffing Information*

You can search for the report or add it to worker profiles. Using a side-by-side layout, it displays this information by year:

- Job: Job Profile, Manager, Location, Management Level.
- Compensation: Base Pay, Bonus, Pay Segment, and Compa-Ratio.
- Performance: Manager Rating, Manager Comment, Employee Rating, Employee Comment.
- Skills: Awards.

The report information is effective as of:

- The current date for the current year.
- December 31 for previous years.

You can also create a custom version of the Employee Timeline report with your own data points.

Concept: Previous System History

You can add a worker's job and compensation history from a previous system in 2 ways:

- Enter data manually for 1 worker at a time. From the related actions menu of the worker, select Worker History > Maintain Worker History from Previous System.

  Security: *Worker Data: Historical Staffing Information* domain in the Staffing functional area.

  Use the Maintain Custom Labels and Configure Optional Fields tasks to customize the data that you track in this grid. Workday doesn't enforce optional field configurations for previous system history in web service operations.
- Load data from a spreadsheet for 1 or more workers. Use the Create EIB task to set up an inbound integration and generate a spreadsheet template from a public Workday Web Service operation:
  - *Put Previous System Job History*
  - *Put Previous System Compensation History*

  Security: *Worker Data: Historical Staffing Information* domain in the Staffing functional area, and *Integration Build*, *Integration Event*, and *Integrations: EIBs* domains in the Integration functional area.

Reference IDs

Workday assigns a unique reference ID to each event from a previous system. When you enter events manually, Workday automatically generates the reference IDs. When you load history from a spreadsheet, you can either define your own reference ID values or have Workday create them during the upload.

Update or Delete History

You can also update or delete previous system history from a spreadsheet. Populate the spreadsheet ID column (*Previous_System_Job_History_ID* or *Previous_System_Compensation_History_ID*) with the reference IDs for the existing events. Follow these steps to find the existing reference IDs:

1. Access the worker profile.
2. In the Job profile group, click the Worker History tab.
3. In the Worker History from Previous System grid, select Integration IDs > View IDs from the related actions menu of the event.

View History

You can view the previous system job history of a worker by selecting Worker History > View Worker History by Category from a worker's related actions menu.

Report History

You can report on worker information from a previous system by creating custom reports using the My Direct Reports report data source. To report on:

- Compensation history, use the *Compensation History - Previous System* business object.
- Job history, use the *Job History from Previous System* business object.

Related Information
Concepts
Concept: EIB Template Models and Spreadsheet Templates

Tasks

Steps: Set Up EIBs Using Templates from Web Service Operations
Hide or Require Optional Fields
Create Custom Labels

Reference: Worker Attributes

Key worker attributes include:

Area	Attribute	Domain
Core Compensation	Base Pay	*Worker Data: Compensation by Organization*
	Compensation Basis	*Worker Data: Compensation by Organization*
	Quartile	*Worker Data: Compensation by Organization*
	Grade	*Worker Data: Compensation by Organization*
Qualifications	Competencies	*Person Data: Competencies* *Self-Service: Competencies*
	Certifications	*Person Data: Certifications* *Self-Service: Certifications*
	Education	*Person Data: Education* *Self-Service: Education*
Talent	Performance Over Time	*Self-Service: Performance Reviews* *Worker Data: Performance Reviews*
	Current Review Rating	*Self-Service: Performance Reviews* *Worker Data: Performance Reviews*
	Project Rating	*Worker Data: Project Performance*
	Potential	*Worker Data: Talent*
	Retention	*Worker Data: Talent*
	Loss Impact	*Worker Data: Talent*
	Relocation - Short Term	*Worker Data: Relocation Preferences*
	Relocation - Long Term	*Worker Data: Relocation Preferences*
	Willing to Travel	*Worker Data: Travel Preferences*
	Job Interests	*Worker Data: Job Interests*
	Career Preference	*Worker Data: Career Interests*
Tenure	Length of Service	*Worker Data: Current Staffing Information*
	Current Job History	*Self-Service: Historical Staffing Information* *Worker Data: Historical Staffing Information*
	Job History	*Person Data: Job History* *Self-Service: Job History*
	Time in Job	*Worker Data: Current Staffing Information*

Former Workers

Steps: Manage Former Worker Data

Prerequisites

Security: *Former Worker Storage* and *Former Worker Documents* domains in the Staffing functional area.

Context

Former workers are workers you terminate before your Workday implementation, but whom you still want to continue tracking. When storing data for former workers, you can identify rehires more quickly and access former worker data without impacting Workday performance. You can track these details for former workers:

- Names (legal, preferred).
- IDs (worker, national).
- Dates (hire, termination, service).
- Contact information (address, phone, country).
- Personal information (birthdate, ethnicity).
- Job details (title, manager, location, compensation).

You can't store previous Workday history or track events for former workers.

Steps

1. Use the Enterprise Interface Builder (EIB) to bulk load former worker data from a spreadsheet.

   The *Get Former Worker* and *Put Former Workers* web services have a 50,000 row limit for all transactions.

   Note: To enter or update former workers manually, access the Create Former Worker or Edit Former Worker task.

   See Steps: Set Up EIBs Using Templates from Web Service Operations.
2. (Optional) Access the Former Worker Documents report to add attachments for former workers.

   If you secure document categories by segment, you must have access to a category to view or update attachments in that category.
3. (Optional) Create and Edit Custom Object Definitions.

   Store additional data about former workers using custom fields.
4. (Optional) Access the Edit Tenant Setup - HCM task to manage data for rehired former workers.

Option	Description
Reuse Former Worker ID	Select this check box to reuse a former worker's ID as the employee ID or contingent worker ID when rehired.
Hide Former Worker Personal Data when Rehired	Select this check box to hide personal data in a former worker's record when rehired.

   See Reference: Edit Tenant Setup - HCM.

Result

You can use the View Former Worker report to search for and view former workers by their legal or preferred name, national ID, or worker ID.

Next Steps

Rehire a former worker with the Hire Employee or Contract Contingent Worker tasks.

Related Information

Tasks

Steps: Maintain Access to Documents

Concept: Rehire Former Workers

Former workers are workers you terminate before your Workday implementation, but you loaded them into storage. To access these workers, use the *Former Worker Storage* security domain. You can rehire a former worker using these tasks:

- Contract Contingent Worker
- Hire Employee

When you rehire former workers, Workday:

- Creates a pre-hire record.
- Populates the Original Hire Date field from the former worker's record.
- Prevents you from using the Edit Former Worker task to change the former worker's name, contact information, personal data, and national ID. However, you can update this information in the worker's profile.
- Adds a link to the former worker record on the worker's profile.

Related Information

Tasks

Steps: Manage Former Worker Data on page 115

Contract Contingent Workers on page 723

Hire Employees on page 690

Merge Duplicate Candidates on page 304

Reference

Reference: Edit Tenant Setup - HCM

Troubleshooting: Can't Reuse Employee ID for a Rehired Contingent Worker

The new hire event assigns a new employee ID to a rehired contingent worker even when you:

- Select the Reuse Worker ID and Reuse Former Worker ID check boxes on the Edit Tenant Setup - HCM task.
- Use the same pre-hire record to rehire a former worker.

Cause: The contingent worker has a rescinded hire event, and the worker profile associated with the rescinded hire event uses the contingent worker ID as the reference ID. The new hire event uses a unique employee ID for the rehired worker.

Solution:

Steps

1. From the related actions menu of the contingent worker and the new worker profiles, select Integration IDs > View IDs.

   Note the reference IDs for both former contingent worker and new worker.

   Security: *Integration Build* domain in the Integration functional area.

2. Access the Create Custom Report task.
    a) Clear the Optimized for Performance check box.
    b) Select *All Active* and *Terminated Workers* from the Data Source prompt.
    c) On the Columns tab, add rows with these values in the Field column:
        - *Reference ID*
        - Worker
    d) On the Filter tab, enter these values:

Option	Description
Field	*Reference ID*
Operator	*equal to*
Comparison Value	Enter the reference ID of the contingent worker.

    This report displays all active and terminated worker profiles that are linked to the reference ID of the contingent worker.

    Security: *Custom Report Creation* domain in the System functional area:
3. From the related actions menu of the worker profile with the same reference ID as the former contingent worker profile, select Worker History > View Worker History.

    Review all the events related to the worker profile for a rescinded hire event for this profile.
4. Access the Create Custom Report task.
    a) Clear the Optimized for Performance check box.
    b) Select *Workers with Rescinded Hire* from the Data Source prompt.
    c) On the Columns tab, add rows with these values in the Field column:
        - *Reference ID*
        - *Worker*
    d) On the Filter tab, enter these values:

Option	Description
Field	*Reference ID*
Operator	*equal to*
Comparison Value	Enter the reference ID of the contingent worker.

    This report displays the rescinded worker profile that uses the same reference ID as the contingent worker.

    Security: *Custom Report Creation* domain in the System functional area:
5. From the related actions menu of the rescinded worker profile with the same reference ID as the contingent worker, select Integration IDs > Edit Reference ID.

    Append *DNU* to the reference ID.

    Workday uses *do not use (DNU)* labels for objects that are planned for retirement.
6. From the related actions menu of the worker profile, select Worker History > View Worker History.

    Select Rescind as the related action on the *Hire* event.
7. Access the Hire Employee task.

    Hire the worker using the same pre-hire record.

Worker Experience

Steps: Set Up Skills and Experience

Prerequisites

Configure these business processes and security policies in the Worker Profile and Skills functional area:

- *Manage Awards and Activities*
- *Manage Certifications*
- *Manage Competencies*
- *Manage Education*
- *Manage Internal Projects*
- *Manage Job History*
- *Manage Languages*
- *Manage Professional Affiliations*
- *Manage Publications*
- *Manage Training*
- *Manage Work Experience*

Context

Skills and experience are components of worker profiles. Before you can assign a skill or experience to a worker, set up these components:

- Award and Activity Types.
- Competencies.
- Education.
- Certifications.
- Languages.
- Publication Types.
- Work Experiences.
- Training Types.
- Job History Companies.

Steps

1. Create a set of maintained skills that your organization wants to track.
   See Steps: Maintain Skills on page 1828.
2. Create a library of skill competencies to track.
   See Steps: Set Up Competencies on page 122.
3. Create schools, degrees, and fields of study to track.
   See Steps: Set Up Education on page 137.
4. Create certifications to track.
   See Steps: Set Up Certifications on page 131.
5. Create a library of languages, ability types, and proficiency levels to track.
   See Steps: Set Up Languages on page 139.
6. Define the different types of work experience and training types that you want to track.
   See Concept: Work Experience and Training Types on page 122.
7. Create a library of professional affiliations to track.
   See Steps: Set Up Professional Affiliations on page 139.

8. Create a list of companies to track.

   See Steps: Set Up Job History Companies on page 137.

Related Information

Concepts

Concept: Skills and Competencies Comparison on page 127

Manage Skills and Experience

Prerequisites

- Set up the individual skills and experiences that you want to track.
- Add skills and experience to worker profiles with the Configure Profile Group task.
- Security: *Set Up: System* domain in the System functional area.

Context

You can add, remove, and report on past and present skills and experience for workers.

Example: During talent reviews, managers and workers can have informed and specific discussions about how workers' skills and competencies have developed over time, and can discuss whether workers are ready for promotions by comparing their current skills and competencies to those required by higher job titles.

You can manage workers':

- Achievements
  - Awards
  - Activities
  - Publications
- Certifications
- Competencies
- Education
- Job History
- Internal Projects
- Languages
- Professional Affiliations
- Skills
- Training
- Work Experience
- Worker Projects

Steps

1. Add skills and experience for a worker:
   a) From the worker's related actions menu, select Talent > View Skills and Experience.
   b) Add each type of skill or experience on a separate tab.

   For certifications, competencies, professional affiliations, and schools, you can select values or create new ones if needed.

   You can also upload certification documents and view them in the Maintain Worker Document report.

2. Compare a worker's competencies to the competencies associated with their job:
    a) From the worker's skills and experience, select the Competencies tab.
    b) Click Compare to Job.

    This option is only available for workers assigned to jobs. 1 chart displays the competencies required for the job and the other chart displays additional competencies.
3. View the history of a worker's competencies:
    a) From the worker's Skills and Experience, click the Competencies tab.
    b) Click History.

Next Steps

- You can remove a worker's skills and experience unless they have pending actions.
- You can't remove competencies from a worker.
- Access the Business Process Security Policies for Functional Area report to give security groups permission to remove skills and experience.

Related Information
Concepts
The Next Level: Power of Skills
The Next Level: Establishing a Skills Blueprint
The Next Level: Skills versus Competencies
Tasks
The Next Level: Establishing a Skills Blueprint
Steps: Set Up Profiles and Profile Groups

Concept: Crowdsourced Skills and Experience Management

Administrators maintain libraries of recognized skills and experience that users can search for and add to their profiles. You can find recognized skills and experience on these reports:

- Maintain Certifications
- Maintain Job History Companies
- Maintain Schools
- Maintain Skills

If candidates and workers can't find certain skills and experience in your tenant, they can create crowdsourced versions to add on their profile. Crowdsourced skills and experience enable users to expand their profiles, but variations of the same crowdsourced skills and experience can create redundancies. Example: A worker creates Math as a crowdsourced skill, and a candidate creates Arithmetic.

Workday stores crowdsourced skills and experience on these reports:

- Find Certifications
- Find Job History Companies
- Find Schools
- Find Skill

To manage crowdsourced data, you can use these reports to merge crowdsourced skills and experience with recognized versions. Workday updates profiles to use the recognized versions.

You can prevent workers from creating crowdsourced skills by selecting the Disable Create New Skill for Edit Skills check box on the Maintain Skills and Experience Setup task.

If you enable this option, candidates can still create crowdsourced skills, but Workday won't migrate these crowdsourced skills to other person types. Example: When the candidate is hired, Workday won't copy crowdsourced skills from the candidate's skill profile to the worker's profile. The crowdsourced skills remain on the candidate's skill profile.

Concept: Work Experience and Training Types

Work Experience

You can add different types of work experiences and associate levels with the experiences in:

- Job profiles.
- Talent reviews.
- Worker profiles.

You can use the Maintain Work Experience task to create, edit, and delete work experiences. For each work experience, create different experience Levels. Levels can track years of experience, level of proficiency, or other tiered measurement you want to associate with the experience. You can optionally specify a Talent Card Sort Order to control the priority of the experience as it displays on the talent card.

Training Types

Training types are available to add to worker and job profiles. Examples:

- Classroom.
- Online.
- Textbook.
- On-the-job.

Add Training to worker or job profiles using the Configure Profile Group task. You can add this section to the:

- Overview, Career, or Performance profile group on worker profiles.
- Qualifications profile group on job profiles.

When you convert contingent workers to employees, or when you rehire former employees, Workday carries over their previous training to the new role.

Delete or Inactivate Work Experience or Training Types

- Select the Inactive check box to remove a work experience, experience level, or training type from selection lists. Though inactive, these items remain valid for employees who have already selected them.
- Delete a work experience, experience level, or training type by removing its row from the setup table. You can only delete items that aren't in use.

When you inactivate an experience level or training type, you may need to update job profiles or other objects to reflect a valid experience level or training type. When you submit changes to a job profile that includes an inactive work experience, you must remove the inactive entry.

Competencies

Steps: Set Up Competencies

Prerequisites

Security: *Set Up: Skills and Experience* domain in Worker Profile and Skills functional area.

Context

Create a library of skill competencies and associate them with a:

- Job family.
- Management level.
- Job profile.

- Position.

You can:

- Group related competencies into categories and related categories into classes.
- Set up multiple proficiency rating scales to measure competencies.
- Define behaviors associated with a competency by:
    - Management level.
    - Compensation grade.

Steps

1. Access the Maintain Skills and Experience Setup task.

   To associate competency behaviors to either management level or compensation grade, select *Compensation Grade* or *Management Level* from the Proficiency Rating prompt.
2. (Optional) Access the Maintain Competency Classes task.

   Create classes for grouping related competency categories.
3. (Optional) Access the Maintain Competency Categories task.

   Create categories for grouping related competencies.
4. (Optional) Access the Maintain Competency Precedence task.

   See Concept: Competency Precedence on page 130.
5. (Optional) Create Proficiency Rating Scales on page 123.

   Define the values that measure an employee's performance or proficiency rating in a specific competency.
6. Create or Edit Competencies on page 125.
7. Assign expected competencies and proficiency ratings to job families or management levels.

   See Concept: Job Family or Management Level Competencies on page 130.
8. (Optional) Edit Business Process Security Policies.

   Enable managers and workers to hide and restore competencies on worker profiles. Specify the security groups for the *Archive and Restore Competencies* initiating action on the *Manage Competencies* business process in the Performance Enablement functional area.
9. Configure the Competencies report on any of these profile groups:
    - Career for Worker Profile.
    - Overview for Worker Profile.
    - Performance for Worker Profile.

   See Steps: Set Up Profiles and Profile Groups.

Related Information

Tasks

Steps: Set Up Skills and Experience on page 119

Reference

The Next Level: Engaging Talent

The Next Level: Skills versus Competencies

Create Proficiency Rating Scales

Prerequisites

Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Context

Measure the proficiency of employees in specific competencies by creating rating scales with values and behaviors.

Steps

1. Access the Create Proficiency Rating Scale task.
2. For each proficiency rating scale, specify:

Option	Description
Rating	You can use alphabetic or numeric values.
Exclude From Calculations	To exclude items with this rating from calculations for section ratings or overall ratings, select this check box.
Rating Value	Enter a numeric value up to 2 decimal points. Workday uses this value to calculate employee performance rating.
Begin Range/End Range	Enter a numeric value up to 2 decimal points. Determines which rating value to use when calculating a section summary or overall rating. Example: If the rating is 3.25 and you don't have a 3.25 rating value, Workday finds the range for the value and converts it. Beginning and ending ranges can't overlap or have gaps.

Example

Rating	Rating Value	Begin Range	End Range	Behavior
Limited	1	0	1.49	Limited or no use of competency required for the job. Might have had limited opportunity to apply the competency.
Basic	2	1.5	2.49	Basic understanding and sufficient knowledge to do routine tasks. Understands and can discuss terminology and concepts related to the competency.
Proficient	3	2.5	3.49	Requires minimal guidance or supervision. Works

Rating	Rating Value	Begin Range	End Range	Behavior
				independently. Capable of assisting others in the application of the competency.
Advanced	4	3.5	4.49	Highly developed knowledge, understanding, and application of the competency. Has a long-term perspective.
Expert	5	4.5	5	Recognized by others as an expert in the competency. Has a strategic focus.

Next Steps

- To view details about the proficiency rating scale, access the View Proficiency Rating Scale report.
- To change or inactivate an existing proficiency rating scale, access the Edit Proficiency Rating Scale task.

  Note: You can't change a proficiency rating scale after associating it with a competency.
- To define competencies, access the Configure Competency task.

Related Information
Tasks
Steps: Set Up Skills and Experience on page 119
Create Rating Scales on page 1644

Create or Edit Competencies

Prerequisites

- Security: *Set Up: Skills and Experience* domain in Worker Profile and Skills functional area.
- Enable competency description and behaviors for either management level or compensation grade using the Maintain Skills and Experience Setup task.

Context

You can create a library of skill competencies to associate with a:

- Job family.
- Management level.
- Job profile.
- Worker.

You can change or inactivate existing competencies and assign a proficiency rating scale to measure each competency.

Steps

1. Access the Configure Competency task.

2. Select an Effective Date.

   For more information, see Concept: Competency Effective Date on page 131.
3. Click OK and Edit.
4. As you complete the task, consider:

Option	Description
Category	Workday displays the classes that the competency belongs to based on the categories you select.
Inactive	Select when the competency isn't ready for use or to discontinue use. Workday hides inactive competencies on worker profiles.
Description Applies to All Levels	Select to apply the description to all levels in your organization. Leave blank to define description by either the employee's: • Management level. • Compensation grade.
Proficiency Rating Scale	Select or create a proficiency rating scale to measure this competency. When you select an option, you can use the grid to enter behaviors that best reflect the ratings for this competency.
Behaviors Apply to All Levels	Select to apply behaviors to all levels in your organization. Leave blank to define behaviors by either the employee's: • Management level. • Compensation grade.

5. Click Save.
6. (Optional) Click the Configure for Management Level or Configure for Compensation Grade button to create different descriptions for the levels within the competency.

   Workday displays the applicable button from your setting on the Maintain Skills and Experience Setup task.

Next Steps

To use a competency in a talent matrix report, access the Set Up nBox Report task to map rating values to each box in the talent matrix grid.

You can't delete competencies, but you can rescind or correct employee competencies with the *Manage Competencies* business process.

Related Information

Concepts

Concept: Talent Matrix Reports on page 1801

Tasks

Steps: Set Up Skills and Experience on page 119

Steps: Set Up Development Plans on page 1692

Steps: Set Up Disciplinary Actions on page 1695

Steps: Set Up Performance Improvement Plans on page 1699
Steps: Set Up Performance Reviews on page 1679

Concept: Skills and Competencies Comparison

Comparing Skills with Competencies

Skills describe what tool sets workers need to perform the job, while competencies describe how well workers perform the job. Skills are specific learned abilities. Examples:

- Cloud Applications
- Cloud Security
- Python
- Software as a Service (SaaS)

Competencies are proficiencies workers use to achieve role objectives. Examples:

- Building Talent
- Championing Innovation
- Leadership
- Results Orientation

You can use skills and competencies to track the capabilities that users acquire from various sources. Examples include education, certifications, and languages. Knowledge of these capabilities can help you to make smart decisions in growing your organization. Skills and competencies provide different levels of configurability and insight. Familiarize yourself with both features to learn how each can support your organization.

You can use skills or competencies, or both, depending on your use cases and objectives.

Skills and competencies provide different approaches to administrative control and worker development.

Approach	Skills	Competencies
Administrative Control	Provide a user-driven approach to understanding the capabilities of your workforce. When you enable Skills Cloud, you can organize your skills catalog with less administrative maintenance. Skills Cloud also contributes to machine learning products and solutions.	Provide a high degree of control defined by the organization, and relies on administrative configuration to maintain the catalog. Competencies contribute to selected machine learning solutions for suggested learning, connections, and mentors.
Worker Development	Skills support discovery and growth for your workers. Examples: • How to bridge the skill gaps between an employee's current role and targeted future roles. • Determining what resources might support the employee in building more skills. • How to match the right people to the right job.	Competencies help improve evaluations, including reviews and retrospective conversations. Examples: • How did your competency rating compare to your target? • How do competency ratings impact overall performance ratings and compensation?

Use Cases and Maintenance

Skills and Competencies address different use cases and require different levels of maintenance.

	Skills	Competencies
Use Cases	• You need to optimize your talent (such as building, buying, or redeploying talent) based on a wide variety of technical skills, knowledge, and capabilities. • You need to build a broad and deep understanding of your workers' skill data, gaps, and trends. • You need to help your workforce understand their skill gaps to help them increase their skills. • You need to encourage a career development experience based on a wide variety of technical skills, knowledge, and capabilities.	• You need to rate all employees at specific, defined levels or compensation grades on 8 leadership competencies defined by your organization. • You need to rate targeted employees on 4 core values that you define for your organization. • You need detailed control over all definitions and descriptions, including proficiency rating scales, to evaluate employees by specific bands. • You need to conduct assessments of various worker populations to meet compliance requirements.
Maintenance	If you don't enable Skills Cloud, or if you have customer-specific skills (such as unique or proprietary skills), you must maintain the skills in your tenant. If you enable Skills Cloud, Workday continuously maintains and updates Skills Cloud skills.	You must maintain the competency catalog in your tenant. Workday supports Competencies business processes, so you can set effective dates for any changes.

Functionality

You can use Skills and Competencies to address different methods for evaluating workers.

Function	Skills	Competencies
Assign to employees	Mark skills as critical for employees based on supervisory organization, job family, and job profile. You can also assign skills as being critical to all employees.	Assign competencies based on worker's compensation grade and management level.
Ratings	You can set ratings using skill levels. Skills support peer-to-peer rating, manager-to-direct-report rating, and self-rating.	You can set targets by a worker's management level or compensation grade. Rating scales might vary by competency. Descriptions on ratings might vary based

Function	Skills	Competencies
	You can apply weights to different skill rating sources. You can add the *Get Feedback* step in employee review business processes to include skill ratings and surface ratings in employee reviews.	on compensation grade and management level. You can also change ratings over time and set effective dates for them.
Definitions	Skills don't support definitions. Skills Cloud skills are skills in Workday that are commonly understood in the market.	Competencies support definitions. You can change competency names and descriptions over time, and set effective dates for them.
Categorization and structure	You can set skill item categories and category groups to create an internal skills hierarchy. You can also mark skills as critical for a specific context. Examples: Job families, job profiles, or supervisory organizations.	You can set up competency classes and categories to organize a competency catalog.

Skills Cloud Features

You can use skills with or without enabling Skills Cloud. We recommend using Skills Cloud to take advantage of Workday's machine learning capabilities to:

- Collect the data to help you understand the skills of your workforce.
- Gain insight to plan for future organizational growth, including developing existing workers and hiring new ones.
- Optimize your programs for adding new skills and increasing expertise in existing skills of your workers.

Skills Cloud provides additional features when you enable it.

Features without Skills Cloud	Features with Skills Cloud
• Administrators maintain a list of skills that users can add to their profile. • Workers and candidates can create crowdsourced skills that they can't find, and add them to their profile.	• Increases the number of skills users can add to their profile. • Returns related skills based on a person's search. • Automatically performs regular background jobs that can reduce the number of skills to maintain. • Prepares your tenant for machine learning solutions from Workday.

Note: You can't disable Skills Cloud once you enable it.

For more information, see Setup Considerations: Skills Cloud on page 1844.

Related Information

Concepts

The Next Level: Power of Skills

The Next Level: Establishing a Skills Blueprint

The Next Level: Skills versus Competencies

Tasks

Steps: Set Up Competencies on page 122

Reference

The Next Level: Skills versus Competencies

Concept: Job Family or Management Level Competencies

You can set expected competencies and competency ratings for all employees in a job family or management level as a single action. Before you can work with Job Family or Management Level competencies:

- Create proficiency rating scales.
- Create competencies.
- Security: *Set Up: Skills and Experience* domain in Worker Profile and Skills functional area.

Use 1 of these tasks and select a Job Family or Management Level:

- Maintain Competencies for Job Family
- Maintain Competencies for Management Level

Select 1 or more competencies for this job family or management level. Managers and workers see these competencies in the Competencies from Other Sources section on the Competencies tab of their job profiles.

Each worker inherits specific competencies and competency ratings from all job levels. If the same competency is assigned to a worker at more than 1 job level, the competency rating set at the lower job level takes precedence:

- Job Family - Applies to any lower level unless overridden.
- Management Level - Overrides any competency rating for the same competency set at the job family level.
- Job Profile - Overrides any competency rating for the same competency set at the job family or management level.
- Position - Overrides any competency rating for the same competency set at the job family, management level, or job profile.

Specify that all employees with a management level of Director must have a rating of 3 (Proficient) on the Negotiating Skills competency. Then, edit the Director of Sales job profile to have a rating of 4 (Advanced) on the same competency. The job profile setting overrides the setting at the management level.

Related Information

Tasks

Steps: Set Up Development Plans on page 1692

Steps: Set Up Disciplinary Actions on page 1695

Steps: Set Up Performance Improvement Plans on page 1699

Steps: Set Up Performance Reviews on page 1679

Steps: Set Up Skills and Experience on page 119

Concept: Competency Precedence

You can add a single competency to a worker multiple times from different sources. Examples of sources include performance reviews, talent reviews, a talent administrator, and the worker. The Competencies tab on the Skills and Experience report displays a single instance of the worker's competency. The Compare to Job button compares a single instance of the worker's competency to the same competency associated with the job profile or position.

Competency precedences enable you to rank the priority of the sources so Workday can determine which instance of the competency to use. If you don't set up a precedence list, Workday uses the most recent update of a competency.

These precedences apply only to competency proficiency levels, not to competency ratings. On the worker profile, the assessed and target ratings for competencies reflect evaluations based on proficiency scales. If you use a rating scale to evaluate competencies in an employee review, access the history from the competency's related actions menu to view the ratings.

Concept: Competency Effective Date

When you create a competency, you set the date it becomes effective. The effective date applies to these attributes:

- Description.
- Proficiency scale.
- Proficiency ratings.
- Behaviors.

If you make multiple changes to these attributes and start an employee review with the changed competency, Workday applies only the first change. Changes you make to other attributes of a competency immediately impact the competency throughout Workday. If you change the proficiency rating scale on a competency, talent cards display competency ratings only after you evaluate the competency using the new scale.

When a competency is pulled into an employee review, the competency effective date might be different from the date the review was launched. In this situation, Workday pulls in the competency description of the compensation grade that's effective before or on the day the review was initiated.

Example: If you initiate the review on 3/14/22 with a competency effective date of 3/14/22, then Workday pulls the competency description into the employee review with the description as of 3/14/22. If you initiate the review on 3/14/22 and you change the competency grade with an effective date of 3/17/22, then Workday still pulls in the competency description with the description as of 3/14/22.

Certifications

Steps: Set Up Certifications

Context

You can create certifications that workers and academic affiliates can add on their worker or academic affiliate profiles. You can also access these certifications when you create or edit:

- Job profiles.
- Job requisitions.
- Positions.
- Position restrictions.

The combination of issuer name and certification must be unique.

Steps

1. Access the Maintain Certification Issuers task.

   Create a list of organizations that issue certifications.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
2. (Optional) Access the Maintain Skills and Experience Setup task.

   Select the Enable Specialties for Certifications check box.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
3. (Optional) Create or Edit Specialties and Subspecialties on page 132.
4. (Optional) Hide or Require Optional Fields.

   Configure specialty date fields on the *Manage Certifications* business process.

5. Access the Create Certification task.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
6. Set up security segments for the *Certification* document category and assign segment-based security groups to these domains:

   - *Worker Data: Add Worker Documents*
   - *Worker Data: Edit and Delete Worker Documents*

   See Steps: Maintain Access to Documents.
7. Steps: Set Up Profiles and Profile Groups.

   Configure the Certifications report on any of these profile groups:

   - Academic for Academic Affiliate Profile
   - Career for Worker Profile
   - Overview for Academic Affiliate Profile
   - Overview for Worker Profile

Result

Users with security permission on the *Manage Certifications* business process can view certification attachments.

Next Steps

- Access the Find Certifications report to merge crowdsourced certifications with recognized certifications.
- Access the Maintain Certifications report to:
  - Delete unused certifications.
  - View recognized certifications.
- To see worker certifications, access one of these reports:
  - Worker Certifications.
  - Worker Certifications with Specialties.

Related Information

Concepts

Setup Considerations: Delegation

Tasks

Steps: Set Up Skills and Experience on page 119

Create or Edit Specialties and Subspecialties

Prerequisites

Enable specialties for certifications on the Maintain Skills and Experience Setup task.

Security:

- *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
- *Set Up: Appointment Specialties* domain in the Academic Faculty functional area.

Context

Use specialties and subspecialties to give context to the certification achievements of workers and academic affiliates. You can:

- Track them on the worker or affiliate profile.
- Include them in job requisitions, position restrictions, and job profiles.

Steps

1. Access 1 of these tasks:
    - Create Specialty.
    - Edit Specialty.
    - Create Subspecialty.
    - Edit Subspecialty.
2. Enter a Name and a Code.

    The combination of name and code must be unique.
3. (Optional) To associate this specialty with only predefined certifications, select Restrict Specialty Usage.

    Use the Create Certification task to create predefined certifications.

Result

- Associate 1 or more specialties to a certification on the Create Certification or Edit Certification task.
- Workers and academic affiliates can select the associated specialties and subspecialties on the Add Certification task when they add a certification achievement to their profile.
- Search for workers with a specific specialty or subspecialty on the Find Workers report.

Next Steps

To see worker certifications with specialties and subspecialties, access the Worker Certifications with Specialties report.

Related Information
Tasks
Steps: Set Up Skills and Experience on page 119

Create Qualification Equivalence Rules

Prerequisites

Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Context

Create qualification equivalence rules to define complex certification requirements for job profiles that can be satisfied by multiple certifications. These rules help you track worker compliance with the certification requirements on their job profiles.

Steps

1. Access the Create Qualification Equivalence Rule task.

    As you complete this task, consider:

Option	Description
Description	This description will be the name of the rule.
Category	Select a category to make this rule easier to find. You can create *Qualification Equivalence Rule* categories using the Maintain Condition Rule Categories task.

Option	Description
Copy Condition from Rule	Select an existing rule to copy its existing condition.

2. In the Rule Conditions grid, build a qualification rule that identifies equivalent or additional certification requirements.

Example

You want to create a rule for an Imaging Technologist job profile that requires the ODHC - Ohio Department of Health Certification and any 1 of these certifications:

- ARRT(CI) - Cardiac Intervent Radio Certification
- ARRT(CT) - Computed Tomography Certification
- ARRT(MR) - Magnetic Resonance Imagery Certification
- ARRT(N) - Nuclear Medicine Technology Certification

1. In the Description field, enter a name such as *Imaging Technologist Certification Rule*.
2. In the Rule Conditions grid, enter these 2 rows:

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value	)
And		*Unexpired Certification Achievements*	*exact match with the selection list*	*Value specified in this filter*	*ODHC - Ohio Department of Health Certification*	
And		*Unexpired Certification Achievements*	*any in the selection list*	*Value specified in this filter*	*ARRT(CI) - Cardiac Intervent Radio Certification* *ARRT(CT) - Computed Tomography Certification* *ARRT(MR) - Magnetic Resonance Imagery Certification* *ARRT(N) - Nuclear Medicine Technology Certification*	

Next Steps

- Assign the qualification equivalence rule to an active job profile.

- Access the Maintain Qualification Equivalence Rules task to view or update your qualification equivalence rules.

Assign Qualification Equivalence Rules

Prerequisites

- Create a qualification equivalence rule.
- Security:
    - *Set Up: Job* in the Jobs & Positions functional area.
    - *Set Up: Skills and Experience* in the Worker Profile and Skills functional area.

Context

Assign qualification equivalence rules to job profiles so that HR administrators and managers can easily keep track of worker compliance with certification requirements.

You can assign a rule to multiple job profiles, but job profiles can only have 1 rule at a time.

Steps

Access the Assign Qualification Equivalence Rule task.

As you complete this task, consider:

Option	Description
Qualification Equivalence Rule	Select an active qualification equivalence rule to assign to a job profile.
Already Assigned to:	Workday displays this field if there are any job profiles associated with the rule you select.
Job Profile	Select 1 or more job profiles for the rule. You can't select job profiles with a future effective date.

Result

- Workday assigns the rule to the job profiles in addition to any previous job profiles.
- If a job profile that you select already has a rule, Workday replaces the existing rule with the new one.

Next Steps

- Use the Maintain Qualification Equivalence Rules to manage and view any rule assignments
- Use the Job Profile Qualification Equivalence Rule Compliance report to assess worker compliance with the rule on their job profile.

Job History

Steps: Set Up Job History

Context

Set up the *Manage Job History* business process so that workers, academic affiliates, and students can add their previous or current jobs on their talent profiles. If you want Workday to initiate job history changes during staffing events, you can configure the *Manage Job History (Sub Process)* action step on these staffing business processes:

- *Add Additional Job*
- *Change Job*
- *Hire*
- *Title Change*

Steps

1. Edit Business Process Security Policies.

   Set up security for the *Manage Job History* business process policy.

   (Optional) Assign security groups to the *Manage Job History (Sub Process)* action step.
2. Activate Pending Security Policy Changes.
3. Edit Business Processes.

   Set up the *Manage Job History* business process.

   (Optional) Add the *Manage Job History (Sub Process)* action step after the completion step of any of these business processes:

   - *Add Additional Job*
   - *Change Job*
   - *Hire*
   - *Title Change*
4. Create a library of companies for users to add on their job history.

   See Steps: Set Up Job History Companies on page 137.
5. (Optional) Access the Edit Tenant Setup - HCM task.

   On the Default Job History Company prompt in the Talent section, select a company that Workday populates during the *Manage Job History (Sub Process)* step.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.
6. Configure the Job History report on any of these profile groups:

   - Career for Worker Profile
   - Overview for Academic Affiliate Profile
   - Overview for Worker Profile
   - Performance for Worker Profile
   - Portfolio for Student

   See Steps: Set Up Profiles and Profile Groups.

Result

If you configure *Manage Job History (Sub Process)* as a step of a staffing business process, Workday updates a worker's job history to include the new job. During the subprocess, Workday populates these fields based on a worker's new job details and a default job history company if you selected one:

- Company
- Job Title
- Location
- Start Date

Related Information

Reference

Reference: Edit Tenant Setup - HCM

Steps: Set Up Job History Companies

Prerequisites

Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Context

Create a list of companies that workers can select from when they add their job history to their worker profile. You can associate a company with 1 or more industries to track job history industries for workers.

Workers can also add new companies when they add their job history on the worker profile. Workday automatically adds these companies and the companies imported from the Upload My Experience task to this list.

Steps

1. (Optional) Access the Maintain Job History Industries report.

   Create and maintain a list of job industries to associate with job companies.
2. Access the Maintain Job History Companies report.
3. Click Add.

   As you create companies, consider:

Option	Description
Industry	Select 1 or more industries to associate to this company.
Watching	Select to watch this company for recruiting or other purposes. You can then report on watched companies.
Duplicate of	Select to: • Merge company with a duplicate. • Link all usages to the existing company. • Inactivate a company.

Next Steps

To view the list of industries in your tenant, access the View Job History Industries report.

Related Information

Concepts

Concept: Crowdsourced Skills and Experience Management on page 121

Tasks

Steps: Set Up Skills and Experience on page 119

Steps: Set Up Education

Prerequisites

Configure the *Manage Education* business process and security policy in the Worker Profile and Skills functional area.

Context

You can create schools, degrees, and fields of study that workers or academic affiliates can use to complete or modify the education records on their profiles.

Steps

1. Access the Maintain School Types task.

   Define the types of educational institutions to group schools.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
2. Access the Create School task.

   Create recognized schools to add on the Maintain Schools table.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
3. Access the Maintain Degrees task.

   Define the degrees students can earn from educational institutions.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
4. Access the Maintain Fields of Study task.

   You can define the:

   - Classification of Instructional Programs (CIP) code.
   - Terminal degree by country.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
5. Set up security segments for the *Education* document category and assign segment-based security groups to these domains:

   - *Worker Data: Add Worker Documents*
   - *Worker Data: Edit and Delete Worker Documents*

   See Steps: Maintain Access to Documents.
6. Steps: Set Up Profiles and Profile Groups.

   Configure the Education report on any of these profile groups:

   - Academic for Academic Affiliate Profile
   - Career for Worker Profile
   - Overview for Worker Profile
   - Overview for Academic Affiliate Profile
   - Performance for Worker Profile
7. (Optional) Access the Edit Tenant Setup - Global task.

   In the Use Date with Day Precision for Education section, select the countries that track academic attendance by calendar date rather than by year. Workday doesn't convert yearly values to date values. When you select a country with existing worker and academic affiliate records, Workday leaves the date of attendance fields blank.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.

Result

A worker or academic affiliate can use the Add Education task to add the schools, degrees, and fields of study you created to their academic record.

Users with security permission on the *Manage Education* business process can view education attachments.

Next Steps

- Access the Find Schools report to merge unrecognized schools with recognized schools.
- Access the Maintain Schools report to:
  - Delete unused schools.
  - View recognized schools.

Steps: Set Up Languages

Prerequisites

Security: *Set Up: Skills and Experience* domain in the Worker Profile Skills functional area.

Context

You can add language abilities to:

- Job profiles.
- Worker profiles.
- Talent Reviews.

To measure the language abilities, create a library of:

- Languages.
- Ability types.
- Proficiency levels.

Steps

1. Access the Maintain Languages task.

   Define languages.
2. Access the Maintain Language Ability Types task.

   Define language ability types.

   If you include languages in talent reviews, select 1 language ability type for the talent review template. Employees specify their proficiency level for the selected ability type.
3. Access the Maintain Language Proficiency Levels task.

   Create language proficiency levels.

Next Steps

- To add language skills for workers:
  - From the worker's related actions menu, select Talent > View Skills and Experience > Languages.
  - From the worker's profile, select Languages in the Overview, Career, or Performance profile group.
  - From the worker's Talent Review, complete the Languages section if it is part of the review template.
- To delete a language, ability type, or proficiency level:
  - Select the Inactive check box. Inactive languages remain valid for employees who selected them.
  - Remove the row from the setup table. You can only delete language options if they aren't in use.

Steps: Set Up Professional Affiliations

Prerequisites

Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Context

With professional affiliations, you can track external work experience details, such as board membership, volunteer work, and visiting professorship, for workers, academic affiliates, and external committee members.

To track professional affiliations, create a library of:

- Professional affiliation types.
- Professional affiliation relationship types.
- Professional affiliations.

Steps

1. Access the Maintain Professional Affiliation Types task.
    a) Create a list of professional affiliation types, such as *Foundation* and *Military*.
    b) (Optional) Select the Enable Workday Delivered Professional Affiliation Types (School/ Company) check box to display Workday delivered professional affiliation types in your tenant.
2. Access the Maintain Professional Affiliation Relationship Types task.

    Create a list of professional affiliation relationship types, such as *Board Member* and *Volunteer*.
3. Access the Maintain Professional Affiliations task.

    Create a list of professional affiliations, such as *Salvation Army* and *YMCA*.
4. Configure the Professional Affiliations report on any of these profile groups:

    - Academic for Academic Affiliate Profile
    - Career for Worker Profile
    - Overview for Academic Affiliate Profile
    - Overview for External Committee Member Profile
    - Overview for Worker Profile
    - Performance for Worker Profile

    See Steps: Set Up Profiles and Profile Groups.

Result

You can select from predefined values when you add your professional affiliations on the worker, academic affiliate, or external committee member profile using the Add Professional Affiliation or Edit Professional Affiliation task.

Next Steps

- To view professional affiliation information, access these reports:

    - View Professional Affiliation Types.
    - View Professional Affiliation Relationship Types.
    - View Professional Affiliations.
    - Professional Affiliations for Organizations.
- To inactivate a professional affiliation, affiliation type, or relationship type, select the Inactive check box. The professional affiliation, affiliation type, or relationship type remains active for workers, academic affiliates, or external committee members who have already selected them.

Talent Statements

Steps: Set Up Talent Statements

Prerequisites

- Read Concept: Talent Statements on page 143.
- Security: *Security Configuration* domain in the System functional area.

Context

Set up talent statements so workers and academic affiliates can add personal, research, or talent-specific statements on their Workday profiles.

Steps

1. Edit Domain Security Policies.

   Configure the security policies for these domains:

   - *Person Data: Talent Statements* in the Worker Profile and Skills functional area.
   - *Self-Service: Talent Statements* in the Worker Profile and Skills functional area.
   - (Optional) *Talent Review: Talent Statements* domain in the Talent Pipeline functional area.
2. Access the Maintain Talent Statement Types task.

   - Define talent statement types for your tenant.
   - Select only the types that workers write about themselves to display on the card on the worker profile.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
3. Set Up Segmented Security by Talent Statement Type on page 142.
4. Edit Business Processes.

   Configure the *Manage Talent Statements* business process and security policy in the Worker Profile and Skills functional area.

   If you include an approval step, make sure that the approver has view-only access to the talent statement type on the *Access Talent Statement Type (Segmented)* security domain. Example: a manager or dean.
5. Configure the Talent Statements report on the applicable profile group:

   - Career for Worker Profile
   - Overview for Academic Affiliate Profile

   See Steps: Set Up Profiles and Profile Groups.
6. (Optional) Add the My Team's Talent Statements report to the:

   - Home landing page.
   - My Dashboard dashboard.

   See Steps: Set Up Dashboards and Landing Pages.
7. (Optional) Embed Related Worklets in Business Processes.

   Add the My Team's Talent Statements report as an embedded worklet on the *Assess Potential* business process.

Result

- The Statements card on the worker profile Summary enables workers to add, edit, or remove their personal talent statements.
- The Talent Statements section of the talent review enables workers to add their personal talent statements as part of their talent reviews.
- The Talent Statements report on the worker profile enables you to view talent statements others wrote about you.
- The Talent Statements report on the academic affiliate profile enables you to manage talent statements you write for yourself or view talent statements others wrote about you.
- Managers can use the My Team's Talent Statements report to view talent statements for their direct reports.

Set Up Segmented Security by Talent Statement Type

Prerequisites

- Define talent statement types with the Maintain Talent Statement Types task.
- Security: *Security Configuration* domain in the System functional area.

Context

You can secure potentially sensitive statement content with segmented security. Configure it to restrict access of certain talent statement types to members of designated security groups.

Example: You can configure security so only career coaches can see career coach statement types.

Note: Even if you don't secure talent statements by type, you must create a segment with all statement types.

Steps

1. Create a segment-based security group for a talent statement type.
    a) Access the Create Security Group task.
    b) For Type of Tenanted Security Group, select *Segment-Based Security Group*.
    c) Enter a Name that reflects the statement type you're segmenting.
    d) Select 1 or more groups from the Security Groups prompt.
    These groups will have access to the talent statement types you select in the next step.
    e) Select 1 or more talent statement types from the Access to Segments prompt.
2. Add the segmented security groups to the *Access Talent Statement Type (Segmented)* domain in the Worker Profile and Skills functional area.
    a) Access the *Access Talent Statement Type (Segmented)* domain.
    b) From the related actions menu of the domain, select Domain > View Security Policy.
    c) From the related actions menu, select Domain Security Policy > Enable.
    d) From the related actions menu, select Domain Security Policy > Edit Permissions.
    e) Add the segmented security groups in the Report/Task Permissions section.
    f) Select View or Modify.
3. Access the Activate Pending Security Policy Changes task to confirm changes.

Result
On the Add Talent Statement task, you can only see the talent statement types for which you have Modify permission.

Example

Statement Type	Description	Display on Worker Profile Card	Security Groups for Segment Security	
Personal (Talent Statement for Self)	Workers write statements about their career interests.	Yes	Employee as Self (View and Modify)	All Employees (View Only)
Professional Development (Talent Statement for Others)	Managers write statements for their direct reports about development areas.	No	Manager (View and Modify)	All Managers' Managers (View Only)

Related Information

Tasks

Create Segment-Based Security Groups

Concept: Talent Statements

Talent statements are brief professional descriptions about a person on their Workday profile. You can write talent statements about yourself or others. You can edit or remove the statements you write or statements that users in your security segment write if that is the group secured to the type of talent statement. Example: As an HR partner, you can edit or delete talent statements other HR partners write for any worker that you have security to view.

Workers and academic affiliates can use talent statements. You can use talent statements to support performance reviews, development discussions, and career planning.

Examples:

- Workers and academic affiliates can add statements about their career interests or research interests.
- Managers and deans can add statements about the performance or talent of their workers or affiliates.
- Career coaches can add statements about professional development areas of workers they coach.

Talent Statement Types

You can set up the types of talent statements for your tenant based on your business requirements. Create distinct types for statements about self and those statements written for others.

Examples:

- Personal (Self).
- Research (Self).
- Career Coaching (Others).
- Performance (Others).

Talent Statements for Workers

You can add, edit, and view talent statements written about a worker in the Statements card on the worker profile summary.

You can view talent statements others write about you on the Talent Statements report on the Career profile group of the worker profile.

Talent Statements for Academic Affiliates

You can add, edit, and view talent statements you write about yourself and others on the Talent Statements report on the Overview profile group of the affiliate profile.

Talent Statement Security

In addition to domain security policy, you must set up segmented security by talent statement type to control access to talent statements.

Related Information
Tasks
Set Up Segmented Security by Talent Statement Type on page 142

Country-Specific Information and Reporting

Locally Required Information

Maintain Localization Settings

Prerequisites
Security: *Set Up: Tenant Setup - Global* in the System functional area.

Context

Some types of information are only applicable to certain countries or regions. For other types of information, countries and regions have varying policies on tracking the information. You can enable, hide, or require information with localized fields according to country-specific settings for areas, such as:

- Contact Information
- Personal Information
- Staffing

Steps

1. Access the Maintain Localization Settings task.
2. As you complete the task, consider:

Option	Description
Applies to Person Type	Filter by person type to view applicable localized fields.
Allow for Countries or Regions	Select the countries or regions in which you want to enable the relevant localized field. If a country displays in the field, only workers in that country have the option to enter the localized field on the Edit Personal Information task. To hide the localized field, clear a country or region from this field. Workday hides this column if there are no countries or regions listed.

Option	Description
Require for Countries	This column only displays in areas that have localized fields you can require for specific countries. If the field is blank, all workers have the option to leave the localized field blank on the Edit Personal Information task. If a country displays in the field, only workers in that country are required to enter the localized field on the Edit Personal Information task.
Enforce Required in Web Services	If you required a localized field, you can select this check box to require the localized field in the relevant web services.
Active	To activate your settings, select the check box.

Note: The localized fields you hide or require in the Maintain Localization Settings task override any settings for the related optional fields in the Configure Optional Fields task. Example: If you hide the Reason optional field on the *Manage Probation Periods* business process, but you require the Probation Period: Reason localized field in the Maintain Localization Settings task for France, the field will be required for users managing probation periods in France.

3. Select the Active check box to activate the localized field settings.

Related Information
Reference
Workday 32 What's New Post: Recruiting National and Goverment IDs

Maintain Name Components by Country

Prerequisites

Security: *Set Up: Contact Info, IDs, and Personal Data* in the Contact Information functional area.

Context

You can enable, hide, or require name components by country on the Maintain Name Components by Country task for:

- Your tenant-wide settings.
- Workday Recruiting.
- All other functional areas in Workday.

Note: Workday uses the General Name Display Type field in the Name & Address Display section on the Edit Tenant Setup – System task for candidates and prospects.

Steps

1. Access the Maintain Name Components by Country task.
2. Click either the Name Components tab or the Recruiting Name Components tab.
3. As you complete the task, consider:

Option	Description
Allowed	Select the check box if you want to enable the relevant name component.
Required	Select the check box if you want the relevant name as a required component.

Option	Description
Enforce Required in Web Services	If you require a name component, you can select this check box to include this component as the relevant web services.
Label Override	If you provide a label override, Workday uses the label override as the description label instead.

Result

You configured name components for Workday Recruiting or other functional areas in Workday or both.

Next Steps

You can use the View Name Components by Country report to view your name component configurations.

Related Information

Tasks

Set Up Name Components on page 65

Reference

Workday 32 What's New Post: Recruiting Legal and Preferred Names

Workday 33 What's New Post: Configurable Name Components by Country

Concept: Custom Label for Country

If you want to use a different term for country throughout Workday, access the Maintain Custom Labels task to override this term. Workday displays the custom label instead of the default label in:

- Field labels.
- Help text.
- Prompts.
- Task names.
- Validations.
- Workday-delivered report fields and report names.

Custom labels don't replace country in these terms:

- Country ISO code.
- Country region.
- Country subregion.

Custom labels are available for all Workday supported languages.

Related Information

Tasks

Create Custom Labels

Reference

Workday 33 What's New Post: Custom Labels for Country

Concept: Locally Required Reporting

Workday helps you meet local reporting requirements by enabling you to track and report on job and worker information. You can also define the values of fields for jobs and employees for a country or country region, enabling you to comply with local requirements.

Example: If your enterprise operates within a single country or country region, you can define values that are specific to that location for fields such as:

- Citizenship statuses.
- Disabilities.
- Ethnicities.
- Job classifications.

If you operate in multiple locations and track different worker and job information, you can define values that are specific to each country or country region. The worker's primary business site location determines which country or country region data fields track personal information.

This level of flexibility is useful for countries that track or report data at the state or provincial level instead of, or in addition to, the country level.

Delivered Reports

Workday provides reports that enable you to view staffing information, headcount information, and worker details by organization.

Note: These reports only enable you to track or extract data. They don't output the data in a final, deliverable format. Workday doesn't assume responsibility for your compliance with regulatory reporting requirements.

You can use these reports for turnover analysis and measuring the effectiveness of staffing plans. They also assist you in meeting local reporting requirements, such as:

- Determining adverse impact to protected groups and minorities.
- Providing workers with personal details that your organization stores.

Key reports include:

- Employment Equity Report
- Gender Equality Report
- Headcount Report
- Labor Movement Report
- Retrenchment Report - Search
- Retrenchment Report with Known Termination Date
- Staffing Activity
- Staffing Activity Summary
- Termination Details
- Terminations
- Turnover Summary
- Worker Details

Workday also delivers country-specific reports to assist you in meeting local reporting requirements in France and the United States.

Workday recommends that you copy and customize these reports according to your organizational and local regulatory requirements.

Custom Reports

Using the Workday Report Writer, you can:

- Extract information from various data fields into custom reports.
- Export data into spreadsheets or web services.

As a best practice, verify that these reports conform to the reporting requirements in the given country or country region.

Related Information

Concepts

Concept: Custom Reports

Concept: United States Regulatory Reporting on page 161

Tasks

Steps: Set Up Personal Information Fields on page 36

Reference

Reference: Edit Tenant Setup - Global

Workday Community: Contributed Solutions

Reference: Locally Required Personal Information

You can create custom reports for locally required reports with these worker and job data fields. Workday doesn't make specific recommendations in this area because your requirements for tracking personal data depend on your organization's legal and local regulatory requirements.

Name and Address

Field	Report Category	Notes
Legal Name	Name	Includes all components of a worker's legal name. In Workday, name components are country-specific.
Addresses	Address & Phone	Returns all addresses that a worker has entered. If the work address doesn’t exist, returns the default location address.

Basic Bio and IDs

Field	Report Category	Notes
Age	Basic Bio	Useful for protected group and diversity reporting.
Citizenship Status	Basic Bio	Tracks a worker's citizenship in countries where the worker is employed or has citizenship. Use the Edit Tenant Setup - Global task to specify which countries track citizenship.
City of Birth	Basic Bio	Useful in countries where tracking city of birth is required for local reports.
Country of Birth	Basic Bio	Useful in countries where tracking country of birth is required for local reports.
Date of Birth	Basic Bio	Useful for protected group and diversity reporting.
Disability	Basic Bio	Useful for protected group and locally required reporting.
Ethnicity	Basic Bio	Useful for census, protected group, and diversity reporting. Values vary according to specific country requirements. If

Field	Report Category	Notes
		you’re required to track multiple ethnicity values for a given worker, access the Edit Tenant Setup - Global task.
Gender	Basic Bio	Useful for census, protected group, and diversity reporting.
Marital Status	Basic Bio	Useful for census reporting and other locally required reporting. Values vary by country, such as capturing *De Facto* in Australia and not capturing *Widowed* or *Divorced* in certain Asian countries.
Primary Nationality	Basic Bio	Tracks a worker's primary nationality if required in the worker's country of work. Use the Maintain Localization Settings task to specify which countries track primary nationality. Use the Maintain Non-Country Nationalities task to configure and edit non-country nationalities, as well as specify which countries track non-country nationalities.
Additional Nationalities	Basic Bio	Tracks a worker's additional nationalities if required in the worker's country of work. Use the Maintain Localization Settings task to specify which countries track additional nationalities. Use the Maintain Non-Country Nationalities task to configure and edit non-country nationalities, as well as specify which countries track non-country nationalities.
Religion	Basic Bio	Useful in countries where tracking religion is needed for locally required reporting or other purposes.
Employee ID	IDs	Returns the employee identification used at your enterprise.
Government Identifiers	IDs	Returns the government ID name and number. Government

Field	Report Category	Notes
		IDs include national IDs such as: • Social Security Number in the United States • Citizen ID Number in China Also includes any additional government IDs that you define, such as work permits or residence permits.
Licenses	IDs	Returns all licenses, including driver's license. You can use licenses to track qualification for a given position where such a license is required.
Passports	IDs	Returns passport information that you can use for identification and employment eligibility.
Visas	IDs	Returns visa information that you can use to verify ongoing employment eligibility.

Staffing

Field	Report Category	Notes
Employee Type	Employment	Indicates whether a person is an employee or contingent worker.
Hire Date	Employment	Use to track worker job changes for locally required reporting (such as adverse impact) and turnover analysis.
Termination Date	Employment	Useful to track worker job changes for locally required reporting (such as adverse impact) and turnover analysis.
Time Type	Employment	Indicates whether a worker is full-time or part time.
Company Insider Type	Job & Position	Use to track employees who are considered company insiders for reasons of stock purchasing.
Job Classification Groups	Job & Position	Returns categories typically established for compliance, such as EEO-1 in the United States; workers' compensation, or census reporting, such as

Field	Report Category	Notes
		Australian Classification of Occupations (ASCO).
Job Code	Job & Position	Returns new and old job codes based on the effective dates of the codes.
Job Title	Job & Position	Returns new and old job titles based on the effective dates of the titles.
Location	Organization	Use to determine the new and old locations for a worker after a reorganization with the effective dates of the organization changes or job transfers.
Supervisory Organization	Organization	Use to determine the new and old organizations for a worker after a reorganization with the effective dates of the organization changes or job transfers.
Termination Reason - Local	Staffing History	Use for locally required reporting (such as adverse impact) and turnover analysis.
Time of Hire	Staffing History	Use for countries where tracking time of hire for employees is required for local reports.

Talent

Field	Report Category	Notes
Education	Skills and Experience	Returns the names of the educational institutions that a worker attended.
Highest Degree	Skills and Experience	Returns the highest degree earned by a worker.
Military Statuses	Skills and Experience	Returns military status, such as whether an individual served in the military or has been waived from service. Also useful for assessing the impact of employment status if a worker is likely to be called to active military service due to active military or reserve status. This type of tracking is available for any country that requires you to track military status for these purposes.

Field	Report Category	Notes
Training	Skills and Experience	Returns training classes that a worker has completed.

Related Information

Concepts

Concept: Custom Reports

Reference

Reference: Edit Tenant Setup - Global

China Employment Requirements

Maintain China Subregions

Prerequisites

Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

Context

Set up and maintain subregions in China. Once you define China subregions, you can associate them with your office locations in order to provide different benefits or allowances to employees based on their hukou residence. When a subregion is no longer valid, you can inactivate it.

Steps

1. Access the Maintain China Subregions task.
2. Select the China Region for which you want to add subregions.
3. Add a row to the table.
4. Enter the Subregion Name and any other useful identifying text. You can't reuse a subregion name within the same region.

Result

For workers in China, Workday automatically determines whether a worker's hukou is local for social insurance purposes. A complete list of provinces and autonomous regions is available in Workday.

Example

Your location site is in Fuzhou in Fujian province and local authorities consider that a hukou issued outside the city of Fuzhou is nonlocal. In this case, you only need to define 2 subregions for Fujian province: Fuzhou City and Other Fujian.

Next Steps

- Access the Maintain Location Subregions task to link the China subregions with your location sites.
- Access the China Subregions report to view the subregions setup for particular regions in China.

Maintain Location Subregions

Prerequisites

- Define subregions for any region of China you need to differentiate. You might need to differentiate regions to offer different benefits or allowances, or to specify the portion of a region that's considered local to the worksite from the standpoint of statutory social benefits.
- Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

Context

Once you have defined subregions, link them to a business location in order to assign them to workers in that location. HR Partners can then use the hukou fields to update personal information for workers located in China who are Chinese citizens (as defined in the citizenship classifications). Only companies with locations in China currently use location subregions (also called hukou subregions).

Steps

1. Access the Maintain Location Subregions task.
2. Select the Location.
3. Add a row to the table.
4. Enter the Subregion name.

   You can set multiple subregions for a location.
5. If the subregion is considered local to the location (for social insurance), select the Local Hukou check box.

   When a subregion is no longer valid, you can inactivate it.

Example

Your company has 2 locations, Nanjing and Beijing. Employees in Nanjing receive special benefits if their hukou is for the city of Nanjing, but not if their hukou is for another place in Jiangsu Province.

To accommodate this situation, you must:

1. Define 2 subregions for Jiangsu: *Nanjing* and *Other Jiangsu*.
   a. Access the Maintain China Subregions task.
2. Associate both subregions with your Nanjing business location.
   a. Access the Maintain Location Subregions task.
   b. Select *Nanjing* as your Location.
   c. Add *Nanjing* and *Other Jiangsu* as subregions.
   d. Select the Local Hukou check box for *Nanjing*, if applicable.

Next Steps

Access the Location Subregions report to view the subregions defined for a specific location.

Concept: China Employment Requirements

Workday supports worker regulation in China.

Hukou Data - China

Workers in China are required to have an identifying document called a *hukou*. This document is a type of household registration that employers use to determine a worker's classification for social insurance rates in payroll. Example: A worker whose hukou was issued in Sichuan province might be taxed at a different rate when working in Guangzhou, compared to another worker whose hukou was issued in Guangzhou. In some cases, hukou classifications can also impact a worker's eligibility for leave, benefits, or compensation.

You can only collect hukou data for a worker who is both a Chinese citizen (as defined in the citizenship classifications) and located in China. Hong Kong and Macau don't use the hukou, though identification cards are mandatory for residents there.

The hukou enables an employer to know whether the worker:

- Is considered local to the work site.
- Belongs to an urban or rural locality.

When you enter hukou information for a worker, you can define places as local based on your work sites in China, by specifying the region and subregion where the hukou was issued. Workday then determines whether or not the hukou is local. This process is automatic whenever a worker transfers.

To determine which locations are local, you must define at least 1 subregion in the province or municipality where your work site is located. Use the Maintain China Subregions and Maintain Location Subregions tasks. You only need to set up subregions in provinces where you have locations.

Workday enables you to:

- Specify the subregions of China where you have operations.
- Enter, view, and update a worker’s hukou region, subregion, locality, type, and native region.
- See whether a worker’s hukou is local, based on the worker's location and the hukou subregion.
- Create reports containing China-specific data elements.
- Perform mass entries for new hires using one or more spreadsheets.

Personnel File - China

Workers in China have a Personnel File (人事档案), maintained by an authorized third party or a government agency. This file records their academic and employment history.

You can track the name and address of the agency that holds the worker's Personnel File in the Personnel File Agency field on these tasks:

- Edit Personal Information.
- Edit My Personal Information .

This field displays only when all of these requirements are true:

- The worker is an employee.
- The worker is a citizen of China, as defined in the citizenship classifications for China.
- The worker's location is in China.

Prior Work Experience - China

Chinese regulations require employers to grant employees a minimum amount of annual paid time off based on their total experience in the workforce, including experience with other employers. Use the Edit Service Dates task to enter the date when the worker first entered the workforce and the number of unemployed days since then. Workday then calculates the total work experience in months and displays it with the other service dates. You can also meet requirements for annual leave entitlement by specifying the number of continuous months of employment in the employee's most recent prior job.

France Reporting Requirements

Steps: Set Up for MMO Preparation (France)

Prerequisites
Create the PCS-ESE classifications using the Edit Job Classification Group task.

Context
You can configure Workday to run the MMO Preparation (France) report, enabling you to track all employee movements for a given month and help satisfy the data requirements for the *Déclaration mensuelle obligatoire des mouvements de main-d'œuvre* (DMMO) pertaining to employers operating in France. An employee movement can be a hire, termination, or transfer event.

Note: This report enables you to only extract data but not output the data in a final, deliverable format. You must transform the data to an appropriate form for submission and ensure that your reporting complies with application regulations. Workday enables you to track data for this report, but doesn't assume responsibility for your compliance with regulatory reporting requirements.

Steps

1. Access the Edit Company Tax Details task.

   Identify your company as a French establishment.

   Security:

   - *Set Up: Company General* domain in the Common Financial Management functional area.
   - *Set Up: Payroll - Company Specific (Accounting)* domain in the Core Payroll functional area.

   On the Tax IDs tab, add a row with these values:

Option	Description
Country for Tax ID Type	*France*
Tax ID Type	*SIRET*
Identification #	Enter the SIRET number.

   We recommend that you use the RUP for Workers (France) and RUP for Trainees (France) reports instead of RUP (France) (Do Not Use). You don't have to identify companies as French establishments when you use these reports.
2. Access 1 of these tasks:

   - Create Job Profile
   - Edit Job Profile

   Security: *Set Up: Job* domain in the Jobs & Positions functional area.

   Add *Professions et Catégories Socioprofessionnelles* (PCS-ESE) job classifications to all job profiles that contain a reportable employee.
3. Access the Maintain Employee Types task.

   Security: *Set Up: Position* domain in the Jobs & Positions functional area.

   Identify trainee and fixed-term employee types by selecting the Fixed Term Employee and Trainee check boxes.

   Note: To ensure proper accounting on the MMO Preparation (France) report for trainees converted to CDI or CDD, terminate the trainee and rehire as an employee rather than changing the employee type. report, terminate the trainee and rehire as an employee rather than changing the employee type.

4. Access the Maintain Local Termination Reasons task.

   Security: *Set Up: Staffing* domain in the Staffing functional area.

   Add codes to the local termination reasons.

   You can use the same code for multiple reasons.
5. (Optional) Access the Maintain Employee Contract Types task.

   Security: *Set Up: Employee Contracts* domain in the Staffing functional area.

   On the Code column, enter *OR* for the contract type you want to identify.

Related Information

Tasks

Create Job Profiles on page 573

Set Up Employee Types on page 530

Steps: Set Up for RUP Reporting

Prerequisites

Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

Context

You can configure Workday to help prepare your Registre Unique du Personnel (RUP) reporting obligations for employers operating in France.

You can use the RUP for Workers (France) report to view:

- Active workers.
- Information from staffing, person, and contract events.
- Terminated workers, or those who changed establishments, in the 5 years before the report run date.

The RUP for Workers (France) report doesn't contain information on workers for whom you require hiring or dismissal authorization.

You can use the RUP for Trainees (France) report to view:

- - All trainees in selected establishment(s), including terminated trainees or those who changed establishments in the 5 years before the report run date.
  - Entry and exit dates for trainees assigned to the selected establishment.

The RUP for Trainees (France) report doesn't contain information on:

- Multiple successive internships in the same establishment.
- Trainees with an international assignment or an additional job

Note: Workday enables you to track data for the Registre Unique du Personnel report, but doesn't assume responsibility for your compliance to regulatory reporting requirements.

Steps

1. Configure French establishments for your organization.

   See Steps: Set Up Establishments on page 172.
2. Access the Maintain Additional Government ID Types task.

   As you complete the Maps To column, consider:

Option	Description
Work Permit Type	Displays as work permits on RUP reports.
Authorization Type	Displays as authorizations on RUP reports.

Steps: Set Up for DPAE Preparation (France)

Context

Workday provides you with these reports to help you gather the data requirements for the Déclaration préalable à l'embauche (DPAE) reporting obligations:

- DPAE Preparation (France) identifies French establishments as companies with a SIRET tax ID. This report displays information regarding information from the Company organization structure in Workday, regardless of whether the worker is attached to an establishment.
- DPAE Preparation by Establishment identifies establishments based on entities configured in the Maintain Establishment task.

Both reports track all hires within a date range for a French establishment.

Note: These reports only extract data and don't output the data in a final, deliverable format. You can use the data as a support for creating the submission. You must ensure that your reporting complies with applicable regulations. Workday enables you to track data for these reports, but doesn't assume responsibility for your compliance to regulatory reporting requirements.

Steps

1. Configure your French organizations for DPAE reporting.

   See:

   - Steps: Set Up Companies for DPAE Reporting (France) on page 159.
   - Steps: Set Up Establishments for DPAE Reporting (France) on page 157.
2. Access the Maintain Localization Settings task.

   From the Area prompt, select the *Staffing* option.

   On the Time of Hire row, select *France* from the Allow for Countries or Regions prompt.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.
3. Access the Maintain Employee Types task.

   For employee types you want to report as a fixed-term contract, select Fixed Term Employee.

   Security: *Set Up: Position* domain in the Jobs & Positions functional area.
4. Verify personal and staffing information in Workday for French employees.

   See Reference: Worker Data Requirements for DPAE Preparation (France) on page 159.

Related Information
Tasks
Set Up Employee Types on page 530
Reference
Reference: Edit Tenant Setup - Global

Steps: Set Up Establishments for DPAE Reporting (France)

Prerequisites

- Set up establishments for French business sites.
- Define a primary business address for the location of your establishment.

Context

You can configure your establishments with the information required for Déclaration Préalable A l'Embauche (DPAE) reporting.

Note: When preparing a DPAE report based on establishments, use the DPAE Preparation by Establishment (France) report. The DPAE Preparation (France) report doesn't support establishments configured in Workday.

Steps

1. Access the Maintain Establishment task.

   Enter these establishment details:

   - Establishment Name
   - Industry Code
   - NIC
   - URSSAF Code

   Security: *Set Up: Establishment* domain in the Regulatory Reporting (HCM) functional area.
2. Access the Edit Establishment FRA Reporting task.

   On the DSN Header tab, add a row to the Declaration Contracts grid with these values:

Option	Description
Worker	Select a worker with a defined work phone number.
Type	*06 - Contact sur l'identification des salaries (NIR)*

   Security: *Set Up: Payroll (DSN) - FRA* domain in the FRA Payroll functional area.
3. Access the Edit Establishment FRA Tax Configuration task.

   On the URSSAF tab, add a row to the URSSAF grid with a start date and a deduction recipient.

   Security: *Set Up: Payroll - Company Specific (Taxes) - FRA* domain in the FRA Payroll functional area.
4. Access the Maintain Health Treatment Types report.

   Add a row with these values:

Option	Description
Treatment Type Name	Occupational health services
Code	CMT

   Security: *Set Up: Safety Incident Tracking* domain in the Safety Incident Tracking functional area.
5. Access the Maintain Health Facilities task.

   Add a row with these values:

Option	Description
Health Facility Name	Name of the health facility.
Health Facility Code	CMT
Health Treatment Type	Occupational health services

   Security: *Set Up: Safety Incident Tracking* domain in the Safety Incident Tracking functional area.

Related Information

Tasks

Steps: Set Up Establishments on page 172

Steps: Set Up Companies for DPAE Reporting (France)

Prerequisites

Set up companies.

Context

You can prepare data for a Déclaration préalable à l'embauche (DPAE) based on companies in Workday.

Note: When preparing a DPAE report based on establishments, use the DPAE Preparation by Establishment (France) report. The DPAE Preparation (France) report only reports information based on companies.

For regulatory reporting requirements, you can identify a company in Workday as a French establishment, as opposed to configuring establishments in Workday. When you configure a company as a French establishment, you can report on them in these reports:

- DPAE Preparation (France)
- MMO Preparation (France)
- RUP (France) (Do Not Use).

We recommend that you use the RUP for Workers (France) and RUP for Trainees (France) reports instead of RUP (France) (Do Not Use). You don't have to identify companies as French establishments when you use these reports.

Steps

1. Access the Edit Company Tax Details task.

   Identify your company as a French establishment.

   On the Tax IDs tab, add a row with these values:

Option	Description
Country for Tax ID Type	*France*
Tax ID Type	*SIRET*
Identification #	Enter the SIRET number.

   Security:

   - *Set Up: Company General* domain in the Common Financial Management functional area.
   - *Set Up: Payroll - Company Specific (Accounting)* domain in the Core Payroll functional area.
2. (Optional) Access the Edit Company Industry Codes task.

   Define the NAF/APE industry codes that apply to the establishment.

   Security: *Set Up: Company General* domain in the Common Financial Management functional area.

Reference: Worker Data Requirements for DPAE Preparation (France)

To ensure that you retrieve accurate data, Workday recommends that you verify worker staffing and personal data before running a DPAE preparation report.

Data	Options	Where to View It	How to Correct It
Hire Date	Hire Date. Workday doesn't report a worker when they change companies.	On the worker profile, access the Job Details report on the Job profile group.	Correct Staffing Events on page 939

Data	Options	Where to View It	How to Correct It
Job details	Employee Type. Workday reports employees with an employee type defined as a Fixed Term Employee on the Maintain Employee Types task as a fixed term contract. Workday reports other contracts as unlimited contracts.	On the worker profile, access the Job Details report on the Job profile group.	Correct Staffing Events on page 939 Set Up Employee Types on page 530
Personal Data	• Gender. • Date of Birth. • Country of Birth. • Region of Birth. • City of Birth.	On the worker profile, access the Personal Information report of the Personal group.	Steps: Set Up Personal Information Fields on page 36
Position	• End Employment Date. For fixed-term contracts only. • Time of Hire. For the DPAE Preparation by Establishment (France) report, Workday reports 9 am by default.	On the worker profile, access the Job Details report on the Job profile group. Click the Position.	Correct Staffing Events on page 939
Probation period	Probation Duration	Select Job Change > Manage Probation Periods from a worker's related actions menu.	Select Job Change > Manage Probation Periods from a worker's related actions menu.
Social Security Number	• Identification. • National ID Type: *Social Security ID (INSEE) Number*.	ID Information report.	Edit IDs task. Security: *Person Data: ID Information* domain in the Personal Data functional area.
URSSAF Code	URSSAF code	Add the URSSAF code report field to your custom reports.	• Configure Establishment By Country • Maintain Establishment • Assign Establishment
Worker name	• Legal name. • Preferred name (if available).	On the worker profile, access the Names report on the Personal profile group.	Steps: Set Up Worker Names on page 64

Related Information

Reference

2023R1 What's New Post: Establishment Enhancements for France and Germany

United States Reporting Requirements

Concept: United States Regulatory Reporting

Workday enables you to track data for United States reporting obligations.

Note: These reports only enable you to track or extract data. They don't output the data in a final, deliverable format. Workday doesn’t assume responsibility for your compliance with regulatory reporting requirements.

Benchmark Reporting

In accordance with the Office of Federal Contract Compliance Programs (OFCCP) regulation updates on August 27, 2013, Workday provides 2 benchmark reports you can use to track hiring goals for veterans and individuals with disabilities:

- Veteran Hire Benchmark
- Disability Placement Benchmark

You can use these reports to review your performance against the OFCCP benchmarks. The benchmark reports track data for the current calendar year as well as the 3 previous calendar years. The Veteran Hire Benchmark report measures your data against a benchmark of 8%. The Disability Placement Benchmark report uses 7%. To use a different benchmark percentage for either report, copy the report and change the percentage.

VETS-4212 Reporting

Workday provides 2 reports to help you meet your VETS-4212 reporting obligations:

- VETS-4212
- VETS-4212 Monthly Headcount for Minimum and Maximum

The VETS-4212 report displays the total number of employees in your organization as of the selected effective date and the number of employees who identify as protected veterans. The report doesn’t include terminated employees in these counts, but does include rehires.

It also displays the total number of newly hired employees in your organization as of an effective date, including employees who identify as protected veterans. The report includes terminated employees in these counts and possibly rehires, depending on their initial hire date. The VETS-4212 report defines new hires as employees initially hired in the 12-month period before the effective date you select.

If the effective date of the report is within 3 years of the discharge date of a recently separated, protected veteran, the report includes that veteran in the count.

On the VETS-4212 Monthly Headcount for Minimum and Maximum report, you can specify a reporting period.

Contingent workers aren't included in any of the counts on the VETS-4212 or VETS-4212 Monthly Headcount for Minimum and Maximum reports.

Diversity Data for U.S. Higher Education

For organizations in the U.S. higher education sector, Workday provides 4 reports to help satisfy requirements for the Integrated Postsecondary Education Data System (IPEDS) reporting requirements:

- Number of Non-Instructional Staff by Occupational Category

- Number of Instructional Staff With Faculty Status On Tenure Track
- Number of Instructional Staff With Faculty Status Not on Tenure Track
- Number of Instructional Staff With Faculty Status Tenured

Workday also provides a methodology and reporting tools to gather additional diversity data for compliance with IPEDS reporting requirements. You can search for IPEDS on Workday Community for step-by-step instructions. Organizations in other sectors can adapt this methodology to satisfy similar diversity reporting requirements.

Reporting for Affirmative Action Analysis

Workday provides 4 reports to help give you insight into the diversity and demographics of your workforce. These reports help you gather employment activity data that you can use to analyze Affirmative Action Programs in your organization:

- Hires by Race and Gender
- Promotions by Race and Gender
- Terminations by Race and Gender
- Transfers by Race and Gender

Related Information
Tasks
Steps: Set Up Reporting for IPEDS
Steps: Set Up Veteran Status Identification and Reporting on page 162

Veteran Status

Steps: Set Up Veteran Status Identification and Reporting

Context

Configure Workday to track veteran statuses for employees and extract data for compliance reports using the:

- *Veteran Status Identification* business process.
- VETS-4212 report.

Note: The VETS-4212 report in Workday helps you extract data you can use for VETS-4212 reporting for the U.S. Department of Labor. Workday doesn't assume responsibility for your compliance with regulatory reporting requirements.

Steps

1. Edit Business Process Security Policies.

   Configure the *Veteran Status Identification* business process security policy in the Personal Data functional area.
2. Edit Business Processes.

   Configure the *Veteran Status Identification* business process in the Personal Data functional area. You can configure the business process as a stand-alone business process or as a subprocess of the *Onboarding* business process.
3. Edit Domain Security Policies.

Report	Domain
VETS-4212	*Regulatory Reporting - USA* domain in the Regulatory Reporting (HCM) functional area.

Report	Domain
VETS-4212 Monthly Headcount for Minimum and Maximum	*Trended Worker Data* domain in the Staffing functional area.
View My Veteran Status Identification	*Self-Service: Veteran Status Identification* domain in the Personal Data functional area.
View Veteran Status Identification for Worker	*Worker Data: Veteran Status Identification* domain in the Personal Data functional area.

4. (Optional) If you want to report on veteran data for terminated workers, configure access to these domains and business process security policy in the Staffing functional area:
    - *Worker Data: Active and Terminated Workers* domain.
    - *Worker Data: Current Staffing Information* domain.
    - *Worker Data: Historical Staffing Information* domain.
    - *Termination* business process security policy.
5. Create Job Classification Groups on page 529.

    Create job categories matching the categories listed on the VETS-4212 form.
6. (Optional) Access the Maintain Veteran Status Identification Form task.
    a) Set the default description that displays for employees when they identify their veteran status. You can also configure your own descriptions for veteran status identification.

    Note: All configured responses that identify a protected veteran must map to the Workday delivered value *IDENTIFY AS ONE OR MORE OF THE CLASSIFICATIONS OF PROTECTED VETERANS*. The mapping ensures that the VETS-4212 report includes those responses as protected veterans.

    b) If you want employees to specify the type of protected veteran, select the Display Type of Protected Veteran Options check box.

    Security: *Set Up: Veteran Status Identification - USA* domain in the Regulatory Reporting (HCM) functional area.
7. Configure your tenant to use trended data that's required to run the VETS-4212 Monthly Headcount for Minimum and Maximum report.

    See Steps: Set Up Tenants for Trended Worker Reporting.

Result

You can extract data from the VETS-4212 report for compliance reporting.

Next Steps

You can use the View Veteran Status Identification for Worker report to view completed veteran status identification forms.

You can access the Change Veteran Status Identification for Worker task to change veteran status identification for employees.

Employees can access the Change My Veteran Status Identification task or the View My Veteran Status Identification report.

Related Information

Tasks

Steps: Set Up Personal Information Fields on page 36

EEO

Steps: Set Up EEO Reporting

Context

You can configure Workday so that these reports extract the data necessary for EEO reporting required by the Equal Employment Opportunity Commission (EEOC):

- EEO-1 Employment Data
- EEO-1 Employment Data – Performance Enhanced
- EEO-1 Employment Data by Establishment or Location
- EEO-1 Component 2 Employee Data
- EEO-1 Component 2 Employee Data by Establishment or Location
- EEO-3 Members
- EEO-4 Full-Time Employees
- EEO-4 Other Than Full-Time Employees
- EEO-4 New Hires
- EEO-5 Staff by Employee and Time Type
- EEO-5 New Hires Full-Time

Note: These reports only extract data. Output the data to an appropriate form for submission and ensure that your reporting complies with application regulations. Workday enables you to track data for these reports, but doesn't assume responsibility for your compliance.

Steps

1. Edit Domain Security Policies.

   Security:

   - *Person Data: Ethnicity Visual Survey* in the Personal Data functional area.
   - *Regulatory Reporting - USA* and *Reports: EEO Compliance* in the Regulatory Reporting (HCM) functional area.
2. Access the Edit Tenant Setup - Global task.

   Determine if you want to enable multiple races for the United States of America by selecting *United States of America* on the Allow in these Countries prompt in the Allow Multiple Ethnicities section.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.
3. Maintain Localization Settings on page 144.

   In the Area prompt, select *Personal Information*.

   Select *United States of America* for the Allow for Countries or Regions column, and select the Active check box for these localized fields:

   - Hispanic/Latino (Worker)
   - Race/Ethnicity (Worker)
4. Access the Maintain Ethnicities task.

   Select *United States of America* from the Country / Country Region prompt.

   Use the Maps to field to map your races to the Workday-delivered EEOC races required to run the reports. For visual survey, select the *Declined to Answer* option.

   Note: For EEO-1 purposes, don't create a *Hispanic or Latino* Race/Ethnicity on this task.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.

5. Access the Maintain Genders task.

   Ensure your gender codes map to the Is Male or Is Female check boxes.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
6. Create Job Classification Groups on page 529.
   a) Select *United States of America* as the Country/Country Region.
   b) In the Maps to field, map your job classifications to the *United States of America - EEO* job classifications.

Result

When you enable multiple race values and run EEO reports, the values map to the appropriate EEO categories.

Related Information
Concepts
Concept: Visual Survey for EEO Reporting on page 166
Reference
Reference: EEO Reports on page 166

Set Up EEO-1 Component 2 Employee Data Reports

Prerequisites

- Configure EEO reporting.
- Upload Hours Worked data through the *Put EEO Data Record* web service.
- If you subscribe to Workday Payroll, complete the Create W-2 Data task.
- If you don't subscribe to Workday Payroll, use the *Put EEO Data Record* web service to upload both Hours Worked and W-2 Box 1 data.

Security: *Reports: EEO Compliance* in the Regulatory Reporting (HCM) functional area.

Context

The EEO-1 Component 2 Employee Data and EEO-1 Component 2 Employee Data by Establishment or Location reports require employers to report wage information from W-2 Box 1 and total hours worked.

Steps

1. Access the EEO-1 Component 2 Employee Data report.

   Leave the EEO-1 Show Hours Worked check box clear to display the number of workers in the cells. Select the check box to replace these values with the hours worked for these workers. You can't display both views simultaneously.
2. (Optional) Access the EEO-1 Component 2 Employee Data by Establishment or Location report.
   a) From the Establishment or Location prompts, select the establishments or locations you want to aggregate results by.
   b) In the Report By section, you can select *Location* or *Establishment* to group results by establishment or location.

Related Information
Tasks
Steps: Set Up, Audit, and Print Year-End Tax Forms (USA)

Concept: Visual Survey for EEO Reporting

You can configure the visual survey functionality in your Workday tenant to record and report on the race and ethnicity of employees who don't self-identify. Workday secures visual survey race and ethnicity values separately from employee-entered race and ethnicity values. The Race/Ethnicity - Visual Survey section on the Edit Personal Information task and View Personal Information Details report is only visible when you're secured to the *Person Data: Ethnicity Visual Survey* domain in the Personal Data functional area.

Workday displays self-identified or visual survey race and ethnicity values on these reports:

- EEO-1 Component 2 Employee Data
- EEO-1 Component 2 Employee Data by Establishment or Location
- EEO-1 Employment Data
- EEO-1 Employment Data – Performance Enhanced
- EEO-1 Employment Data Audit
- EEO-1 Employment Data by Establishment or Location
- EEO-3 Members
- EEO-4 Full-Time Employees
- EEO-4 New Hires
- EEO-4 Other Than Full-Time Employees
- EEO-5 New Hires Full-Time
- EEO-5 Staff by Employee and Time Type

When you configure the Maintain Ethnicities task for *United States of America*, you can select the *Declined to Answer* option under the Maps to column. If available, Workday populates EEO reports with visual survey values when an employee doesn't self-identify their race or ethnicity.

Reference: EEO Reports

Workday provides 11 preparatory reports that you can use to help reach your Equal Employment Opportunity Commission (EEOC) goals. You only need to run the Workday reports that are specific to the reports you use. To collect all of the data you need for an EEO report, run the corresponding Workday reports.

Note: These reports only extract data. Output the data to an appropriate form for submission and ensure that your reporting complies with application regulations. Workday enables you to track data for these reports, but doesn't assume responsibility for your compliance.

EEO Report	Corresponding Workday Reports	Description of Workday Report	Security
EEO-1 Report Also known as the Employer Information Report.	EEO-1 Employment Data	Displays U.S. employees by job classification, race, ethnicity, and gender. The report uses the employee's primary job classification when an employee has additional jobs. Employees without EEO-1 job classifications display on the (Blank) row of the report.	*Regulatory Reporting - USA* in the Regulatory Reporting (HCM) functional area.

EEO Report	Corresponding Workday Reports	Description of Workday Report	Security
	EEO-1 Employment Data – Performance Enhanced	Generates EEO-1 data faster than the EEO-1 Employment Data report.	*Regulatory Reporting - USA* in the Regulatory Reporting (HCM) functional area.
	EEO-1 Employment Data by Establishment or Location	Displays U.S. employees of an organization by establishment or location in individual reports for each establishment or location.	*Regulatory Reporting - USA* in the Regulatory Reporting (HCM) functional area.
	EEO-1 Component 2 Employee Data	Displays employees by: • Job classification • Race or ethnicity • Gender • Pay band The report uses the employee's primary job classification when an employee has additional jobs. Displays U.S. employees by job category, hours worked, and pay band based on W-2 payroll data.	*Reports: EEO Compliance* in the Regulatory Reporting (HCM) functional area.
	EEO-1 Component 2 Employee Data by Establishment or Location	Displays wage information from W-2 Box 1 and total hours worked for all U.S. employees by: • Job classification • Race or ethnicity • Gender • Pay band The report uses the employee's primary job classification when an employee has additional jobs. You can filter the report by establishment or location.	*Reports: EEO Compliance* in the Regulatory Reporting (HCM) functional area.

EEO Report	Corresponding Workday Reports	Description of Workday Report	Security
EEO-3 Report Also known as the Local Union Report.	EEO-3 Members	Displays U.S. employees in unions by: • Job classification • Race or ethnicity • Gender	*Regulatory Reporting - USA* in the Regulatory Reporting (HCM) functional area.
EEO-4 Report Also known as the State and Local Government Report.	EEO-4 Full-Time Employees	Displays full-time U.S. state and local government employees by: • Job classification • Race or ethnicity • Gender	*Regulatory Reporting - USA* in the Regulatory Reporting (HCM) functional area.
	EEO-4 New Hires	Displays newly hired U.S. state and local government employees by: • Job classification • Race or ethnicity • Gender	*Regulatory Reporting - USA* in the Regulatory Reporting (HCM) functional area.
	EEO-4 Other Than Full-Time Employees	Displays U.S. state and local government employees that aren't full-time by: • Job classification • Race or ethnicity • Gender	*Regulatory Reporting - USA* in the Regulatory Reporting (HCM) functional area.
EEO-5 Report Also known as the Elementary-Secondary Staff Information Report.	EEO-5 Staff by Employee and Time Type	Displays newly hired public elementary and secondary district employees by: • Job classification • Race or ethnicity • Gender	*Regulatory Reporting - USA* in the Regulatory Reporting (HCM) functional area.
	EEO-5 New Hires Full-Time	Displays public elementary and secondary district employees by: • Job classification • Race or ethnicity • Gender	*Regulatory Reporting - USA* in the Regulatory Reporting (HCM) functional area.

Related Information

Tasks

Steps: Set Up EEO Reporting on page 164

Self-Identification of Disability

Steps: Set Up Self-Identification of Disability

Context

You can configure Workday so pre-hires and employees can complete the Voluntary Self-Identification of Disability (Form CC-305). You can track this data for the Office of Federal Contract Compliance Programs (OFCCP) compliance reporting in the United States. You can also upload externally collected self-identification of disability data from a spreadsheet using the Enterprise Interface Builder (EIB). Example: You can upload disability statuses, invitation dates, and response dates.

Note: Workday doesn’t assume responsibility for your compliance with regulatory reporting requirements.

Steps

1. Edit Business Process Security Policies.

   (Optional) Add security groups to the *Complete Employer Use Only Section* action step.

   This action step enables you to enter information in the For Employer Use Only section on the Change Self-Identification of Disability (For Employer Use Only) Inbox task. The information you enter is visible to pre-hires and employees.

   You can only correct data in the For Employer Use Only section. You can't correct previous versions of the form.

   Configure the *Disability Self-Identification* business process and security policy in the Personal Data functional area.
2. Edit Business Processes.
3. Edit Domain Security Policies.

   Security:

   - *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
   - *Self Service: Self-Identification of Disability - USA* and *Worker Data: Self-Identification of Disability - USA* domains in the Personal Data functional area.
4. Send Self-Identification of Disability Invitations on page 170.

Next Steps

You can use these reports to track invitation statuses and retrieve self-identification data:

Report	Description
Disability Placement Benchmark	Extract the data necessary for compliance reports related to the placement of individuals with disabilities in the United States.
Invitations to Disability Self-Identification Form Latest Disability Self-Identification Results for Active Employees Latest Disability Self-Identification Results for Terminated Employees	• Track the status of disability self-identification invitations that you've sent. • View the latest self-identification of disability results for 1 or more organizations, including results loaded externally.
View Disability Self-Identification Form for Worker	View a worker's most recent disability selection.

The View Disability Self-Identification Form for Worker and Disability Placement Benchmark reports only display data from the Edit Personal Information task. They don't display externally collected and uploaded data.

Send Self-Identification of Disability Invitations

Prerequisites

- Configure the *Disability Self-Identification* business process and security policy in the Personal Data functional area.
- Security:
    - *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
    - *Self Service: Self-Identification of Disability - USA* and *Worker Data: Self-Identification of Disability - USA* domains in the Personal Data functional area.

Context

Invite pre-hires and employees to self-identify their disability status. You can track this data for the Office of Federal Contract Compliance Programs (OFCCP) compliance reporting in the United States.

Steps

1. Access the Edit Tenant Setup - Notifications task.

   In the Notifications Delivery Settings section:

    a. On the HCM tab, access the Voluntary Self-Identification of Disability row and select the Override Parent Notification Type Settings check box.
    b. From the Rule prompt, select or create a routing rule that enables *Email* as the Channel and *Immediately* as the Default Frequency.
2. Access the Send Disability Self-Identification Invitations task.
3. Select 1 or more organizations or workers.

   When you select an organization, Workday sends the invitation only to active workers in the U.S. Workday doesn't send the invitation to:

    - Contingent workers.
    - Pre-hires.
    - Workers in other countries who don't have additional jobs or international assignments in the U.S.

   To send the invitation to pre-hires, you must select them on the Worker prompt.
4. (Optional) Select the Send Email Notification check box.

Result

Pre-hires and employees can update their disability status using the Change Self-Identification of Disability task.

Next Steps

You can print self-identification of disability forms with the Print Disability Self-Identification Form task. Workday prints the version of the Form CC-305 that was effective at the time of submission.

Related Information

Reference

Reference: Edit Tenant Setup - Notifications

Steps: Set Up Self-Identification of Disability (SF-256)

Context

Federal agencies must present the Self-Identification of Disabilities (SF-256) form to an employee during onboarding for voluntary self-identification of disabilities.

Note: Workday doesn’t assume responsibility for your compliance with regulatory reporting requirements.

Steps

1. Access the My Personal Data > Change Self-Identification of Disability (SF-256) task to voluntarily specify if you do or don’t have a disability, or you decline to answer.
2. Edit Domain Security Policies.

   Security:

   - *Self Service: Self-Identification of Disability - US Federal* domain in the Personal Data functional area.
   - *Worker Data: Self-Identification of Disability - US Federal* domains in the Personal Data functional area.
3. View your disability information in the View My Disability Self-Identification Form (SF-256) report.

   Employers can use the View Disability Self-Identification Form for Worker (SF-256) report to view disability information for workers in their organization.

Self-Identification of Ethnicity and Race (SF-181)

Steps: Set Up Self-Identification of Ethnicity and Race (SF-181)

Prerequisites

Configure the *Ethnicity and Race Self-Identification* business process and security policy in the Personal Data functional area.

Context

Federal agencies must present the Self-Identification of Ethnicity and Race (SF-181) form to an employee during onboarding for voluntary self-identification. Workday enables you to complete this form through employee self-service, manager self-service, and as a subprocess of the *Onboarding* business process. You can also upload externally collected self-identification of ethnicity and race information from a spreadsheet using Enterprise Interface Builder.

Note: Workday doesn't assume responsibility for your compliance with regulatory reporting requirements.

Steps

1. Edit Business Processes.

   Edit the *Onboarding* business process definition to add a *Change My Self-Identification of Ethnicity and Race* action.
2. Do 1 or both of:

   - As a worker, access the employee self-service Change My Self-Identification of Ethnicity and Race (SF-181) task from the Personal Data profile group on your profile.

     Security:*Self Service: Self-Identification of Ethnicity and Race - US Federal* in the Personal Data functional area.
   - On a worker's behalf, access the Change Self-Identification of Ethnicity and Race (SF-181) task from the Personal Data profile group on the worker's profile.

     Security: *Worker Data: Self-Identification of Ethnicity and Race - US Federal*

Result

You can generate a printable version of the form using the Print Ethnicity and Race Self-Identification Form (SF-181) task.

You can access the:

- View Ethnicity and Race Self-Identification Form for Worker (SF-181) report to retrieve the SF-181 forms for a worker.
- View My Ethnicity and Race Self-Identification Form (SF-181) report, which enables workers to view personal ethnicity and race information.

These reports only display data collected in Workday.

Steps: Set Up Establishments

Context

You can set up establishments for physical or service locations where your company conducts business. You can assign establishments to workers manually or automatically, making it easier to comply with global regulatory reporting standards, such as EEO reporting.

You can also propose establishments for candidates and assign establishments to workers.

Steps

1. Edit Domain Security Policies.

   Security: These domains in the in the Regulatory Reporting (HCM) functional area:

   - *Set Up: Establishment*
   - *Worker Data: Establishments*
2. Edit Business Process Security Policies.

   Configure the *Assign Establishment* business process security policy in the Jobs & Positions functional area.
3. Edit Business Processes.

   Configure the *Assign Establishment* business process to assign establishments to workers.

   You can either add *Complete Observer Assignment* as an action step to the *Assign Establishment* business process or add *Assign Establishment* as a substep to these business processes:

   - *Add Additional Job*
   - *Change Job*
   - *Contract Contingent Worker*
   - *Edit Position*
   - *Hire*

   If you configure *Assign Establishment* as a substep, you must have a completion step before the *Assign Establishment* step.

   If you add *Complete Observer Assignment* as an action step:

   - You must set it as the completion step.
   - Workday recommends you add a condition rule so the step initiates for locations that use EEO-1 reporting.
   - Workday secures the establishment to the security group you specify for this step.

   Note: If you add *Complete Observer Assignment* step to the *Assign Establishment* business process and then add *Assign Establishment* as a substep to an applicable staffing business process, Workday ignores the *Complete Observer Assignment* step even if there is a condition rule to skip the *Assign Establishment* substep.

4. Access the Configure Establishment by Country task.

   As you complete the task, consider:

Option	Considerations
Legal Entity Type	Select the organization level to associate with establishments.
Allow assignment of multiple jobs per worker	If you don't select this check box, automatic assignments are only based on a worker's primary position.
Inactivate auto reassignment of establishments	Select this check box to turn off assigning establishments automatically.
Allow Establishment on Employment Agreement/Offer	Select this check box to add the Establishment prompt to the *Employment Agreement* and *Offer* business processes.

   Select the organization level to associate with establishments in the Legal Entity Type field.

   Note: If you don't select the Allow assignment of multiple jobs per worker check box, automatic assignments are only based on a worker's primary position.

5. Access the Maintain Establishment task to create or update establishments.

   Select the business sites associated with the Country for Establishment in the Location field. Enter the code numbers for the reports specified in the Configure Establishment by Country task.

   TheLocation field only displays locations that have an address with:

   - The same Country as the Country for Establishment field.
   - An Effective Date that's on or before today's date.

6. (Optional) Access the Assign Establishment task to assign establishments to workers manually.

   You can also manually assign establishments to workers when you enable automatic assignments. However, Workday reassigns them based on your automatic establishment configuration the next time the business process runs. Workday recommends that you turn off automatic assignments to prevent automatic overrides before you manually assign establishments to workers.

7. (Optional) Enable autocomplete on the *Assign Establishment* business process definition.

   When you select the Enable Autocomplete check box and there is a default establishment, Workday automatically completes the add establishment step as a substep of applicable staffing events.

   See Set Up Security to Autocomplete Staffing Events.

Next Steps

- You can create a custom report using the Staff Movements (Reporting France) Events data source for French legal reporting requirements.
- You can view all establishments set up in your tenant for a particular country using the Establishment Set Up report.

Related Information

Tasks

Steps: Set Up EEO Reporting on page 164

Reference

Reference: Default Establishment Assignments on page 175

Workday 2023R2 What's New Post: Establishment on Employment Agreement, Offer, and Staffing

Reference: Global Library

When adding on another Workday product area or expanding into new countries or regions, use the Global Library report to view sample configurations and common compliance requirements.

The Global Library report is a preconfigured profile of 2 types of configurations:

- Workday delivered and maintained statutory guidance configurations. Example: State minimum wages, tax calculations, withholding and court order data, address and name formats.
- Sample configurations. On the sample configuration tabs, you'll see a description of how to implement them.

The Global Library report is also available as a menu item from these Workday-delivered dashboards:

- Pay Cycle Command Center
- Payroll Compliance Updates

When you click View Library for that country or country region, the Global Library reports display under these product areas:

Product Area	Reports	Security Domain
Contact Information	• Basic Address Format • Address Region • Address Subregions • Extended Address Format • Postal Code Validations • Name Components • International Phone Code	*Set Up: Contact Info, IDs, and Personal Data*
Personal Data	• Ethnicity • Marital Status • Religion • Military Status • Visa Types • Disabilities • National ID Types	*Set Up: Contact Info, IDs, and Personal Data*
Staffing	• Local Termination Reasons • Job Classifications	*Set Up: Staffing*
Time Off and Leave	Time off and Leave	One of these domains: • *Set Up: Time Off (General)* • *Set Up: Leave of Absence*
Time Off and Leave	Holiday Calendars	*Set Up: Calendar*
Time Tracking	Time Tracking Library	*Set Up: Time Tracking*
Payroll	Minimum Wages	*Set Up: Payroll (Minimum Wages View) - USA*
Payroll	• Multistate Withholding Rules • Tax/Allowance Data (Current)	*Set Up: Payroll (Taxes View)*

Product Area	Reports	Security Domain
	• Compliance Updates (Last 2 Years)	
Payroll	Withholding/Court Order Data (Current)	*Set Up: Payroll (Income Withholding Orders)*

You can use the Configure Profile Group task to configure which reports display in the product areas.

This information isn't a source of record for regulatory requirements. Verify requirements for the regions in which you operate.

Note: These reports only display if Workday has uploaded the relevant information for the country.

Your company is expanding and will have workers in Australia. You want to know what time off and leave sample configurations Workday offers for a starting point.

1. Select Australia for the Country.

   The Global Library report returns all configurations for Australia.
2. On the Australia row, click View Library.
3. On the Time Off and Leave tab, you'll see sample configurations and a description of how to implement them.

Related Information
Tasks
Steps: Set Up Profiles and Profile Groups

Reference: Default Establishment Assignments

Workday assigns default establishments to workers according to this logic:

- If there's no establishment in the employment agreement/offer, then Workday retains the existing establishment for a job or position if the location and legal entity remains the same.
- If there's no establishment in the employment agreement/offer and if the location or company changes for a job or position, then establishment populates from the legal entity/location.
- If there's no establishment in the employment agreement/offer and the legal entity/location has multiple establishment options, you'll have to select an establishment manually.
- If there's no establishment in the employment agreement/offer and legal entity/location, you'll have to select an establishment manually.

Recruiting

Recruiting Setup

Setup Considerations: Recruiting

You can use this topic to help make decisions when planning your configuration and use of Workday Recruiting. 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 Recruiting is a single platform that enables your organization to find, engage, and select the best candidates.

Business Benefits

- Increase efficiency by managing the entire recruiting process in Workday.
- Attract top candidates with a consistent and engaging candidate experience.
- Work flexibly by moving candidates through the recruiting process using the Workday mobile application.
- Manage your candidate pipeline more efficiently using candidate pools.
- Improve data accuracy by identifying and merging duplicate candidate records.
- Minimize biased candidate screening by masking identifiable candidate information.
- Increase recruiting efficiency with interview schedules for interviewers and locations.
- Improve productivity by automatically moving candidates forward in the recruiting process.
- Keep communication and collaboration in Workday by enabling recruiters and users involved in the recruiting process to add notes to job requisitions and candidate job applications.

Use Cases

- Track position requirements by creating job requisitions.
- Use custom branding on external career sites.
- Work with recruiting agencies to source external candidates using agency career sites.
- Create calendars to enable candidates to schedule their own times for high-volume recruiting events.
- Set up Candidate Engagement recruiting campaigns with message and notification templates that enable recruiters to target pools of prospects or candidates.
- Set up Candidate Engagement recruiting landing pages to enable recruitment marketers to design and publish external web pages that market your organization to specific populations.
- Use recruiting sources to track where your candidates come from. Example: LinkedIn.
- Set up referral payment plans to encourage workers to refer candidates to job openings.
- Collect candidate references and complete a reference check.
- Assess candidates using questionnaires.
- Send a request to external candidates at any stage in the recruiting process to ask them to provide personal information.
- Send or correct an offer of employment.
- Track background check information and automatically process candidates based on results.

Questions to Consider

Questions	Considerations
What kind of positions do you need to fill?	You can create: • Job requisitions to track requirements for unfilled positions. • Evergreen requisitions to continually source and track candidates for high-turnover or high-volume positions.

Questions	Considerations
	• Confidential job requisitions for classified positions. Example: Executive level positions.
How do you want to advertise jobs openings?	You can: • Create internal and external career sites to post job openings. • Use job posting templates to target specific audiences. Example: You can add a video to your job posting advertising your office space in Dublin to attract candidates. • Enable candidates to create alerts on career sites for relevant job postings.
How do you want to manage high-volume recruiting events?	You can: • Create calendars that enable candidates to reserve time slots. Example: Phone screenings. • Enable recruiters to schedule and manage event time slots on behalf of candidates.
How do you want to manage referrals and endorsements?	You can enable: • Workers to submit candidates to open job requisitions. • Candidates to identify a referring worker when applying to a job posting. • Workers to endorse a candidate's job application. Configure referral payment plans to reward workers who refer successful candidates.
How do you want to work with recruiting agencies?	You can create: • Agencies and establish hierarchies between them. • Agency career sites for job postings. • Agency types for different types of vacancies. You can also track agency payments for successful candidates.
How do you want to collect candidate information?	Gather and manage information from candidates using: • Applications. • Questionnaires. • Assessments. • Background check results.
How do you want to organize your candidates?	Create candidate pools to manage your candidate pipeline and group internal and external candidates based on set criteria. Example: Recruiting sources. Create a:

Questions	Considerations
	• Dynamic pool to automatically and continuously add candidates who match your search criteria. • Static pool to add candidates manually.
How do you want to manage duplicate candidate records?	Workday enables you to manage duplicate records using 1 of these functionalities: • Recruiting match and merge, which enables you to merge candidates to different person types. • Duplicate Management Framework, which provides flexibility when configuring merge rules and supports a variety of merge types. When you opt in to the Duplicate Management Framework, you can't opt out or access Recruiting match and merge functionality again.
How do you want to manage interviews?	Manage your interviews entirely in Workday or use 1 of these calendar integrations for scheduling: • Google Calendar • Microsoft™ Outlook 365 You can configure Workday to: • Recommend interview schedules based on interviewer and location availability. • Enable interviewers to provide feedback in Workday. Example: Competency ratings.
How do you want to manage offers or employment agreements?	You can: • Manage and submit multiple offer or employment agreement tasks at once. • Set up offers and employment agreements to automatically initiate in the *Job Application* dynamic business process. Note: Auto-initiate offer only works when salary or hourly are the only forms of compensation in the offer. • Negotiate and regenerate offers through Candidate Home accounts. Example: The candidate requests a later start date and you need to update and regenerate the offer letter.
How do you want to manage compliance obligations?	Workday enables you to: • Track diversity goals by delivering metrics and reports that analyze candidate gender and ethnicity information. • Identify and purge candidate and job application data when you no longer need it.

Questions	Considerations
How do you want to manage access to your recruiting processes?	To control access to recruiting processes: • Use segmented security to restrict access to recruiting processes. Example: Configure access to questionnaire responses. • Hide certain information on the candidate profile to help prevent biased candidate screening. Example: You can mask education details during the candidate screening process.

Recommendations

To increase efficiency, configure business process steps to:

- Post or unpost jobs when you create, edit, or freeze job requisitions.
- Automatically unpost jobs when you close or fill a job requisition.

Requirements

Configure job requisitions to track requirements for unfilled positions and move candidates through the recruiting process.

Limitations

You can't use Outlook for Microsoft Office 365 with Workday Recruiting when you have:

- More than 1 instance of Outlook for Microsoft Office 365.
- Any combination of hybrid, on-premise, or cloud data storage.

When you opt in to the Duplicate Management Framework, you can't use Recruiting match and merge functionality.

The Recruiting business processes don't support the Hide Details from Person check box. We recommend that you don't select the check box when you edit your business process policies.

Tenant Setup

Access the Edit Tenant Setup - Recruiting task to configure:

- Referral ownership levels.
- A duplicate referrals policy.
- Automatic candidate merging for the Recruiting Match and Merge functionality.
- Integrations for interview scheduling calendars.
- The ability for candidates to reapply to job requisitions.
- Settings for populating and copying personal information on job applications.
- Preferred name settings.
- A link to your privacy policy on external career sites.
- Calculations for the Time to Fill report.
- Required Candidate Home accounts.
- Verification emails for candidates creating Candidate Home accounts.

You can also configure the Edit Tenant Setup - HCM task to:

- Create ID definitions. Example: Job requisition IDs.
- Enable Workday to populate organizations on job requisitions.
- Enable users to remove or replace a questionnaire on a job requisition.

Security

Use segment-based security groups to grant specific users access to job application data during the recruiting process.

To view the different security domains for Recruiting, access the Domain Security Policies for Functional Area report and select the Recruiting functional area.

Security domains in the Recruiting functional area enable users to configure, manage, and use Recruiting features, such as:

- Candidates
- Evergreen Requisitions
- External Career Sites
- Interviews
- Job Applications
- Job Postings
- Job Requisitions
- Offers
- Prospects
- Questionnaires
- Recruiting Agencies
- Recruiting Notes
- Referrals and Endorsements

Business Processes

Business Processes	Considerations
Assess Candidate	Configure to send assessment tasks to candidates.
Background Check	Configure to manage background check information for candidates.
Interview	Configure to: • Schedule interviews. • Collect candidate feedback. • Forward candidate feedback to a decision-maker.
Job Application	Configure to create a flexible or linear workflow for candidate management.
Job Requisition	Configure to create job requisitions for new or existing positions.
Offer	Configure to: • Set a compensation basis. • Request and get approval for stock grants or one-time payment plans. • Generate, send, and receive electronically signed documents. • Renegotiate offers.
Refer a Candidate	Configure to manage candidate referrals.
Reference Check	Configure to manage candidate reference checks.

Business Processes	Considerations
Ready for Hire	Configure to initiate staffing transactions automatically. Example: Hire, Change Job.
Screen	Configure the workflow for candidate screening.
Submit Recruiting Agency Candidate	Configure to enable agency users to submit candidates to open job requisitions.

Reporting

To view the available reports for Workday Recruiting, access the Workday Standard Reports report and select one of these categories:

Report Categories	Considerations
Recruiting	Use reports in this category to report on: • Assessments • Candidates • Diversity metrics • Interviews • Job applications • Job postings • Job requisitions • Recruiting agencies • Recruiting self-schedule calendars • Referrals
Set Up Recruiting	Use reports in this category to verify and view a summary of your recruiting configuration.

Integrations

Consider these web services and integrations when configuring Workday Recruiting:

Web Services	Considerations
Assess Candidate	Use to request and manage assessment tests for candidates.
Candidate Attachments	Use to load documents for prospects and candidates.
Create Job Requisition	Use to create job requisitions for positions in position management supervisory organizations.
Offer	Use to initiate offers for job applications.
Post Job	Use to post jobs to third-party websites.
Put Background Check	Use to mass upload background information for multiple records.
Put Candidate	Use to load prospects and candidates.
Submit Recruiting Agency Candidate	Use to submit recruiting agency candidates.

Integrations	Considerations
Adobe Sign *DocuSign*	Use to obtain digital signatures from candidates.
LinkedIn Recruiter System Connect	Enables users on LinkedIn Recruiter to view relevant candidate data from Workday.
Report-as-a-Service (RaaS)	Use to post job openings to third-party websites.

Connections and Touchpoints

Touchpoints	Considerations
Compensation	Workday derives compensation values for offers or employment agreements from job requisitions.
Duplicate Management Framework	Use to manage duplicate records in your tenant. Opting in to the Duplicate Management Framework is a tenant-wide change that you can't repeat or undo.
Extended Enterprise Learning	You can enable extended enterprise learners to view and apply for jobs for nonworkers within your organization. When you hire an extended enterprise learner, their learning transcripts and talent certifications transition with them to their new role.
Skills Cloud	Configure Skills Cloud to build qualification requirements and enable suggested skills on job requisitions and job applications. 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.
Staffing	Job requisitions support the position and job management staffing models.
Talent	You can enable the Opportunity Marketplace to include internal job postings. Employees can browse jobs and access job postings from the Opportunity Marketplace.

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: Job Requisitions for Recruiting on page 214
Setup Considerations: Skills in Recruiting on page 183
Setup Considerations: Evergreen Requisitions on page 232
Setup Considerations: Duplicate Candidate Merging on page 299
Setup Considerations: Candidate Self-Scheduling on page 292
Setup Considerations: Candidate Personal Information on page 334
Setup Considerations: Notifications for Candidates on page 318

Setup Considerations: External Career Sites on page 357
Setup Considerations: Branding for External Career Sites on page 362
Setup Considerations: Job Postings on page 410
Setup Considerations: Recruiting Agencies on page 421
Setup Considerations: Referrals and Endorsements on page 433
Setup Considerations: Questionnaires for Recruiting on page 451
Setup Considerations: Interviews on page 468
Setup Considerations: Offers on page 483
Setup Considerations: Extended Enterprise Learning on page 2110

Tasks

Steps: Set Up Internal Hiring and Transcript Transition for Extended Enterprise Learners on page 2124
Steps: Set Up Auto-Initiate Offers and Employment Agreements on page 204

Reference

Workday Community: Suggested Jobs for External Candidates
The Next Level: One Stop Recruiting
The Next Level: All Things 2021R1 in Recruiting
The Next Level: All Things 2020R1 in Recruiting
The Next Level: All Things 2020R2 in Recruiting
The Next Level: COVID-19 Webinar - Adapt to Changing Recruitment and Hiring Needs
The Next Level: All Things 2022R1 in Recruiting
The Next Level: HCM Touchpoints with Assignments

Setup Considerations: Skills in Recruiting

You can use this topic to make decisions when planning to use skills in Recruiting. The topic 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 Is

Workday offers a variety of ways to add, maintain, and select skills for:

- Job Requisitions
- Job Applications
- Prospect Profiles
- Candidate Profiles

Prospects and candidates can identify their skills that match your job requirements, and you can search for candidates with the most relevant skills.

This topic explains the differences between configuration options for skills, enabling you to make an informed decision about using skills for Recruiting.

Workday Solution	Description
Machine Learning for Recruiting	Workday uses a machine learning algorithm and integration with Skills Cloud to suggest skills based on similar worker profiles and job requisition data. Recruiters can select required

Workday Solution	Description
	or optional skills for job requisitions. Candidates can select suggested skills when applying to a job. Prospects can select suggested skills on the Prospect Introduce Yourself form.
Skills Cloud	The Skills Cloud is a library of skills. Prospects, candidates, and recruiters can add these skills during the recruitment process. You can also use Skills Cloud to build qualification requirements.
Crowdsourced Skills	If a skill isn't available in your tenant, prospects and candidates can create crowdsourced skills to add to their profiles. See:Concept: Crowdsourced Skills and Experience Management.
Maintained Skills	You can maintain a list of skills specific to your organization that recruiting administrators, prospects, and candidates can add to profiles.

Business Benefits

You can streamline the process of working with skills using any combination of solutions, which:

- Use machine learning intelligence to adapt skills suggestions over time and improve efficiency and accuracy.
- Improve identification of candidates based on the relevant skills that they select.
- Enable prospects and candidates to select and create skills for better job matches.
- Maintain skills data, including skills specific to your company, for roles specific to your company.

Use Cases

Solution	Use Case
Machine Learning for Recruiting	Candidates can review and accept suggested skills as the best matches when they apply for a job. Prospects can select suggested skills after they upload their resume on the Prospect Introduce Yourself form. When creating a job requisition, you can review and accept suggested skills as required or optional for the job requisition.
Skills Cloud	Prospects and candidates can access a library of skills to add to their profiles. You can convert crowdsourced and maintained skills to Skills Cloud skills. You can also view reports based on selected skills.
Crowdsourced Skills	You can increase the number of skills for prospects and candidates to add to their profiles without using Skills Cloud.
Maintained Skills	You can create a categorized list of specialized and proprietary skills for your company.

Questions to Consider

When setting up machine learning for job requisitions and suggested skills in Recruiting, consider:

Questions	Considerations
How do you want to manage machine learning for Recruiting?	Machine learning automates the process of managing skills, but you can delete suggested skills from job requisitions.
Does machine learning consider more than the Skills section of a resume to suggest skills for job applicants?	Machine learning uses logic to consider matches from the entire uploaded resume, not just the Skills section, including: • Certificates • Company • Degree • Description • Education • Experience • Honors • Major and minor • Objective • Publication • Skills • Summary

When setting up Skills Cloud for Recruiting, consider:

Question	Considerations
Where does Skills Cloud get its data?	Skills Cloud gets its data from: • Public data sets. • Purchased data sets.
How do I get skills onto a prospect, candidate, and job requisition?	Convert maintained skills to Skills Cloud skills on prospect and candidate profiles. Workday automatically converts duplicate maintained skills to Skills Cloud skills if they're an exact text match. You can also use web services to load Skills Cloud skills by reference ID or an exact text match. If there's no exact text match and no reference ID, Workday creates a: • Crowdsourced skill for candidates. • Maintained skill for the Qualifications tab on job requisitions.
How does automated skill management work and how does it impact skills on candidates?	Workday Skills Cloud performs regular automated background processes to clean up duplicate and synonymous skills in your tenant. Workday always retains the skill string that a candidate enters, even if that skill gets added as a synonym or canonical skill to the Skills Cloud.

When managing crowdsourced skills, consider:

Question	Considerations
How do you want candidates to submit crowdsourced skills?	External candidates can add skills on their job application, which become part of their candidate profile. You can view crowdsourced skills on the Find Skill report.
Can you view crowdsourced skills in the Maintain Skills report?	Crowdsourced skills don't display in this report.

When managing maintained skills, consider:

Question	Considerations
Do you need Skills Cloud to use maintained skills?	Maintained skills don't require Skills Cloud, but if you enable Skills Cloud, you can convert maintained skills into Skills Cloud skills.
How do you manage maintained skills?	For maintained skills, you can: • Add skills, find duplicate skills, and manage translations. • Merge duplicate skills. • Create categories for skills.
How do you want to search for candidates by maintained skill?	Use the Find Candidates report if you haven't converted the skills to Skills Cloud skills.

Recommendations

No impact.

Requirements

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.

Understand how Workday implements machine learning when you:

- Set up machine learning for suggested skills and job requisitions. See Steps: Set Up Machine Learning for Recruiting on page 201.
- Set up Skills Cloud skills. See Steps: Set Up Skills Cloud on page 1852.
- Set up maintained skills. See Steps: Maintain Skills on page 1828.

Limitations

- You can't disable Skills Cloud skills once you enable it.
- Reports don't differentiate between suggested skills and skills selected by prospects or candidates.

Tenant Setup

No impact.

Security

Configure these security domains in the Recruiting functional area:

Domains	Considerations
Staffing Actions: Job Requisition Qualifications	Controls the visibility of suggested skills on job requisitions.
Set Up: Skills and Experience	Enable the Workday Skills Cloud.
Self-Service: Candidate	Enables candidates to enter crowdsourced skills.

Business Processes

No impact.

Reporting

You can manage skills with these reports:

Reports	Considerations
Find Candidates	Filter candidates by Skills Cloud skills and maintained skills.
Find Skill	Workday stores crowdsourced data in this report.
Maintain Skills	Add, search for, and edit maintained skills. You can also hide skills from candidates and flag skills as inactive.

Integrations

These web services support skills in Recruiting:

Solution	Web Services
Machine learning for job requisitions	• *Evergreen Requisition* • *Job Requisition*
Machine learning for suggested skills	• *Tenant Setup – HCM*
Skills Cloud skills	• *Candidates* • *Evergreen Requisition* • *Job Profile* • *Job Requisition* • *Manage Skills* • *Position* • *Position Restrictions* • *Recruiting Agency Candidate* • *Skill Profile*

Connections and Touchpoints

Skills in Recruiting interact with Talent features in Workday. You can search for workers by skill. You and workers can also select skills to include in their worker profiles.

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: Maintain Skills on page 1828

Reference

2024R1 What's New Post: Skills Cloud for Candidate Pools and Prospect Introduce Yourself

Workday Community: Available Innovation Services – Service Descriptions and Exhibits

Setup Considerations: Recruiting Notes

You can use this topic to help make decisions when planning your configuration and use of notes. 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

Recruiting notes enable users to create and view notes on job requisitions and candidate job applications.

Business Benefits

- Notes support collaborative hiring by allowing recruiters, hiring managers, and interviewers to share updates during candidate assessments.
- Protect data and ensure compliance by keeping all notes in Workday rather than in third-party tools.
- Preserve candidate history by keeping notes attached to candidates across requisitions for long-term visibility.
- Accelerate decision making by giving hiring teams timely context and consistent information.
- Increase efficiency by reducing duplicate communication channels and making notes easily searchable.
- Increase accountability by creating a clear, auditable record of hiring interactions and decisions.

Use Cases

Hiring managers, recruiters, and other hiring team members can use notes to:

- Communicate updates to job requisitions or job applications.

  Example: A recruiter adds a note that a candidate has completed their technical assessment so the application can be advanced to the interview stage.
- View and track recruiting and hiring activity on job requisitions and job applications.

  Example: A hiring manager adds a note after reviewing feedback from the candidate's phone screen.
- Discuss decisions to close or progress a job requisition or a job application.

  Example: A recruiter adds a note that the hiring team agreed to move a candidate forward to the final interview stage.
- Share feedback among hiring team members.

  Example: An interviewer adds a note that the candidate showed strong presentation skills but struggled with a technical case question.

- Reference external candidate materials.

  Example: A recruiter adds a note about a candidate's GitHub repository asking managers to review coding samples.

Questions to Consider

Question	Consideration
What kind of recruiting activity do you want users to create notes for?	You can enable users to add, view, or modify notes on: • Candidates • Candidate job applications • Job requisitions • Prospects Users must have access to the candidate profile to add notes to a candidate's job application.
Which roles do you want to enable to add or view notes?	You can enable users to view notes or view and modify notes. Users can only see notes for candidates, job applications, prospects, and job requisitions that they have access to. You can use the Maintain Recruiting Notes task to hide notes for masked candidate job applications.
Do you want to tag and notify other members of the hiring team on Recruiting Notes?	You can tag members of the hiring team by selecting their name or searching for them in the People to Notify prompt. Tagging and notifications on Recruiting Notes enhance recruiting efficiency by: • Improving collaboration among hiring team members during candidate assessments. • Enabling faster decision making by speeding up responses. • Streamlining communication by reducing the need for separate messaging threads.

Recommendations

No impact.

Requirements

Your organization must use session storage in order to store notes data. Check your browser settings or confirm with your IT team.

Limitations

You can only currently add or view notes on job requisitions or candidate job applications.

Recruiting Notes are only available on desktop.

Tenant Setup

No impact.

Security

Domain	Consideration
Manage: Candidate Job Application Notes	Enables you to add, edit, and view notes on candidate job applications from the candidate profile.
Manage: Job Requisition Notes	Enables you to add, edit, and view notes on job requisitions.
Manage: Maintain Recruiting Notes	Enables you to use the Maintain Recruiting Notes task to view or delete notes. This task is for administrators.
Manage: Candidate Notes	Grants access to add, edit, and view notes on the candidate and prospect profile.

Business Processes

Business Process	Consideration
Job Application	When you rescind or cancel a job application event, Workday removes any notes associated with the job application.
Job Requisition	When you rescind or cancel a job requisition event, Workday removes any notes associated with the job requisition.

Reporting

You can use these data sources to create custom reports on notes:

- Candidate Job Application Notes
- Candidate Notes
- Job Requisition Notes

Integrations

No impact.

Connections and Touchpoints

When you purge a user, Workday removes their name from any notes they created. Optionally, you can also purge the content of their notes. When you purge a candidate, Workday also purges the job application or the notes on the candidate job application.

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

Workday hides notes for masked candidate job applications on the candidate profile and the Maintain Recruiting Notes task.

Related Information

Tasks

Steps: Set Up Recruiting Notes on page 206

Reference

2022R1 What's New Post: Job Requisition Notes

2022R1 What's New Post: Candidate Job Application Notes

Steps: Set Up Recruiting

Context

Workday Recruiting enables your hiring teams to find, engage, and select candidates for your job openings.

You can also use Recruiting on the Workday mobile app for:

- Android.
- iPad.
- iPhone.

Steps

1. Access the Maintain Functional Areas task.

   Select the Enabled check box for the Recruiting functional area.

   Security: *Security Configuration* domain in the System functional area.
2. Access the Edit Tenant Setup - Recruiting task.

   Configure tenant-level settings for Recruiting features.

   See Reference: Edit Tenant Setup - Recruiting.
3. (Optional) Access the Edit Tenant Setup - System task.

   Enable activity streams for prospects and job applications so your workers can post comments to collaborate. These changes take effect after you sign out of Workday and sign-in again.

   See Steps: Enable Activity Stream.
4. Configure the Workday-delivered Recruiting dashboard.

   Security: *Management Dashboard: Recruiting* domain in the System functional area.

   See Steps: Set Up Dashboards and Landing Pages.
5. Steps: Set Up Profiles and Profile Groups.

   Configure these profiles and their profile groups:

   - Candidate Pool
   - Candidate Profile
   - Job Requisition Composite View
   - Prospect Profile
   - Referral Activity Composite View
6. Set Up Assignable Roles.

   Create a Recruiter role and assign it to your organizations.
7. Set up and create 1 or more external career sites.

   External career sites enable candidates to find and apply to job openings. Workers can share job postings to their social networks or use them to refer candidates.

   See Steps: Set Up External Career Sites on page 366.

8. Create internal career sites.

   You can create:

   - A site that enables workers to apply to internal job openings.
   - Multiple sites that enable nonworkers with a Workday account, such as students and contingent workers, to apply to internal job openings.

   See Steps: Set Up Internal Recruiting on page 371.
9. Set up Recruiting-specific job requisition features.

   See Steps: Set Up Job Requisitions for Recruiting on page 220.
10. Set up evergreen requisitions.

    Use evergreen requisitions to source and track candidates continuously for seasonal or high-volume positions.

    See Steps: Set Up Evergreen Requisitions on page 236.
11. Set up job postings.

    You can post jobs to these types of career sites:

    - Internal
    - External
    - Recruiting agency

    See Steps: Set Up Job Postings on page 413.
12. Set up recruiting agencies.

    Manage your relationship with third-party recruiting agencies through Workday. Recruiting agents can submit candidates to your job postings directly. You can see agency performance metrics, such as:

    - Number of candidates submitted.
    - Time to the first candidate interview.

    See Steps: Set Up Recruiting Agencies and Agency Users on page 425.
13. Set up job applications to configure the data you collect from candidates who apply to jobs.

    See Steps: Set Up Job Applications on page 445.
14. Configure how a candidate moves through the recruiting process.

    See Steps: Set Up the Recruiting Workflow on page 193.
15. Configure prospects and candidates.

    Specify the:

    - Candidate information that Workday collects and stores, as well as how Workday processes that information.
    - Security permissions for internal and external candidates.

    See Steps: Set Up Prospects and Candidates on page 245.
16. Configure referrals.

    Referrals enable your workers to refer their connections to job postings. Candidates can also specify a worker they know at your company as a self-identified referrer. You can configure Workday to process payments for successful referrals and approved endorsements based on condition rules.

    See Steps: Set Up Referrals on page 437.
17. (Optional) Steps: Set Up Recruiting Notes on page 206

    Enable users involved in the hiring process to collaborate, communicate, and track recruiting activity by adding and viewing notes on job requisitions and candidate job applications.
18. (Optional) Create Custom Labels.

    Use the Maintain Custom Labels task to rename Workday terms such as prospect, contingent worker, or evergreen requisition. These values display in object names and search results.

19. (Optional) Create and Edit Custom Object Definitions.

    Create custom objects to track additional fields that Workday-delivered objects don't include. Example: Create a custom object to track recruiting agency payments from a specific cost center.

Related Information

Concepts

Setup Considerations: Recruiting Notes on page 188

Tasks

Steps: Set Up Job Catalog on page 568

Set Up Recruiting to Staffing Field Defaults on page 205

Steps: Set Up Recruiting Notes on page 206

Examples

Example: Return Candidate to the Recruiting Process on page 281

Steps: Set Up the Recruiting Workflow

Prerequisites

Security: *Set Up: Recruiting* domain in these functional areas:

- Recruiting
- Talent Pipeline

Context

You can configure your recruiting process using Workday-provided stages, and include steps such as:

- *Automatic Stage Routing*
- *Automatically Unpost Jobs*
- *Change Government IDs*
- *Change Personal Information*
- *Document Review*, including electronic signatures

Workday automatically assigns candidates applying to a job to the Review stage. From there, you define the stages a candidate can move to. They can be:

- Linear: Move a candidate to a specific stage in a specific order. Example: Review to Screen, to Interview, to Reference Check, to Offer, to Ready for Hire.
- Flexible: Select from a list of stages to move a candidate to. Example:
    - Review to Screen, Assessment, or Interview
    - Screen to Assessment or Interview
    - Interview to Reference Check, Background Check, or Ready for Hire

Steps

1. Set up electronic signatures.

   To enable candidates to sign documents electronically, add a *Review Documents* type step on any subprocess of the *Job Application* business process for the *Candidate as Self* group.

   See:

    - Set Up DocuSign
    - Set Up Adobe Sign
    - Set Up Review Documents Steps

2. Create Custom Business Processes.

   Configure these business processes for your organization:

Stage	Corresponding Business Processes
Review	*Review Candidate*
Screen	*Screen*
Reference Check	*Reference Check*
Ready for Hire	• *Add Additional Job* • *Change Job* • *Contract Contingent Worker* • *Hire Employee*

   Use the External Site Homepage Link report field to direct candidates to your external career site when you:

   - Configure a business process to include parallel Candidate Home action steps such as *Change Government Identifiers* or *Change Personal Information*.
   - Create custom notifications for candidates.

   Configure business process steps that you might identify as high-volume as they're displayed in My Tasks. On a business process definition, you can apply the exclude task configuration on these step types so that it doesn't deliver notifications to My Tasks:

   - *Action*
   - *Approval*
   - *To Do*

   Once a step is configured for exclusion, you can still access any excluded task in My Tasks from the Recruiter Hub.
3. Configure the Assessment stage.

   See Steps: Set Up Assessments for Candidates on page 463.
4. Configure the Interview stage.

   See Steps: Set Up Interviews on page 472.
5. Configure the Offer stage.

   See Steps: Set Up Offers on page 489.
6. Configure the Employment Agreement stage.

   See Steps: Set Up Employment Agreements on page 635.
7. Configure the Background Check stage.

   See Steps: Set Up Background Checks for Candidates on page 260.
8. (Optional) Steps: Set Up Parallel Stages on page 200.

   Configure parallel stages.
9. Create Recruiting Dispositions.
10. Configure the *Job Application* dynamic business process.

   See Steps: Configure the Job Application Business Process on page 197.

11. (Optional) Access the Configure Dynamic Action Labels task for the *Job Application* business process type.

    You can change the name of the stage a candidate or agency user sees when reviewing information.

    As you complete the task, consider:

Option	Description
Action Label Override	Enter a label that displays to internal users when they move candidates through the recruiting process.
External Label Override	Enter a label that displays on the: • Communications sent to external and internal candidates. • Active Posting tab on the View Recruiting Agency report.

12. (Optional) Set up task consolidation for Recruiting business processes.

    See Steps: Set Up Task Consolidation.

Result

When a candidate applies for a job, Workday:

- Creates a job application and associates it with the candidate record.
- Sets the status of the candidate to *Review*.

Next Steps

You can configure:

- Workday to decline the remaining job applications for a hired candidate.
- A condition rule on the *Initiation* step of the *Hire* business process. Ensure:
    - Source External Field or Condition Rule: Job Application Business Process Created From
    - Relational Operator: Is empty
- The Undo Move from Hire action to move a candidate from the hire process back to the Make Decision step of the last recruiting stage they were in.

Related Information

Tasks

Steps: Automatically Decline a Candidate's Remaining Job Applications on page 268

Steps: Automatically Advance or Decline Candidates on page 266

Steps: Enable Candidates to Withdraw Their Job Applications on page 446

Create Business Process Condition Rules

Examples

Example: Return Candidate to the Recruiting Process on page 281

Steps: Set Up Recruiting Hub

Prerequisites

Create 1 or more configurations for the candidate list grid.

Context

The Recruiting Hub enables recruiters to manage their workload more efficiently. Recruiters can use the Recruiting Hub to take action on candidates in different stages. You configure the Recruiting Hub, but recruiters can customize their experience to:

- Display information they want to see.
- Monitor candidate activity.
- Navigate quickly between tasks.

Steps

1. Edit Domain Security Policies.

   Configure these domains in the Recruiting functional area:

   - *Recruiting Hub*: Enable Recruiting Hub by adding security groups to this domain. Use role-based, unconstrained security groups with view and modify access.
   - *Job Requisition Workspace*.
   - *Candidates for My Jobs*: Defines who has access to the information that displays on the Recruiting Hub. Workday recommends that you assign the role tied to job requisitions. Example: *Primary Recruiter*.
2. (Optional) Configure the announcements and cards that display on the Recruiting Hub.
   a) Access the Maintain Hubs task.
   b) From the *Recruiting Hub* row, select Action > Configure Overview.

   Security: These domains in the System functional area:

   - *Set Up: Tenant Setup – General*
   - *Set Up: Tenant Setup – Hubs*
3. (Optional) Configure the candidate information that displays on the candidate cards and reports in the Recruiting Hub. Examples: Application date, candidate location, list of degrees and veteran status.
   a) Access the Maintain Candidate List Assignment task.
   b) From the Internal Candidate Grid and Referral Candidate Grid prompts in the Recruiting Hub section, select the grids that you want to display.

   Security: *Set Up: Recruiting* domain in the Recruiting and Talent Pipeline functional areas.
4. (Optional) Configure user roles on the Job Requisition Workspace report.
   a) Access the Maintain Job Requisition Workspace task.
   b) Select a Default Role. Workday recommends selecting your most commonly used role as the default for the workspace. Example: *Primary Recruiter*.
   c) Add up to 4 additional recruiting roles, which act as filters on the workspace. When users access the workspace, the Owned By Me filter automatically displays results relevant to the selected role. It can take up to an hour for changes to your role selections to display.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.
5. Access the Configure Recruiter Hub Shortcuts task.

   Define default shortcuts for security groups with access to the Recruiting Hub. They can personalize their shortcuts from the Shortcuts section of the Recruiting Hub navigation.

   Security: *Set Up: Tenant Setup – General* domain in the System functional area.

6. (Optional) Replace the Workday-delivered Recruiting dashboard in the navigation with a custom dashboard.
    a) Access the Maintain Recruiter Hub Navigation Menu Overrides task.
    b) From the Navigation Item prompt, select *Recruiting - Dashboard*.
    c) Select either the custom dashboard that you want to display in the Recruiting Hub from the Override prompt, or the Do Not Show check box. The Workday-delivered dashboard will no longer display.

    Security: *Set Up: Tenant Setup – General* domain in the System functional area.

Steps: Configure the Job Application Business Process

Prerequisites

- Create Recruiting Dispositions on page 208.
- Security: *Security Configuration* domain in the System functional area.

Context

You can use Workday-delivered stages to configure the path that candidates follow in recruiting on the *Job Application* business process. From each stage, you can select the:

- Stages you want available as possible next steps for moving a candidate forward.
- Options for removing the candidate from the recruiting process.

If you want to renegotiate the terms, you can add the Offer and Employment Agreement stages twice. Use label overrides to distinguish between 2 stages with the same name.

Workday uses the job application of a candidate date to determine which *Job Application* business process definition to use.

Steps

1. Access the *Job Application* business process definition.
2. Click Edit Dynamic Definition.
3. Select the groups that can initiate the business process on the Initial Step grid.
4. As you complete the Possible Next Steps grid for each stage, consider:

Option	Description
Specify	Select the stages that the candidate can move to from this stage. You can select any stages, including the current one. After you add the *Ready for Hire* step and click OK, Workday automatically populates the Completion Event row with these business processes: • *Add Job* • *Change Job* • *Contract Contingent Worker* • *Convert to Employee* • *Hire Employee*
Automatically Initiate	This check box only appears when you add 1 of these options on the Specify column: • *Offer*

Option	Description
	• *Employment Agreement*
Group	Select from the security groups you added on the security policy of the *Job Application* business process. If you leave this field blank, Workday sends notifications to the role defined on the subprocess definition for that step. If you select *Initiator* as the group for step b on a subprocess definition, you must select a Group.
Step Label Override	The label you enter: • Becomes the label for the Move Forward option. • Displays on the Candidate tab of the job requisition and on mass action tasks.

5. For integration steps, select Business Process > Maintain Redirect from the related actions menu of an integration step.

   Configure a redirect to prevent the job application process from canceling when the integration fails.
6. (Optional) As you complete the Possible Parallel Steps grid, consider:

Option	Description
Specify	Select the parallel stages you want to run in parallel. Ensure that the *Decision* step is also the *Completion* step on any parallel stage.
Automatically Initiate	Only appears when you add 1 of these options on the Specify column: • *Offer* • *Employment Agreement*
Group	Add the security groups that you want to initiate parallel stages.
Step Label Override	The label you enter: • Becomes the label for the Move Forward option. • Displays on the Candidate tab of the job requisition and on mass action tasks.

7. As you complete the Possible Dispositions grid for each stage, select 1 or more reasons for declining the job application of a candidate.

   If you leave this section blank, the Decline button doesn't display on the task associated with the stage.
8. Configure Custom Notifications.

   Configure custom notifications that send to candidates based on disposition reasons by using the On Disposition prompt in the Triggers section.
9. (Optional) Access the Maintain Business Process Definition Selection report.

   For the *Job Application* business process, click Enable Use Latest Dynamic Business Process. This selection changes the effective date of any *Job Application* subprocess to the date the business process initiates it. Selecting this option ensures that you always use the most current definition for all subprocesses.

Security: *Business Process Administration* domain in the System functional area.

10. (Optional) From the related actions menu of the *Job Application* business process, select Business Process Type > Maintain Business Process Definition Selection.

As you complete the task, consider:

Option	Description
Use Subprocess Initiation Date	Select to use the most recent business process definition for Recruiting-related subprocesses in the *Job Application* dynamic business process.
Use Latest Business Process Definition	Select to use the most recent definition for the *Job Application* dynamic business process.

Next Steps

Configure automatic stage routing so you can use condition rules to advance or decline candidates automatically.

Related Information

Tasks

Steps: Automatically Advance or Decline Candidates on page 266

Reference

2024R1 What's New Post: Notification Trigger on Disposition

Steps: Set Up Segmented Security for Recruiting Stages

Prerequisites

Security: *Set Up: Security Segments* domain in the System functional area.

Context

You can restrict access to job application information based on these stage-related security segments:

- Job Application - Assessment
- Job Application - Background Check
- Job Application - Declined by Candidate
- Job Application - Employment Agreement
- Job Application - Interview
- Job Application - Offer
- Job Application - Ready for Hire
- Job Application - Reference Check
- Job Application - Rejected
- Job Application - Review
- Job Application - Screen

Recruiters can only view information that they have permission to view based on the stage of the job application on these tasks, reports, and profiles:

- Candidate Pipeline.
- Candidate profile.
- Candidate Time Per Stage.
- Compare My Candidates.

- Evergreen profile.
- Internal Sourced Candidates.
- Job requisition profile.
- My Applications.
- My Candidates.
- My Job Applications.
- Source Effectiveness.
- Source to Pipeline.

Steps

1. Create Segment-Based Security Groups.

   Create a security group that grants specific security groups access to specific security segments.
2. Edit Domain Security Policies.

   Update the security policy for these domains on the Recruiting functional area:

   - *Candidate Data: Job Application*
   - *Candidate Data: Other Jobs*
   - *Candidates for My Jobs*
3. Activate Pending Security Policy Changes.

Result

Only users with segmented security can view candidate job application information based on the recruiting stage of the candidate's job application.

Steps: Set Up Parallel Stages

Prerequisites

- Configure the *Job Application* business process. See Steps: Configure the Job Application Business Process.
- Confirm that your subprocess *Completion* steps are also your *Make Decision* steps on the *Job Application* business process.

Context

Parallel stages improve recruiter efficiency by enabling candidates to be in more than 1 stage in the job application process at the same time. However, a candidate can only receive 1 offer or employment agreement at a time.

Steps

1. Access the Maintain Feature Opt-Ins report.

   Enable the Dynamic Parallel Stages feature.

   Note: You can't disable Dynamic Parallel Stages once you enable it.
2. Edit Business Process Security Policies.

   For the *Job Application* business process, add security groups to the Initiate Parallel Step action.
3. For each primary stage from which you want to initiate parallel stages, complete the Possible Parallel Steps section on the *Job Application* business process.

   See Steps: Configure the Job Application Business Process on page 197.

4. (Optional) Access the Maintain Business Process Definition Selection task.

   To enable parallel stages on existing job applications, click Enable Use Latest Dynamic Business Process for the *Job Application* business process type.

Example

To initiate the Background Check stage once a candidate accepts a verbal offer, configure these stages to run at the same time:

- *Offer* or *Employee Agreement* (Primary)
- *Background Check* (Parallel)

Steps: Set Up Machine Learning for Recruiting

Prerequisites

For suggested jobs, configure the *Candidate as Self* security group to enable modify access on these domains in the Recruiting functional area:

- *Self-Service: Candidate*
- *Self-Service: External Recommended Jobs*

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

You can enable machine learning for Recruiting to display:

- Suggested skills on job applications, job requisitions, and the Prospect Introduce Yourself page.
- Suggested jobs to external candidates.
- Skills Cloud skills to create dynamic candidate pools.

Candidates can view and select suggested skills when entering skills on their job application. Workday bases the suggestions on an external candidate’s uploaded documents when using the *Quick Apply* option. For internal candidates, the suggested skills are based on several factors from the worker profile, such as their:

- Skills
- Current job title and job description

- Job history
- Projects
- Public feedback
- Completed Learning courses

You can view suggested skills for job requisitions on the Skills section when you create or edit a job requisition. Workday bases suggested skills on similar worker profiles and the data that you enter for these fields on the Job section:

- Job Posting Title
- Job Description
- Additional Job Description
- Job Description Summary

Prospects can view and select suggested skills on the Prospect Introduce Yourself page. Candidate Engagement customers can enable prospects to select skills when they register for a recruiting event.

External candidates can view active job suggestions on the:

- Candidate Home page of an external career site.
- Job Posting page, whether they sign in to their account or not.

Workday suggests jobs based on jobs the candidate:

- Applies to.
- Views.

Steps

1. Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers.

   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.

   On the Innovation Services Opt-In task, select the HCM ML Features and Third Party Connectors GA service on the Available Services tab in the HCM category.
2. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality.

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.
3. Access the Maintain Skills and Experience Setup task.

   To enable suggested skills, select these check boxes:

   - Enable Workday Skills Cloud
   - Populate Suggested Skills for Workers
   - Populate Suggested Skills for Internal Candidates
   - Populate Suggested Skills for External Candidates and Prospects
   - Populate Suggested Skills on Job Requisitions

Result

There's a delay from when you enable Skills Cloud and our background jobs complete processing maintained skills in your tenant. Workday displays suggested jobs within 24 hours. When you post a new job requisition or update an existing one, Workday displays those changes in the Suggested Jobs section within 24 hours. For creating dynamic candidate pools using Skills Cloud skills, we recommend waiting a minimum of 1 week before reviewing the remaining maintained skills and the results from your dynamic candidate pool. See Concept: Automated Skill Management

Next Steps

You can test the feature in your Implementation tenants by accessing the Maintain Weekly Machine Learning Activation for Implementation Tenant task and selecting the Extract for Implementation Tenant check box for the Machine Learning Innovation Service you wish to use.

You can't test the feature in your Sandbox tenant. Workday no longer enables machine learning data extraction in Sandbox.

Related Information

Reference

Workday Community: Suggested Jobs for External Candidates

2024R1 What's New Post: Skills Cloud for Candidate Pools and Prospect Introduce Yourself

2023R2 What's New Post: Suggested Skills on Internal Apply

Workday Community: Available Innovation Services – Service Descriptions and Exhibits

Steps: Add Notification Delays to Recruiting Business Processes

Context

Workday enables you to add a timed delay to custom workflow notifications on recruiting-related business processes. Delaying a notification can prevent a candidate from receiving a rejection message immediately after they submit their job application.

You can create the delay using either the moment the trigger occurs or a report field and define the amount of time for the delay.

Delayed notifications don't work with attachments.

Steps

1. Create Notification Routing Rules.

   Create a routing rule that enables *Email* as a Channel and *Immediately* as the Default Frequency.
2. Access the Edit Tenant Setup - Notifications task.

   Select the Enable Reminders check box on the Reminder Settings section.

   On the Notification Delivery Settings section, select the Business Processes parent notification type. Add the new routing rule in the Rule prompt on the Custom Business Process Notifications notification type.
3. Access the business process definition for 1 of these business processes:

   - *Assessment*
   - *Background Check*
   - *Employment Agreement*
   - *Interview*
   - *Job Application*
   - *Ready for Hire*
   - *Reference Check*
   - *Review*
   - *Screen*
4. From the related actions menu, select Business Process > Add Notification.
5. Complete the Triggers section.

   The trigger for the delay can be a disposition status, or an entry or exit step in the business process definition.

6. Complete the Delay Notification section.

   Workday displays this section when you must select the Enable Reminders check box on the Edit Tenant Set Up - Notifications task.

   The timing of the delay can be the moment the trigger occurs or a report field. You can define the amount of time for the delay. A 1-day delay occurs at midnight of the next day.

Result

You can view pending notifications using the:

- Pending Notifications grid on the All Events profile on the Full Process Record task.
- Delay column on the Custom Notification section on the business process definition.
- Pending Business Process Notifications report. In the Functional Area prompt, you can select the Recruiting functional area to view pending recruiting notifications.

Candidates won't see their job application disposition until they receive the delayed notification. The notification delay also applies to the job application status on the Candidate Home page of an external career site.

Related Information
Reference
Reference: Edit Tenant Setup - Notifications

Steps: Set Up Auto-Initiate Offers and Employment Agreements

Context

You can configure the *Offer* and *Employment Agreement* business process steps to automatically initiate and send an offer and employment agreement to the candidate quicker. Auto-initiate for the *Offer* step only works when salary or hourly are the only forms of compensation in the offer. This doesn't work if the compensation includes other forms of compensation such as:

- Allowance
- Bonus
- Commission
- Merit
- Other
- Period
- Salary
- Stock
- Unit Salary

When a user moves the job application to the step that's been selected for auto-initiation, Workday automatically submits the offer or employment agreement to the candidate. The candidate can then review the documents and complete any related tasks.

Steps

1. Set Up Recruiting to Staffing Field Defaults on page 205.

   On the Maintain Staffing Field Defaults task, on the Employment Agreement or Offer tabs:

   a. Select either the *Contract End Date* or *Hire Date* for the Field.
   b. Select the Report Field or enter the default date for the Specific Value.
2. Configure the *Job Application* business process.

   See: Steps: Configure the Job Application Business Process on page 197.

3. On the *Job Application* business process definition, select *Offer* or *Employment Agreement* on the Specify field on the Possible Next Steps or Possible Parallel Steps grids for any step and select the Automatically Initiate check box.

   Note: If you have *Approval* and *Review* steps set up, the auto initiate offer step still completes in the business process. If any required fields are missed in the business process, the *Offer* or *Employment Agreement* steps don't auto-initiate.

Next Steps

Test auto-initiation thoroughly to confirm that the necessary fields are filled out for the candidate's offer or employment agreement.

Set Up Recruiting to Staffing Field Defaults

Prerequisites

Set up these business processes in the Staffing functional area:

- *Add Additional Job*
- *Change Job*
- *Contract Contingent Worker*
- *Hire*

Set up Workday Recruiting.

Context

You can set up Workday to populate these fields when you move a candidate to the Ready for Hire stage in Workday Recruiting:

- Benefits Service Date
- Company Service Date
- Continuous Service Date
- Cost Center
- First Day of Work
- Insider Types
- Job Classification
- Job Title
- Pay Rate Type
- Work Shift
- Worker's Compensation Code Override

These defaults apply only to these Staffing business processes:

- *Add Additional Job*
- *Change Job*
- *Contract Contingent Worker*
- *Hire*

When you configure this feature, you:

- Improve the flow of data from Workday Recruiting to Workday HCM.
- Reduce data entry and errors.
- Support autocomplete for staffing events in Workday HCM.

Steps

1. Access the Create Staffing Field Defaults Condition Rule task.

   Create a set of rules that you can use to determine when to populate a specific field.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
2. (Optional) Create Calculated Fields.

   Create custom fields to use in staffing field defaults. Select the Staffing Field Defaults business object.
3. Access the Maintain Staffing Field Defaults task.

   Select a business process tab. Associate 1 or more condition rules for specific staffing fields in the business process and define the value that populates that field. As you complete this task, consider:

   - Workday processes rules in the order they display in the grid. Once a field meets the conditions for a rule, Workday ignores any remaining rules for that field.
   - You can't use calculated fields that contain sensitive data in the Report Field. Example: *Date of Birth*.
   - To ensure that a field always populates, create a row at the bottom of the grid where:
     - The Condition Rule field is blank.
     - The Value field has a value.
   - The Field that display are on the Staffing Field Defaults business object, and can be:
     - An existing Workday-delivered field.
     - Calculated fields you created.

   Security: *Set Up: Staffing* domain in the Staffing functional area.

Result

When you move a candidate to Ready for Hire, Workday applies the rules you created to populate fields in the staffing event. When an event has autocomplete enabled on the business process definition, Workday attempts to complete the event automatically with the information in the populated fields.

Related Information

Concepts

Setup Considerations: Autocomplete Staffing Events on page 519

Setup Considerations: Job Changes on page 838

Tasks

Hire Employees on page 690

Contract Contingent Workers on page 723

Add Additional Jobs on page 879

Steps: Set Up Recruiting Notes

Prerequisites

This feature requires session storage. Check your browser settings or contact your IT team to confirm whether your organization enables session storage.

Context

Users can collaborate, communicate, and track recruiting activity by adding and viewing notes on:

- Candidates.
- Candidate job applications.
- Job requisitions.

- Prospects.

Notes support collaborative hiring across recruiting and hiring team roles. Storing your notes in Workday reduces the need for third-party applications and potential data compliance issues.

Steps

1. Create Segment-Based Security Groups.

   Create security groups and give them appropriate view or modify access.
2. Edit Domain Security Policies.

   Configure these domains in the Recruiting functional area:

Domain	Description
Manage: Candidate Job Application Notes	Grants access to add, edit, and view notes at candidate-level on the candidate profile.
Manage: Job Requisition Notes	Grants access to add, edit, and view notes on job requisitions.
Manage: Maintain Recruiting Notes	Enables you to use the Maintain Recruiting Notes task to view or delete notes.
Manage: Candidate Notes	Grants access to add, edit, and view notes on the candidate and prospect profile.
3. (Optional) Create Custom Reports.

   You can use these data sources:

   - *Candidate Job Application Notes*
   - *Candidate Notes*
   - *Job Requisition Notes*

Result

To add a note, access the job requisition, candidate, or prospect profile. Select the note icon to expand the side panel, and select the Add a Note button.

To view or delete notes, access the Maintain Recruiting Notes task.

To purge notes, you can select these purgeable data types on the Purge Person Data task:

- Candidate Job Application Notes
- Candidate Notes
- Job Requisition Notes

Example

As a hiring manager, you can add a note to a job requisition to ask recruiters to inform candidates that the role involves 50% travel. Recruiters and others with access to job requisition notes can see and reply to this note.

Related Information

Concepts

Setup Considerations: Recruiting Notes on page 188

Reference

2022R1 What's New Post: Job Requisition Notes

2022R1 What's New Post: Candidate Job Application Notes

Create Recruiting Dispositions

Prerequisites

Security: *Set Up: Recruiting* domain in these functional areas:

- Recruiting
- Talent Pipeline

Context

Recruiting dispositions allow you to create reasons for declining a candidate's job application. You can assign dispositions to different stages of the Job Application business process, allowing recruiters to decline candidate applications.

You can create disposition categories:

- Before creating your dispositions in the Maintain Recruiting Disposition Categories task.
- As you create your dispositions.

Steps

1. Access the Maintain Recruiting Dispositions task.

   Create the reasons for declining a job application.
2. As you complete the task, consider:

Option	Description
Disposition Category	(Optional) Select the category for the disposition. You can access the Create Recruiting Disposition Category task from the prompt to create a category. Workday displays disposition categories as prompt categories in the Disposition Reason prompt when users are declining job applications.
Reason	Enter the name or a short description of the reason why a candidate job application is being declined. This is the primary explanation for the disposition.
Candidate Label Override	This field allows you to customize the label that candidates see in notifications related to their job application. Enter the name or description that you want to use instead of the Reason field for custom notifications to candidates. This label override displays when you use the Candidate Disposition Reason and Candidate Disposition Reason as Text report fields in custom notifications.
Maps to	Select if you want to map the disposition to either the *Rejected* or *Declined by Candidate* recruiting stage. This mapping helps to categorize and track the reasons for declining candidates within the job application process.

Result

You can manage disposition categories in the Maintain Recruiting Disposition Categories task.

Next Steps

Assign recruiting dispositions to stages of the Job Application process to allow recruiters to decline candidate applications.

Related Information

Reference

2024R1 What's New Post: Recruiting Disposition Categories

Concept: Parallel Stages

Overview

A parallel stage is a recruiting stage a candidate can be in at the same time as a primary stage. Workday categorizes stages as:

- Primary.
- Parallel.

You can configure the *Job Application* dynamic business process to define:

- The order in which candidates move through the recruiting process.
- The primary stages that can have parallel stages.

When configuring parallel stages on the *Job Application* business process, consider stages that aren't dependent upon another stage to complete before you begin it; such as:

- *Interview*
- *Background Checks*
- *Reference Checks*

Example, a company might want:

- A candidate to complete an assessment test (parallel) when they are in the interview stage (primary).
- Run a background check (parallel) when making an offer (primary).

You can use condition rules to refine when a parallel stage runs.

You can only run 1 offer or employment agreement stage at a time.

Parallel stages support automatic stage routing for declining candidates, but not automatic stage routing for moving candidates forward.

Start a Parallel Stage

Workday enables you to start a parallel stage for either an individual candidate or multiple candidates at a time.

For individual candidates, start a parallel stage from the:

- Start Parallel Stage button on the candidate profile.

  Note: The Start Parallel Stage button is separate from the Move Forward and Decline buttons and isn’t available on mobile devices.
- Job Application > Move Candidate related action menu on the candidate name.

For multiple candidates, start a parallel stage from these reports and tasks:

- Candidate Job Applications report accessed from the Recruiting Hub.

- Review Candidate report on the Recruiting Hub and the Job Requisition profile.
- View Internal Candidates report accessed from Recruiting Hub.
- View Referred Candidates report accessed from the Recruiting Hub.

When you start a parallel stage, Workday records the event in the Process History. You:

- Can only have 1 *Offer* or *Employment Agreement* in progress for a job application at any given time.
- Can configure stages to run at the same time if they don't depend on the completion of other stages. Example: *Interview* and *Reference Check*.
- Can't use the Move Forward task to move a candidate to another stage from a parallel stage.

Complete a Parallel Stage

Use the Move Forward task to complete a parallel stage that's in the *Make Decision* step. You can also move a candidate forward in a primary stage. However, you can only take 1 action at a time and it's recorded on the candidate's Process History report.

The Move Forward button displays only when a primary or parallel stage is in the *Make Decision* step in the applicable business process definition.

Workday completes all parallel stages when you hire a candidate or disposition a job application. To prevent Workday from completing the parallel stages, configure a condition rule.

Decline from a Parallel Stage

Workday enables you to decline a job application from an in-progress primary or parallel stage for:

- Individual candidates. Workday enhances the Decline button to include parallel stages. Declining enables you to select the disposition reason for a primary stage or a parallel stage.
- 1 or more candidates using the Candidate List report or candidate profile. The Decline Job Applications task also displays the dispositions for both primary and parallel stages.

Workday closes the job application and the entire job application event and records the action in the candidates' Process History report.

Reference: Search Prefixes for Recruiting

You can use prefixes in Workday Search to locate particular recruiting objects quickly. Search prefixes are lowercase letters, followed by a colon (:). You can use the search categories to narrow down your search results.

Object	Prefix	Example
Candidate	cand:	Search using the candidate's name, ID, or email address: • cand: s.lee@gms.com • cand: C00000087 • cand: sara lee
Candidate Pool	pool:	Search using the candidate pool name: • pool: sales candidates
Contingent Worker	worker:	Search using the contingent worker's name, ID, or email address: • worker: alice becker • worker: A06746

Object	Prefix	Example
		• worker: abecker@gms.com
Employee	worker:	Search using the employee's name, ID, or email address: • worker: sophie petit • worker: C00000037 • worker: s.petit@gms.com
Job Family	jobfamily:	Search using the job family name: • jobfamily: sales
Job Profile	job:	Search using the job profile name or ID: • job: accountant • job: A503004
Job Requisition	jr:	Search using the job posting title or job requisition ID: • jr: store clerk • jr: R00245
Location	loc:	Search using the location name: • loc: sydney
Pre-Hire	ph:	Search using the pre-hire's name or email address: • ph: david flores • ph: dflores@gms.com
Prospect	prospect:	Search using the prospect's name or ID: • prospect: evan smith • prospect: C00000088

Related Information
Reference
Reference: Search Workday

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 recruiting 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 recruiting setup.

Recruiting Profile Group

Report	Description	Example
Recruiting Performance Considerations	Displays recruiting configurations that don't meet Workday recommendations.	Identify report fields that you can update to improve performance.
Recruiting Tenant Level Settings	Displays recruiting configurations that don't meet Workday recommendations.	Verify tenant level configurations.

FAQ: Recruiting

Can I cancel a recruiting event?

If you have security access to the *Job Application* business process, you can cancel an *In Progress* event. This action also cancels all steps in the business process. The candidate can then reapply for the job.

How do I share job postings on social media networks?

To share jobs posted to both internal and external career sites:

1. Add either the *All Employees* or *All Contingent Workers* or both roles to the security policy on the Recruiting *Social Share* domain.
2. Select the countries where you want to enable social sharing using the Configure Social Sharing Targets task.

   Security: *Set Up: Social Sharing* domain in the System functional area.

When workers search for a job on your internal career site, they can click the social media icon on the job posting description page and sign in to their social media account. Workday creates a new posting with the *We're Hiring!* header and a link to the external job posting. The worker can edit the *We're Hiring!* text.

Can I include the same step multiple times in the Job Application business process?

Yes, but when you configure the *Job Application* business process, use Step Label Override to distinguish between the steps. Example: Phone Interview versus On-site Interview.

	If you want the notification sent to different people, configure: 1. The security policy for the applicable business processes. Enter *Initiator* in the Security Group field for all Action Steps: • Assess Candidate • Background Check • Interview • Offer • Ready to Hire • Reference Check • Review Candidate • Screen 2. The applicable business processes. Select *Initiator* as the security group for *Step b* (after the initiation step) in the *business process definition*. 3. The *Job Application* business process and select a specific role, such as *Recruiter* or *Manager*, in the Group field for the step.
Can I correct or rescind job requisition events?	You can correct or rescind a *Job Requisition* event when the *Post Job* business process is a step in the business process. *Job Requisition* events include events resulting from: • Close Job Requisition • Create Job Requisition • Edit Job Requisition *Job Requisition* events can be: • Corrected if the Recruiting Start Date is earlier than the Job Posting Start Date. Corrections don't reflect in active job postings. You have to remove the job posting and post the job again for the changes to display. • Rescinded when there aren't any job applications associated with the job. Workday also rescinds the job posting event.
How do I enable the career site from the Recruiting System account?	The Recruiting System account offers the ability to modify settings in the Edit Workday Account task. If the Account Disabled check box is selected, candidates can’t access the career site. To provide access, clear the check box. Additionally, if a date and time in the Account Expiration Date fields has passed, candidates can't access the career site. To provide access, clear the date fields.

Example: Configure a Flexible Recruiting Process

Context

This example illustrates a recruiting plan that enables complete flexibility in the recruiting process. Your company wants to be able to move candidates to any stage in the process and repeat any stage. For legal and security reasons, you must include reference and background checks.

Prerequisites

Create 2 candidate dispositions on the Maintain Recruiting Dispositions task:

- Doesn't meet requirements.
- Not interested.

Steps

1. Access the *Job Application* business process.
2. Click Edit Dynamic Definition and click OK.
3. In the Initial Step section, select *Recruiter* in the Group field.

   Only the recruiter can complete the *Review* stage.
4. For each stage, in the Possible Next Steps section, add these steps:

Specify	Group
Screen	Manager
Assessment	Manager
Interview	Manager
Reference Check	Recruiter
Offer	Recruiter
Background Check	Recruiter
Ready for Hire	Not available

   After you add the *Ready for Hire* step and click OK, Workday automatically populates the Completion Event with these business processes:

   - *Add Job*
   - *Change Job*
   - *Contract Contingent Worker*
   - *Convert to Employee*
   - *Hire Employee*
5. For each stage, select these dispositions in the Possible Conclusions section:

   - *Doesn't meet requirements*
   - *Not interested*

Job Requisitions for Recruiting

Setup Considerations: Job Requisitions for Recruiting

You can use this topic to make configuration decisions for job requisition functionality. It explains:

- Why to set it up.
- How this feature 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

With Workday Recruiting, you can use job requisition functionality to track requirements for unfilled positions or jobs and to move candidates through the recruiting process.

Business Benefits

By configuring job requisitions, you can:

- Improve recruiting efficiency by tracking candidate movement within the job requisition.
- Easily manage your job requisition activities using the Job Requisition Workspace.
- Ensure accurate high-volume recruiting by carrying out mass actions on the candidate grid.
- Increase the number of positions on your job requisitions to reflect your changing business needs.
- Report on your recruiting data to support your planning and compliance needs.
- Recruit for sensitive positions using confidential job requisitions.
- Highlight critical or difficult-to-fill job requisitions using Spotlight Jobs.
- Provide nonspecialist users, such as hiring managers, an easier way to create job requisitions.
- Quickly view the status of your in-progress job requisition events using the Workday Assistant chatbot.

Use Cases

You can use job requisition functionality to:

- Create a new position using recruiting data.
- Track requirements for unfilled positions or jobs.
- Replace a terminated worker.
- Increase the number of positions on a job requisition if your hiring needs change.
- Post to internal and external career sites to advertise jobs.
- Hire confidential candidates for sensitive positions.
- Create job requisitions using a simplified process.
- Request the details of your in-progress job requisition events using Workday for Slack or Workday for Microsoft Teams.

Questions to Consider

Questions	Considerations
How do you want to manage compensation details?	You can include compensation: • At your preferred stage of the *Job Requisition* business process. • As a part of the job requisition consolidated template.
What fields do you want to display on your job requisitions?	You can configure which fields display on a job requisition by configuring optional fields, security domains, and embedded analytics.

Questions	Considerations
	When using the Configure Optional Fields task for job requisitions and confidential job requisitions, you can set these fields as nonenterable for some or all security groups: • Additional Job Description • Job Description • Job Description Summary Example: You can enable recruiters to edit job descriptions while managers can only view them.
How do you want to configure questionnaires and assessments?	You can: • Configure the assessments and questionnaires that you want to make available for users to select. • Control which assessments and questionnaires Workday populates on job requisitions by creating condition rules.
How do you want to populate job requisition information?	You can configure Workday to populate job requisitions with information from existing positions. You can use information from the: • Position when you first created it. • Worker last hired into that filled position. You can also configure Workday to populate the job description and job description summary from the job profile instead of the position. When you create a new position as part of a job requisition, Workday populates the position details from the job requisition. You can configure Workday to populate scheduled weekly hours automatically from a working time rule if you: • Define a working time eligibility rule. • Enter information when creating a job requisition that matches the working time eligibility rule.
Who do you want to create your job requisitions?	For nonspecialist users, such as hiring managers, you can configure the simple, one-page Start Job Requisition task, or items in prompts.
How do you want to manage several job requisitions at the same time?	You can use mass actions to close, freeze, or unfreeze up to 10, 000 unfilled job requisitions at the same time. Example: Your organization has introduced a hiring freeze, and you need to freeze all of your job requisitions at once.
How do you want to highlight critical job requisitions?	You can use Spotlight Jobs to highlight important or hard-to-fill job requisitions.
How do you want to number your job requisitions?	You can define IDs to track your job requisitions. Example: R-2

Recommendations

- Keep your job profiles up to date so that Workday can use them to populate information on the job requisition.
- When configuring your security, only enable users to override hiring restrictions if you want them to be able to change details during the hiring process. Example: Location or Time Type.
- To improve your recruiting efficiency, use evergreen requisitions for your high-volume recruiting needs.
- Don't use padding when configuring your ID definitions for job requisitions as it can impact performance. When you need to use padding, use a setting of 10 zeros or more. Example: R-000000000001

Requirements

No impact.

Limitations

You can increase the number of positions on a job requisition after you've created it, but you can't decrease the number.

When you create a job requisition using an existing position, you can only select that position.

Tenant Setup

You can configure settings on the Edit Tenant Setup - HCM task to enable:

- Workday to populate organizations on job requisitions.
- Job requisitions for all staffing events in position management organizations or based on condition rules.
- Defaulting behavior for job requisition data in position management organizations.
- Workday to populate the Job Description and Job Description Summary fields from the job profile.
- Users to remove or replace a questionnaire on a job requisition, even after a candidate applies.
- You to create your ID definition for new job requisitions.

On the Edit Tenant Setup - Recruiting task, you can configure to enable candidates to reapply to job requisitions from the Candidate Home or internal career sites for nonworkers.

You can also access the Edit Tenant Setup - Assistant task to enable or disable the in-progress job requisitions feature for the Workday Assistant chatbot.

Security

Configure these security domains in the Recruiting functional area.

Domains	Considerations
Confidential Job Requisitions	Users can view and manage confidential job requisitions.
Job Requisitions for Recruiting	Users can access job requisition details that are specific to recruiting. Example: Job posting details.
Job Requisition Workspace	Users can access the Job Requisition Workspace.
Link Evergreen and Job Requisitions	Users can link an evergreen requisition to 1 or more job requisitions.

Domains	Considerations
Move Candidate to Linked Requisition	Users can move candidates between an evergreen requisition and linked job requisitions.

Configure these security domains in the Pre-Hire Process functional area:

Domains	Considerations
Job Requisition Data	Users can access job requisition data.
Pre-Hire Process: Mass Action on Job Requisitions	Users can carry out mass actions to close, freeze, or unfreeze job requisitions.

Business Processes

Business Processes	Considerations
Close Job Requisition	Enables you to close a job requisition. You can't: • Hire into a closed job requisition. • Reopen a closed job requisition.
Freeze Job Requisition	Enables you to freeze or unfreeze job requisitions. Example: You want to stop job requisitions during a hiring freeze.
Job Requisition	Enables you to review and approve steps for job requisitions.
Job Requisition Change	Enables you to edit job requisitions.

Reporting

Reports	Considerations
Job Requisition Aging	View how long job requisitions have been open to help with planning and recruiting. Workday calculates the data in this report using the difference between the current date and the recruiting start date.
Job Requisition Audit Report	View closed, filled, or frozen job requisitions that have active job postings or candidates. Users can take mass action on this report to: • Disposition candidates. • Unpost jobs.
My Open Job Requisitions	View a list of your open job requisitions.
View In-Progress Job Requisitions	View a list of Create Job Requisition events that are awaiting submission or approval.

Use these data sources in custom reports:

- All Job Requisitions
- Job Requisitions - Indexed
- Job Requisitions by Role

Integrations

Web Services	Considerations
Close Job Requisition *Create Job Requisition* *Edit Job Requisition*	Use this web service to manage your job requisitions.
Move Candidate to Linked Job Requisition	Use this web service to move a candidate from an evergreen requisition to a job requisition.
Manage Job Requisition Freeze	Use this web service to freeze or unfreeze open job requisitions.
Move Job Requisition	Use this web service to move a job requisition from 1 job management organization to another.

Connections and Touchpoints

Features	Considerations
Assessments	You can configure assessments to include in your job requisitions.
Compensation	You can include compensation details on your job requisitions.
Evergreen Requisitions	You can move candidates from evergreen requisitions to job requisitions when you're ready to hire them.
Job Application Templates	You can assign job application templates to job requisitions.
Job Postings	You can use open job requisitions to post jobs on career sites.
Headcount Plans	You can create condition rules to check for budget plans when you create job requisitions for existing positions.
Offer	You can use job requisitions to move candidates to the Offer stage.
Qualifications	You can add qualifications on job requisitions for position management organizations.
Questionnaires	You can configure questionnaires to attach to your job requisitions.
Staffing	You can add the *Create Job Requisition* business processes on these staffing business processes: • *Change Job* • *Termination*

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

Workday populates job postings using the data that you enter on a job requisition. You can use job posting templates to configure this data.

When you update a job requisition that affects role assignments, Workday automatically reassigns related in-progress My Tasks items to the enabled roles.

Steps: Set Up Job Requisitions for Recruiting

Context

Set up job requisitions for Recruiting so you can post jobs that candidates can apply to. Recruiters can also create job applications on behalf of candidates. You can view and compare candidates for each job requisition.

You can use candidate questionnaires at any stage of the recruiting process, and assign them to:

- Candidates.
- Any security group involved in the hiring process, such as interviewers or hiring managers.

Steps

1. Edit Domain Security Policies.

   Configure the *Job Requisitions for Recruiting* domain in the Recruiting functional area.
2. Set up questionnaires.

   You can include up to 4 questionnaires with a job requisition.

   See Steps: Set Up Questionnaires for Recruiting on page 455.
3. (Optional) Steps: Set Up Profiles and Profile Groups.

   Select the content you want to display on:

   - The Job Requisition Composite View profile.
   - Each of the profile groups for the Job Requisition Composite View profile.
4. (Optional) Access the Maintain External Recruiting Instructions task.

   If you select the Don’t Send to Recruiting System check box, Workday doesn't send the instruction to:

   - External recruiting companies.
   - Third-party recruiting vendors.

   Security: *Set Up: Pre-Hire Process* domain in the Pre-Hire Process functional area.
5. Hide or Require Optional Fields.

   You can hide or require fields on job requisition tasks, reports, and profiles. If you want to enable these features, select:

Feature	Functional Area	Field
View the number of candidates who are in these stages: • *Review*. • *Interview*. • *Employment Agreement*, *Offer*, or *Ready for Hire* (excluding declined offers).	Recruiting > View Job Requisition Detail	Candidate Stage Metrics

Feature	Functional Area	Field
View the Extend My Search button.	Recruiting > Job Requisition Overview for Composite View	Extend My Search

6. (Optional) Set up Spotlight Jobs.

   Use Spotlight Jobs to highlight critical job requisitions with a customizable label.

   See Steps: Set Up Spotlight Jobs on page 225.
7. (Optional) Enable suggested skills for job requisitions.

   You can enable machine learning to suggest skills when creating or editing a job requisition.

   See Steps: Set Up Machine Learning for Recruiting on page 201.

Next Steps

View all open, pending approval, frozen, and closed job requisitions using the Manage Job Requisitions report.

Post jobs to internal, external, or recruiting agency career sites.

Steps: Set Up and Create Confidential Job Requisitions

Context

You can create sensitive job requisitions that are only visible to a specific set of workers for confidential recruiting efforts. Example: Executive level positions.

Confidential job requisitions respect contextual security like regular job requisitions, with additional security for confidentiality. This confidentiality also applies to job applications for confidential job requisitions.

Steps

1. Set Up Assignable Roles.

   Create roles for groups of users who should have access to confidential job requisitions.
2. Edit Domain Security Policies.

   Access the security policy for the *Confidential Job Requisitions* domain in the Recruiting functional area.

   Specify the security groups that need to view and edit confidential job requisitions.
3. Edit Business Process Security Policies.

   For the *Job Requisition* business process, specify the security groups that can create a confidential job requisition for the *Create Confidential Job Requisitions* initiating action.
4. Activate Pending Security Policy Changes.
5. Edit Business Processes.

   Configure the *Job Requisition* business process definition in the Recruiting functional area. You can create a rule-based process definition to:

   - Determine if the requisition is confidential.
   - Route approval steps to a different role when the job requisition is confidential.

6. Access the Create Confidential Job Requisition task to create a confidential job requisition.

   You can't copy details from an existing job requisition or enter a position, even if you use position management.

   Workday generates a unique ID for the confidential job requisition when the *Create Job Requisition* business process starts. The ID displays in the job requisition name and all related communications, making it easier to differentiate between job requisitions with the same name.

   You can search for an in-progress Create Confidential Job Requisition task using the automatically generated job requisition ID when you:

   - Save the task.
   - Submit the task for approval.

Result

Candidates can apply to the confidential job requisition. Applicants for the confidential requisition are also confidential.

Next Steps

Send the job requisition to candidates by:

- Posting the job to the internal and external career sites you want to use for confidential candidates.
- Sending candidates a secret URL.
- Using the Create Job Application task to apply on their behalf.

Related Information
Tasks
Create and Edit Job Requisitions on page 611

Steps: Set Up Job Description Generation on Job Requisitions

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Security: *Manage: Machine Learning for Job Descriptions* domain in the Staffing functional area.

Grant the appropriate roles Modify access on these domains:

- *Job Profile: Generate Job Descriptions*
- *Manage: Machine Learning for Job Descriptions*

Context

Job Description Generation on Job Requisitions enables you to create job descriptions using artificial intelligence, reducing manual effort and ensuring that every job description includes all the details that you consider important. Example: Ensuring that every job description that you post includes your organization's commitment to Diversity and Inclusion.

Workday uses these data points to create job descriptions:

- Job Posting Title
- Company Name
- Skills

Steps

1. Access the Innovation Services and Data Selection Opt-In task.

   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.
2. On the Innovation Services Opt In tab, select HCM on the Available Services tab.
3. On the Maintain Innovation Services Data Selection Opt In tab, select HCM: HCM ML Features and Third Party Connectors GA.
4. Select the Opt In check box to enable these categories on the HCM: HCM ML Features and Third Party Connectors GA tab:

   - Job Posting Data
   - Job Requisition Data

   If you’re already opted in to Innovation Services and Data Selection Categories, you must select the Opt In to Additional Data check box, if available. You might need to wait 24 hours after you opt in for the Generate with AI button to display on your tasks.

Result

You can use the Generate with AI button on the Job Description field on these tasks, to create job descriptions:

- Create Job Requisition
- Edit Job Requisition
- Create Evergreen Requisition
- Edit Evergreen Requisition
- Create Confidential Requisition
- Edit Confidential Requisition

Job Description Generation on Job Requisitions isn’t currently supported on the Start Job Requisition task.

Related Information
Tasks
Setup Considerations: Job Requisitions for Recruiting on page 214
Workday Community: Job Description Generation on Job Requisitions AI Fact Sheet

Steps: Set Up Primary Recruiters

Context

You can manage recruiter workload by assigning primary recruiters to job requisitions. Instead of all recruiters receiving notifications associated with the job application process, they go to only 1 person.

Steps

1. Set Up Assignable Roles.

   Add a row with these values:

Field	Description
Role Name	Enter the name of a new recruiter role.
Workday Role	Select *Primary Recruiter*.
Enabled for	Select *Job Requisition*.
Hide on View if Not Assigned	Select the check box.
Role Assignees Restricted to	(Optional) Select the users or positions that you want to restrict the assignment of job requisitions.

   a) Enter the name of a new recruiter role.
   b) Select *Primary Recruiter* in the Workday Role column.
   c) Select *Job Requisition* in the Enabled for column.
   d) Select the Hide on View if Not Assigned check box.
   e) (Optional) Select the users or positions that you want to restrict the assignment of job requisitions to in the Role Assignees Restricted to column.
2. Create Role-Based Security Groups.

   Create a role-based security group called *Primary Recruiter*.
3. Edit Domain Security Policies.
   a) Configure the security policy for the *Staffing Actions: Job Requisition Role Assignment* domain in the Staffing functional area.
   b) Add *Primary Recruiter* to domains in the Recruiting functional area where *Recruiter* is already assigned.
4. Access the View Business Process Template report.
   a) From the related action menu of these business process types, select Business Process > Configure Consolidated Template:
      - *Job Requisition*
      - *Job Requisition Change*

   b) Add a row with *Assign Roles* as a business process type.

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
5. Edit Business Processes
   a) Add *Assign Roles* as an action step on these business processes:
      - *Job Requisition*
      - *Job Requisition Change*

6. Edit Business Process Security Policies.
    a) Add the *Primary Recruiter* role to the security policies for business processes where the *Recruiter* role is already assigned.

        Example:

        - *Assess Candidate*
        - *Job Requisition Change*
        - *Manage Internal Career Apply*
        - *Post Job*
        - *Refer a Candidate*
    b) Replace the *Recruiter* role with the *Primary Recruiter* role for the business process configurations where you want the *Primary Recruiter* role to take action.
7. Activate Pending Security Policy Changes.
8. Access the Edit Tenant Setup - Recruiting task.

    In the Recruiter Overload Count field, enter the number of job requisitions that you consider too many for a single recruiter or primary recruiter.

    See Reference: Edit Tenant Setup - Recruiting.
9. Create and Edit Job Requisitions

    Assign a primary recruiter to a job requisition.

Result

You can view the assigned primary recruiter on these reports and profiles:

- Candidate Pipeline
- Candidate Time Per Stage
- My Applications
- Internal Sourced Candidates
- Source Effectiveness
- Source to Pipeline
- Candidate profile
- Internal career site
- Job requisition profile

Workday assigns the last recruiter working on a job full credit for all job application stages on theCandidate Time Per Stagereport. Example: Initially, you assign Recruiter A to a job requisition. Later, you assign the same job requisition to Recruiter B. Recruiter B gets credit for all stages.

Next Steps

Use the Manage Recruiter Workload report to manage recruiters and their active assigned job requisitions.

Steps: Set Up Spotlight Jobs

Context

Workday enables you to highlight job or evergreen requisitions with a customizable Spotlight Job label, helping increase visibility for positions that are critical or difficult to fill.

Example: You can mark a *Senior AI/Machine Learning Engineer* role as a Spotlight Job because it is:

- Critical: Essential for a new AI-powered product launch.
- Hard-to-Fill: Requires specialized AI, Natural Language Processing, or computer vision skills that are in high demand but short supply.
- Urgent: Must be filled quickly to meet a tight deadline.

Steps

1. Hide or Require Optional Fields.

   You can use the Configure Optional Fields task to:

   - Hide the Spotlight Job field for all users.
   - Hide the Spotlight Job field for specific security groups that you define.
   - Remove the Spotlight Job row from the Configure Optional Fields by Task grid to display the field for all users.

   On the By Functional Area prompt, select:

Option	Description
Pre-Hire Process > Job Requisition	• Create Job Requisition task. • Find Jobs report. • Internal job postings.
Pre-Hire Process > Job Requisition Change	Edit Job Requisition task.
Pre-Hire Process > Job Requisition Details for Composite View	• Job requisition profile. • View Job Requisition report.
Recruiting > Evergreen Requisition	• Create Evergreen Requisition task. • Evergreen requisition profile. • Find Jobs report.
Recruiting > Evergreen Requisition Change	Edit Evergreen Requisition task.
Recruiting > Close Evergreen Requisition	Close Evergreen Requisition task.

2. (Optional) Create Custom Labels.

   Select *Recruiting* on the Term Context prompt to enter a custom label for spotlight jobs.
3. Add Spotlight Job as a facet on your internal career site.
   a) From the related actions menu of a custom report you have created, select Custom Report > Edit.
   b) On the Search Results grid, add a new row for the Spotlight Job - Text field.
   c) On the Advanced tab, on the Facet Options grid, add a new row for the Spotlight Job field.

Result

Spotlight Jobs display at the top of searches on external career sites, but don't display a custom label.

The My Referrals report displays an additional Spotlight Jobs column if at least 1 referral has a job application for a highlighted job requisition.

Concept: Find Jobs

Workday provides these reports for workers to browse job postings:

- Browse Jobs: Available to workers using the Workday browser application. Workers can access this task through Jobs Hub. Workday redirects workers who select the Find Jobsstandard report in global search to this report.
- Find Jobs: Available to workers using the Workday mobile app. You can copy this report to create custom jobs reports for your employees and contingent workers.

These reports enable you to search for and filter job postings. You can search by text or facets, such as Type, Hiring Manager, or Job Family.

With the Find Jobs report, you can use AND, OR, and NOT to build logical expressions in your text search. You can also save your searches to use later. Saved searches are for your personal use and cannot be accessed by other users.

You can create a custom report to add to your internal and external career sites by copying these standard reports:

- Find Jobs for internal career sites.
- Find Jobs Template for External Career Sites for external career sites.

Workday recommends that you make a copy of these standard reports and keep the Workday-delivered version unchanged.

On your custom report, select Facet Options on the Advanced tab to add, remove, or change the display order of facets.

If you edit a custom report that is configured on a career site and it can't execute, Workday reverts to the Workday-deliveredFind Jobs report.

When you click a result, Workday displays theView Job Posting Details page.

Configure the Time to Fill Report

Prerequisites

Security: *Set Up: Recruiting* domain in the Recruiting functional area.

Context

The Time to Fill report enables you to track the average length of time (in calendar days) it takes to fill an opening. The report displays the number of days it took to fill requisitions for each recruiter:

- Under 30 days
- 30 - 59 day
- 60 - 89 days
- 90+ days

You can define the start and end times used in the time-to-fill calculation:

[(End Time - Start Time) - days frozen] / # of positions tied to the job requisition.

You can set the start time as the:

- Completion date of the job requisition.
- Creation date of the job requisition.
- Earliest date for the job posting.
- Recruiting start date.

You can set the end time as the:

- Fill date of the job requisition.
- Completion date of the offer or employment agreement.
- Hire date.
- Latest initiation date of the hire.

Workday bases the standard Time to Fill report on a calculation defined by the *Average Time Calculation 1* report field.

Steps

1. Access the Edit Tenant Setup - Recruiting task.
2. Complete the Time to Fill section.

Related Information

Tasks

Create a Custom Time to Fill Report on page 228

Create a Custom Time to Fill Report

Prerequisites

Configure the *Time to Fill* report.

Context

You can create up to 4 versions of the Time to Fill Report based on the parameters you define for these time-to-fill calculations:

- *Average Time Calculation 1*
- *Average Time Calculation 2*
- *Average Time Calculation 3*
- *Average Time Calculation 4*

Steps

1. Access the Copy Standard Report to Custom Report task.
   a) Select *Time to Fill* from the Standard Report Name prompt.

      We recommend renaming the report.

      Example:*Time to Fill - Calculation 2*
2. In the Additional Info section, on the Matrix profile group and the Column Grouping (Optional) grid, right-click the *Date Range Bands* for*Time to Fill Report* option and selectSee in New Tab .
   a) From the related action menu of the *Date Range Bands* for *Time to Fill Report* calculated field, select Calculated Field for Report > Edit.
   b) In the Source Field prompt, select 1 of these options:
      - *Average Time Calculation 2*
      - *Average Time Calculation 3*
      - *Average Time Calculation 4*
   c) You can close the window for the Calculated Field - Lookup Range Band task.
3. In the Additional Information section, on the Drill Down tab and the Detail Data section, right-click the*Number of Position Available* option in the Field column and select See in New Tab .
   a) From the related actions menu of the*Number of Positions Available* calculated field, select Calculated Field for Report > Edit.
   b) In theArithmetic Expressiongrid, change the*Number of Positions Filled Calculation 1* selection in theFieldcolumn to 1 of these options:
      - *Number of Positions Filled Calculation 2*
      - *Number of Positions Filled Calculation 3*
      - *Number of Positions Filled Calculation 4*
   c) You can close the window for the Calculated Field - Arithmetic Calculation task.
4. In the Detail Data section, on the Drill Down tab change these values:

Option	Changes
Number of Positions Filled - Calculation 1	Number of Positions Filled - Calculation 2 Number of Positions Filled - Calculation 3

Option	Changes
	Number of Positions Filled - Calculation 4
Average Time Calculation 1	Average Time Calculation 2 Average Time Calculation 3 Average Time Calculation 4

5. In the Filter on Instances section on the Filter profile group, change *Number of Position Filled Calculation 1* in the Field column to 1 of these options:
    - *Number of Positions Filled Calculation 2*
    - *Number of Positions Filled Calculation 3*
    - *Number of Positions Filled Calculation 4*

Result

You have another version of the *Time to Fill* report based on the parameters you entered.

Related Information
Reference
Reference: Edit Tenant Setup - Recruiting

Reference: Auto-Reassign Job Requisition Events

When a requisition has a related event with an in-progress step and you modify role-enabled access, Workday automatically reassigns the step to the updated role-enabled users. Workday also automatically reassigns steps when you rescind an event.

Auto-reassign occurs when you modify these role-enabled instances:

- Business Unit
- Company
- Cost Center
- Custom Organization
- Fund
- Gift
- Grant
- Location
- Program
- Region
- Supervisory Organization

Auto-reassign doesn't occur when you use a web service to modify a requisition.

This table summarizes the events related to each requisition type that this feature supports:

Job Requisition Events	Confidential Job Requisition Events	Evergreen Requisition Events
• *Requisition Compensation* • *Create Job Requisition* • *Edit Job Requisition Additional Data* • *Edit Job Requisition* • *Freeze Job Requisition*	• *Edit Job Requisition Additional Data* • *Freeze Job Requisition* • *Job Application* and related subprocesses • *Job Posting*	• *Compensation* • *Edit Job Requisition Additional Data* • *Job Application* and related subprocesses • *Job Posting*

Job Requisition Events	Confidential Job Requisition Events	Evergreen Requisition Events
• *Job Application* and related subprocesses • *Job Posting* • *Recruiting Agency Candidate* • *Referral* • *Supplementary Questionnaires*	• *Supplementary Questionnaires*	• *Recruiting Agency Candidate* • *Referral* • *Supplementary Questionnaires*

This table summarizes the job requisition events Workday reassigns for different requisition types:

Event	Job Requisition	Confidential Job Requisition	Evergreen Requisition
Close Job Requisition	No	No	No
Compensation Event for Job Requisition	Yes	No	Yes
Create Evergreen Requisition *Create Job Requisition*	No	No	No
Edit Evergreen Requisition *Edit Job Requisition*	No	No	No
Edit Job Requisition Additional Data	Yes	Yes	Yes
Freeze Job Requisition	Yes	Yes	No
Job Application	Yes	Yes	Yes
Job Posting	Yes	Yes	Yes
Move Job Requisition	No	No	No
Recruiting Agency Candidate	Yes	Yes	Yes
Referral	Yes	No	Yes
Supplementary Questionnaires for Job Requisition (Post-completion steps only)	Yes	Yes	Yes

Related Information

Concepts

Setup Considerations: Job Requisitions for Recruiting on page 214
Setup Considerations: Evergreen Requisitions on page 232
Concept: Confidential Job Requisitions, Prospects, and Candidates on page 231

Concept: Confidential Job Requisitions, Prospects, and Candidates

Confidential Job Requisitions

You can make some sensitive job requisitions, such as those for executive-level replacements, accessible to only a specific set of users. Use the *Confidential Job Requisitions* domain in the Recruiting functional area to control who can view and work with these requisitions. Confidential job requisitions don't require a position until you initiate the decision to hire, even if you use position-based job tracking. When you initiate a hire for a confidential job requisition, the selected position doesn't have the additional confidential security.

Workday automatically makes job applications to confidential job requisitions confidential.

You can post confidential job requisitions, but they don't display in the standard Find Jobs reports on internal or external career sites. To send confidential requisitions to candidates, you can:

- Use the Create Job Application task to apply for the confidential job requisition on behalf of a candidate.
- Invite a prospect to apply by sending them a secret URL to the job posting. Instruct prospects not to share the URL with others, because access to the job posting doesn't require users to sign in.
- Post the job to agencies that allow confidential job postings, as configured on the Create Recruiting Agency task. Once posted, these agencies can submit confidential candidates if the agency users have permission to view the confidential postings.

You can't create a confidential job requisition by:

- Copying details from an existing job requisition.
- Using an existing position.
- Creating a new position.

Example: You can't move an existing candidate on a regular job requisition to a confidential job requisition.

Confidential Prospects and Candidates

Use the *View Confidential Prospects* and *Create Confidential Prospects* domains in the Recruiting functional area to control who can create and who can view confidential prospects.

When a confidential prospect applies for a confidential job requisition:

- Users with access to confidential prospects can view the prospects, even if they don't have access to the confidential job requisition.
- Users who only have access to the confidential job requisition can't view the confidential prospect.

Workday displays confidential prospects on:

- Only the Find Candidates report if they also apply for a nonconfidential job.
- The My Candidates report and other reports for users who have access to view them.

When a confidential prospect applies for a normal job requisition:

- The prospect's job application for the nonconfidential job requisition isn't visible to users who have access to only the confidential prospect.
- The prospect isn't visible to users who have access to only the job application and not the confidential prospect.
- Workday displays the candidates on the Find Candidates report.

Nonconfidential Prospects and Confidential Requisitions

When a nonconfidential prospect applies to a confidential job requisition, Workday displays them on the Find Candidates report. Users without access to confidential prospects can't see which job requisition the nonconfidential prospect applied for.

Troubleshooting: Job Requisitions

This topic provides strategies for diagnosing and resolving these job requisition problems:

- Users can't search for job requisitions in global search. on page 232
- Some job requisitions don't display on the Job Requisition Workspace. on page 232
- Job posting title updated on Edit Job Requisition task not reflected on internal Find Jobs report. on page 232

Users can't search for job requisitions in global search.

Cause: You didn't enable job requisitions for the staffing model of your supervisory organization.

Solution:

Steps

Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

1. Access the Edit Tenant Setup - HCM task.
2. In the Job Requisitions section, select 1 of these options:
    - Enable Job Requisitions for Job Management
    - Enable Job Requisitions for Position Management

Some job requisitions don't display on the Job Requisition Workspace.

Cause: When you have more than 1,000 job requisitions, Workday only displays 1000 requisitions on the Job Requisition Workspace.

Solution: Use filters on the Job Requisition Workspace report to narrow down your search results. Example: Primary Recruiter, Hiring Manager.

Cause: You didn't configure the correct security access for the Job Requisition Workspace.

Solution: Add the user to the *Job Requisition Workspace* domain.

Job posting title updated on Edit Job Requisition task not reflected on internal Find Jobs report.

Cause: The job posting template for the internal career site incorrectly uses the Job Posting Title report field that's secured to the Job Requisition Event business object. This enables Workday to return the job posting title from the original Create Job Requisition event.

Solution:

Steps

Security: *Set Up: Job Postings* domain in the Recruiting functional area.

1. Access the Edit Job Posting Template Content task.

    Select the template content for your internal career site.
2. Select *Job Posting Title* in the External Field prompt on the Section Content grid.

    Use the related actions to ensure that the Job Posting Title report field is on the Job Requisitions business object.

Evergreen Requisitions

Setup Considerations: Evergreen Requisitions

You can use this topic to help make decisions when planning your configuration and use of evergreen requisitions. 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

Evergreen requisitions remain constantly open. With evergreen requisitions, you can:

- Continually source and track candidates for high-turnover, high-volume, or hard-to-fill-positions.
- Move candidates through the *Job Application* business process.
- Move candidates to regular job requisitions when you want to hire them.

Business Benefits

With evergreen requisitions you can:

- Maintain a pool of skilled candidates for positions that are difficult to fill.
- Expedite the hiring process for seasonal or high-volume positions.
- Source candidates for positions when you don't have all the details yet. Example: Location.
- Have multiple job profiles, enabling you to select the most suitable job profile at the time of hire.

Use Cases

- You need to recruit for more than 100 farm workers in a short period of time.
- You want to continually source candidates for a position that is hard to fill.
- You want to recruit graduates well in advance of their start date, before you know which organization they'll belong to.
- You have a position with constant turnover.

Questions to Consider

Questions	Considerations
Do you want to generate offers?	You can configure offers on evergreen requisitions using condition rules. If you don't want to use condition rules, you can move candidates to a regular job requisition to send offers.
Do you want to generate employment agreements?	To generate employment agreements, move candidates to a regular job requisition.
Do you want to include compensation details?	Add compensation details to evergreen requisitions by adding *Request Requisition Compensation* as a step on these business processes: • *Evergreen Requisition* • *Evergreen Requisition Change*
What fields do you want to display on your evergreen requisitions?	You can define which fields you display by using: • The Configure Optional Fields task. • Security domains. When configuring options, you can set these fields as nonenterable for some or all security groups:

Questions	Considerations
	• Additional Job Description • Job Description • Job Description Summary Example: You can enable recruiters to edit job descriptions while managers can only view them.
Do you want applications to include candidates' personal information?	Specify the location when you create an evergreen requisition to ensure that applications contain personal information related to the location.
Do you want to enable your candidates to complete assessments during the application process?	You can: • Configure assessments using the Maintain Recruiting Assessment Tests task. • Create condition rules using the Maintain Job Requisition Assessment Defaults task to populate assessments into evergreen requisitions.
Do you want your candidates to complete questionnaires during the application process?	You can: • Add the *Complete Questionnaire* action step to any subprocess of the *Job Application* business process. Example: *Review Candidate*. • Create condition rules using the Maintain Job Requisition Questionnaire Defaults task to populate questionnaires into evergreen requisitions.

Recommendations

To enhance system performance and ensure efficient management of evergreen requisitions, Workday recommends that:

- Job profiles associated with each requisition don’t exceed a maximum of 2000.
- Linked requisitions shouldn’t exceed 200.
- You regularly disposition job applications.
- You refresh evergreen requisitions annually.

Features	Considerations
Assign Roles	If you don’t know the supervisory organization, Workday recommends that you configure the assigned roles when creating an evergreen requisition. This prevents steps without anyone assigned to them. Route steps on your *Job Application* business process to Primary Recruiter. If any steps in your *Job Application* business process route to organization-aligned roles, such as Recruiter or Manager, you can use condition rules to prevent unassigned tasks.

Features	Considerations
Load Candidates Using Web Services	To prevent performance issues, Workday recommends loading 3000 candidates or fewer for each evergreen requisition.
Linking Evergreen Requisitions and Job Requisitions	If you know your future hiring needs and recruiting details, make it easier to hire candidates by creating your evergreen and job requisitions at the same time.

Requirements

No impact.

Limitations

Move candidates to regular job requisitions to:

- Generate employment agreements.
- Hire candidates.

Tenant Setup

You can use the:

- Edit Tenant Setup - Recruiting task to enable candidates to reapply to the same evergreen requisition after they're moved to a linked job requisition and dispositioned.
- Edit Tenant Setup - HCM task to enable users to remove or replace questionnaires on evergreen requisitions.

Security

Users secured to the *Manage: Evergreen Requisitions* domain in the Recruiting functional area can view and carry out tasks and reports for evergreen requisitions.

You can also individually configure security for these subdomains:

- *Consolidated Candidate Pool*
- *Evergreen Reporting*
- *Link Evergreen and Job Requisitions*
- *Move Candidate from Evergreen to Evergreen*
- *Move Candidate from Job Requisition to Job Requisition*
- *Move Candidate to Linked Requisition*

Business Processes

When configuring the *Job Application* business process for evergreen requisitions:

- You can configure offers by removing the *Allow Offer if Job Application is not for Evergreen Requisition* condition rule from the *Offer* step on all stages of the *Job Application* business process.
- To avoid unassigned next steps for hiring managers, use condition rules on the *Job Application* business process to hide relevant steps when you don't know the supervisory organization.

Reporting

You can use the Job Requisition Audit Report report to view the status of your evergreen requisitions.

Access the Workday Standard Reports report and select the Recruiting category to view activity on your evergreen requisitions.

Integrations

You can use these web service operations to manage evergreen requisitions:

- *Create Evergreen Requisitions*
- *Close Evergreen Requisition*
- *Edit Evergreen Requisition*
- *Move Candidate to Linked Evergreen Requisition*
- *Move Candidate to Linked Job Requisition*

Connections and Touchpoints

Evergreen requisitions interact with these parts of Workday:

- Supervisory Organizations
- Nonsupervisory Organizations
- Job Profiles
- Questionnaires
- Assessments
- Qualifications
- Job Postings
- Compensation
- Job Applications
- Offer
- Candidates

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

Workday populates job postings using the data that you enter on an evergreen requisition. You can use job posting templates to configure this data.

When a user updates an evergreen requisition that affects role assignments, Workday automatically reassigns related in-progress My Tasks items to the enabled roles.

Related Information

Concepts

Concept: Translated Job Requisitions on page 618

Concept: Link Evergreen Requisitions to Job Requisitions on page 242

Tasks

Create and Edit Evergreen Requisitions on page 238

Create Job Posting Templates on page 416

Steps: Set Up Assessments for Candidates on page 463

Steps: Set Up Questionnaires for Recruiting on page 455

Steps: Set Up Evergreen Requisitions

Prerequisites

Create job requisitions.

Review setup considerations for evergreen requisitions.

Context

You can use evergreen requisitions to fill seasonal, high-volume, or hard-to-fill positions.

Evergreen requisitions and job requisitions follow the same recruiting workflow. While you can configure the *Offer* stage on evergreen requisitions using condition rules, you can't move candidates to the *Hire* stage. To proceed in the job application process, you must transfer candidates to a regular job requisition.

You can use candidate eligibility snapshots to create a list of candidates who were eligible for consideration on the evergreen requisition to help compliance and productivity reporting.

Steps

1. Edit Business Process Security Policies.

   Define and configure security policies for these business processes:

   - *Evergreen Requisition*
   - *Evergreen Requisition Change*
   - *Close Evergreen Requisition*
2. Edit Domain Security Policies.

   Set up the security policy for these domains in the Recruiting functional area:

   - *Evergreen Reporting*
   - *Link Evergreen and Job Requisitions*
   - *Manage: Evergreen Requisitions*
   - *Move Candidate from Evergreen to Evergreen*
   - *Move Candidate to Linked Requisition*
3. Hide or Require Optional Fields.

   Configure optional fields that display on evergreen requisitions.

   a) On the By Functional Area prompt, select *Recruiting*.
   b) Select an option:

      - *Evergreen Requisition*
      - *Evergreen Requisition Change*
      - *Close Evergreen Requisition*
4. (Optional) Configure offers on evergreen requisitions.

   Remove the *Allow Offer if Job Application is not for Evergreen Requisition* condition rule from the *Offer* step on all stages of the *Job Application* business process.
5. (Optional) Configure compensation on evergreen requisitions.

   To enable compensation on evergreen requisitions, add *Request Requisition Compensation* as a step on these business processes:

   - *Evergreen Requisition*
   - *Evergreen Requisition Change*
6. (Optional) Set up Spotlight Jobs.

   Use Spotlight Jobs to highlight critical evergreen requisitions with a customizable label.

   See Steps: Set Up Spotlight Jobs on page 225.
7. (Optional) Assign primary recruiters to job requisitions.

   The location and supervisory organization fields are optional for evergreen requisitions. However, if you leave these fields blank when you create an evergreen requisition, you have to enter a primary recruiter.

   See Steps: Set Up Primary Recruiters on page 224.

8. Access the Maintain Event Categories and Reasons task.

   Define reasons for completing these events:

   - *Close Job Requisition*
   - *Edit Job Requisition*

   Security: *Set Up: Staffing* domain in the Staffing functional area.
9. Link evergreen requisitions to job requisitions.

   When you're ready to make an offer or hire a candidate, you must move the candidate to a linked open job requisition.

   See:Concept: Link Evergreen Requisitions to Job Requisitions on page 242.

Next Steps

Post evergreen requisitions to external and internal career sites.

Move unhired candidates back to the evergreen requisition after you've made a hiring decision.

Related Information
Concepts
Concept: Candidate Eligibility Snapshots on page 241

Create and Edit Evergreen Requisitions

Prerequisites

Set up evergreen requisitions.

Context

Create evergreen requisitions so you can track seasonal or hard to fill job positions.

You can also create evergreen requisitions using the *Create Evergreen Requisition* web service.

Workday generates a unique ID for the evergreen requisition when starting the:

- *Create Evergreen Requisition* business process.
- *Create Evergreen Requisition* web service.

The ID displays in the evergreen requisition name and all related communications, making it easier to differentiate between job requisitions with the same name. You can search for an in-progress Create Evergreen Requisition task using the automatically generated job requisition ID when you:

- Save the task.
- Submit the task for approval.

Steps

1. Access the Create Evergreen Requisition or Edit Evergreen Requisition task.
2. In the Recruiting Information section, consider:

Option	Description
Spotlight Job	Highlights evergreen requisitions with a customizable label. To change the Spotlight Job label, access the Maintain Custom Labels task.
Recruiting Instruction	Instructions for third-party recruiting vendors. Define using the Maintain External Recruiting Instructions task.

Option	Description
Target Hire Date	Optional for evergreen requisitions.
Job Application Template	Displays only on the Edit Evergreen Requisition task. Security: *Staffing Actions: Job Requisition Job Application Template* domain in the Staffing functional area.
Use Updated Version Template	Displays only on the Edit Evergreen Requisition task when the selected job application template has changed.

3. In the Job section, consider:

Option	Description
Job Profile	Defines the default values for other job requisition fields. You can only select 1.
Additional Job Profiles	Determines if you can link an evergreen requisition to a job requisition. You can select more than 1.
Job Description Additional Job Description	Enter additional information about the job. You can configure these fields to display on your internal or external career site using job posting templates.
Primary Location	Location for the evergreen requisition. Enter a U.S. location and create location-based questions in the Apply - Personal Information section of the Edit External Career Site task to collect specific information when a candidate applies to a job posting. Example: Ethnicity, gender, veteran status, and voluntary self-identification of disability information.
Primary Job Posting Location	Post jobs to a location that is different from the primary location. Workday also uses this location to identify the location-related facets on the Find Jobs report. Automatically populates from the Default Job Posting Location field on the Create Location task. If no default job posting location exists, automatically populates from the Primary Location field. If you edit a job requisition, Workday won't automatically populate the Primary Job Posting Location and Additional Job Posting Locations fields with data from the Primary Location and Additional Location fields. You can only select a location that has *Business Site* or *Job Posting* as the Location Usage.
Scheduled Weekly Hours	Populates from a rule when: • You define a working time rule.

Option	Description
	• The data populated on the Maintain Working Time for country task applies the rule. Weekly hours default from the scheduled weekly hours on: • The job requisition that you are copying. • The worker who is in a position, or previously filled a position if you create a job requisition on a position management organization. • The restriction on the existing unfilled position, if you create a job requisition on a Position Management Organization. • The time profile on the primary location set when you create the job requisition.
Questionnaire	For Recruiting only. Workday populates questionnaires using condition rules that you can create. Only Recruiting type questionnaires are available. Candidates complete these questionnaires when they apply to jobs on internal and external career sites. To remove or replace questionnaires, select the Enable Primary and Secondary Questionnaire Removal or Replacement on Evergreen and Job Requisitions check box on the Edit Tenant Setup - HCM task.

4. In the Link To Job Requisitions section, select 1 or more open job requisitions with which to associate the evergreen requisition from the Job Requisitions prompt.

   You can associate an evergreen requisition with more than 1 job requisition, but you can only associate a job requisition with 1 evergreen requisition. The evergreen requisition and job requisition must have at least 1 common job profile.
5. (Optional) In the Questionnaire section, associate questionnaires with the evergreen requisition.

   When a candidate applies to a job, they must complete these questionnaires (not available on mobile).

   If you have questionnaires associated with the job profile, Workday automatically populates these fields:

   - Internal Career Site - Primary
   - Internal Career Site - Secondary
   - External Career Site - Primary
   - External Career Site - Secondary

   You can manually change or remove the associated questionnaires.
6. (Optional) In the Assign Roles section, assign the roles for the evergreen requisition.

   Required if the Supervisory Organization and Location fields are blank.

   You can only change the Supervisory Organization using the Edit Evergreen Requisitiontask.

Result

When you create an evergreen requisition, Workday uses the Maintain Job Application Templates task to evaluate which template to assign to the requisition. If you add Review Job Application Template as a step to the *Evergreen Requisition* business process, Workday sends the Review Job Application Template task to the assigned security group's My Tasks. This task enables you to change the assigned template.

Related Information

Concepts

Concept: Translated Job Requisitions on page 618

Tasks

Steps: Set Up Job Applications on page 445

Concept: Candidate Eligibility Snapshots

When making a hiring decision for a job requisition that's linked to an evergreen requisition, you can create a list of candidates who were eligible for consideration. Workday displays this candidate eligibility snapshot as part of the candidate pool on the job requisition.

Candidates considered eligible for consideration are those that:

- Applied directly to the job requisition.
- Applied to an evergreen requisition before the date of the snapshot.
- Moved from an evergreen requisition to the linked job requisition. Of these candidates, those not considered eligible for consideration:
    - Were rejected before the recruiting start date on the job requisition.
    - Withdrew from the linked evergreen requisition before the date of the snapshot.

  You can create as many snapshots as you need.

Concept: Moving Candidates Between Evergreen and Job Requisitions

You can move candidates between evergreen and job requisitions using the More menu on the Candidates tab of the requisitions. Examples:

- Maria applied for a position on an evergreen requisition, if you now want to move their job application to the *Offer* stage, you have to move them to a job requisition.
- Fritz applied for a position on a job requisition but didn't get hired but you wish to consider their application in the future. You can move Fritz from a job requisition to an evergreen requisition.

You can't move candidates between requisitions if:

- The requisition is closed or frozen.
- The candidate is rejected or the candidate declines an offer.

You can move candidates from:

Action	Consideration
An evergreen requisition to a job requisition.	You need to move candidates to a regular job requisition when you're ready to move them to the *Offer* or *Ready to Hire* stages, unless you have offers configured on evergreen requisitions.
A job requisition to an evergreen requisition.	Change the candidate's stage to anything other than *Ready for Hire*. You can only move candidates back to their original evergreen requisition.

Action	Consideration
An evergreen requisition to another evergreen requisition.	You can move candidates from one evergreen requisition to another when both requisitions have a matching job profile.
Move candidates from a job requisition to another job requisition.	You can move candidates between job requisitions that have a common evergreen requisition.

Workday:

- Moves the candidate and all related data history from 1 requisition to the other. The candidate's job application is no longer connected to the original evergreen or job requisition.
- Sends a My Tasks item to the role assigned to the appropriate stage in the recruiting process.
- Records the action on the Activity Stream tab on the candidate’s job application.
- Assigns all pending events to the person responsible for the requisition.

Related Information

Tasks

Take Action on Multiple Candidates on page 274

Steps: Set Up Evergreen Requisitions on page 236

Concept: Link Evergreen Requisitions to Job Requisitions

You can link an Evergreen Requisition to a Job Requisition to move candidates between the two during the job application process.

Example: Your organization keeps an open Evergreen Requisition to source seasonal workers. This requisition is linked to a job requisition for the upcoming summer season. When you’re ready to hire, move successful candidates from the Evergreen Requisition to the summer job requisition. After filling the summer positions, you can close the summer job requisition and continue using the Evergreen Requisition for winter holiday workers.

You can use the Link to Job Requisition field on the Create Evergreen Requisition task to link an Evergreen Requisition to an existing Job Requisition. You can also link an evergreen requisition to a job requisition using these tasks:

- Create Evergreen Requisition
- Edit Evergreen Requisition
- Create Job Requisition
- Edit Job Requisition

The Link to Job Requisition prompt will return all requisitions that are valid to for linking, and which you have access to.

Security: *Link Evergreen and Job Requisitions* domain in the Recruiting functional area.

You can link an evergreen requisition to an Open or Frozen job requisition if:

1. They share a common job profile across either the primary or additional job profiles.
2. The evergreen requisition is open, and has no In-Progress close events.

You can only link a job requisition to 1 evergreen requisition.

You can't link an evergreen requisition to a job requisition that is:

- Closed or Filled.
- Confidential.
- Linked to another evergreen requisition.

You can update the link to the job requisition using the Edit Evergreen Requisition task.

You can't unlink an evergreen requisition from a job requisition after you have moved candidates between them.

You can unlink an evergreen requisition from a job requisition if candidates made their job applications directly on either requisitions.

Offers on Evergreen Requisition

A condition rule on the *Job Application* business process prevents movement of candidates on evergreen requisitions to the *Offer* stage. To move candidates on evergreen requisitions to the *Offer* stage, you must remove the condition rule *Allow Offer if Job Application is not for Evergreen Requisition* from all stages of the *Job Application* business process where you want to advance candidates to the *Offer* stage.

Best Practices for Linked Evergreen Requisitions

To ensure effective management of evergreen requisitions, Workday recommends the following:

- Limit job profiles per requisition to 2,000.
- Limit linked requisitions per evergreen requisition to 200.
- Regularly disposition job applications.
- Refresh evergreen requisitions annually.

Candidates

Set Up Prospects and Candidates

Steps: Set Up Candidate Security

Context

Set up candidate security so you can determine who can view candidate information and perform candidate-related actions. You can also enable self-service access for candidates by configuring the *Candidate as Self* security group.

You can also enable domain access for these security groups to provide them with candidate information:

- *Active Interviewer*
- *Interviewer*
- *Candidate Share*

Note: You can't view the members of these security groups. You can only test to determine if a given user is a member of these groups. Additionally, you can't remove users from these security groups.

Workday automatically assigns interviewers of a job application to the *Active Interviewer* security group. *Active Interviewer* members have access to the candidate that they're interviewing for as long as the Interview event is in progress. If you want interviewers to always have access to the information of their candidate, you can configure domain access for the *Interviewer* security group instead.

When a recruiter shares a candidate, Workday automatically assigns the recruiter that receives the shared candidate to the *Candidate Share* security group.

Steps

1. Edit Domain Security Policies.

   Configure the security policy for these domains in the Recruiting functional area:

Domain	Controls Access To
Candidate: Global Search	Candidate information accessed in global search.
Candidate Communication	All communications sent to a candidate.
Candidate Data: Edit Job Application	Edit job application information for candidates.
Candidate Data: Employee Referrals	Referral management-related tasks and reports.
Candidate Merge	View and merge duplicate candidates.
Invite to Apply	Invite candidates to apply to job requisitions.
Manage: Candidates	Candidate status tasks.

   Configure these super domains, or their subdomains, in the Recruiting functional area:

Domain	Controls Access To
Candidate Data: Job Application	Candidate job application with details such as assessment results, language skills, and interview feedback.
Candidate Data: Other Information	Additional candidate data such as attachments on the Candidate Profile through the *Candidate Data: Attachment* subdomain.
Candidate Data: Personal Information	Personal information that candidates can submit either with their applications or during the *Job Application* business process. The information is often highly sensitive. Includes access to the Personal Information tab on the Candidate profile page.
Candidate Reporting	Recruiting standard reports data.
Move Candidate	View and move candidates.
Prospects	Prospect tasks, reports, and profiles.
Self-Service: Recruiting Personal	Personal notes for candidates as well as contacts, prospects, and candidates linked to a job requisition.

   If a candidate has a worker record, configure the security policies for these super domains in the Staffing functional area:

Domain	Controls Access To
Person Data: Home Contact Information	Contact information of the candidate, including contact information marked as private.
Person Data: Work Contact Information	Work contact information of the candidate.

2. Maintain Security Group Permissions.

   Configure permissions for these security groups:

   - *Candidate as Self*
   - (Optional) *Active Interviewer*
   - (Optional) *Interviewer*
   - (Optional) *Candidate Share*
3. Configure access to questionnaire response context security segments.

   See Concept: Segmented Security for Recruiting Questionnaires on page 459.
4. Activate Pending Security Policy Changes.

Next Steps

Set up job applications and configure internal and external career sites so candidates can apply for jobs.

Steps: Set Up Candidate Pool Security

Context

You can set up role-based security groups to manage public, private, and restricted candidate pools.

Steps

1. Set Up Assignable Roles.

   Create a role enabled for candidate pools with *Candidate Pool Manager* as the Default Role.
2. Create Role-Based Security Groups.

   Select:

   - *Role-Based Security Group (Unconstrained)* on the Type of Tenanted Security Group prompt.
   - A role you created on the Assignable Role prompt.
3. Edit Domain Security Policies.

   Assign the security groups you created to 1 or more of these domains in the Recruiting functional area:

   - *Candidate Pool: Manage Membership*
   - *Candidate Pool: My Private Pools*
   - *Candidate Pool: Private Pool Create*
   - *Candidate Pool: Private Pool View and Modify*
   - *Candidate Pool: Restricted View*
   - *Candidate Pool: View and Modify Pool*
4. Activate Pending Security Policy Changes.

Related Information

Tasks

Steps: Manage Candidate Pools on page 261

Steps: Set Up Prospects and Candidates

Context

There are 2 types of candidates in Workday:

- Active candidates, who have at least 1 job application.
- Prospects, who are contacts you want to track but don't match any specific job postings.

Set up candidates so you can:

- Create and track prospects.
- Share prospects and candidates with other recruiters.
- Invite candidates to apply for jobs.
- Create job applications on behalf of candidates.

Steps

1. Configure candidate security.

   See Steps: Set Up Candidate Security on page 243.
2. Access the Maintain Prospect Statuses task.

   Create statuses to track prospects. Examples: *New*, *Nurturing*, *Ready*.

   You can define an external-facing status label for prospects in the Prospect Label Override column. This status displays on the My Referrals report until the candidate applies for a job.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
3. Access the Maintain Prospect Types task.

   Separate prospects into categories for easier searching. Example: *Contact*, *Networker*, *Key Influencer*.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
4. Create your library of schools, degrees, and field of studies.

   See Steps: Set Up Education on page 137.
5. Create your library of companies.

   See Steps: Set Up Job History Companies on page 137.
6. Create your library of languages.

   See Steps: Set Up Languages on page 139.
7. Create your library of skills.

   See Steps: Maintain Skills on page 1828.
8. Steps: Set Up Profiles and Profile Groups.

   Configure the candidate and prospect profiles.
9. (Optional) Create Custom Reference IDs for Candidates on page 254.

   Change the naming convention for the candidate reference ID that Workday generates.
10. Maintain Recruiting Sources on page 272.
11. Set up notifications for internal and external candidates.

    See Steps: Set Up Notifications for Candidates on page 323.
12. Hide or Require Optional Fields.

    For the Recruiting functional area, configure optional fields for the Create Prospect task.
13. (Optional) Access the Edit Tenant Setup - Recruiting task.

    a) Select the Enable Automatic Candidate Merging check box to have Workday merge duplicate candidates that:

       - Apply to a job posting on an external career site.
       - You upload with the *Put Candidate* web service.

    b) Select the Enable Candidate School Look Up for External Career Sites check box.

       This check box enables external candidates to search for and select schools from your tenant when completing job applications. External candidates won't be able to add their school if it doesn't exist in your tenant.

    c) Select the Copy Personal Information from Job Application on Initiate Hire check box.

       When you enable this setting and hire a candidate that was merged to a contingent worker, Workday populates some information on the worker profile from their job application.

    See Reference: Edit Tenant Setup - Recruiting.

Next Steps

Use these reports to view candidate information:

Report	Candidate Information
Find Candidates	All candidates that you have access to.
My Candidates	• Candidates who applied to your job requisitions. • Prospects that you added to your prospect list.
My Recruiting Jobs	Number of active candidates for your job requisitions.

Related Information
Tasks
Steps: Set Up Recruiting on page 191

Steps: Set Up Prospect and Candidate Profiles

Prerequisites

Security: *Set Up: System* domain in the System functional area.

Context

Workday delivers a prospect and candidate profile that enables you to view detailed information about your candidates and prospects. Workday automatically configures these profiles for you. However, you can change the Summary profile group.

Steps

1. Access the Configure Profile Group task.

   Define the profile groups that display on the candidate and prospect profile. The Summary profile group isn't available for configuration using this task.
   a) Select either prospect or candidate profile, then the specific group you want to configure.
   b) Add, remove, or reorder the reports that Workday delivers for the profile group.
2. Access the Configure Profile Summary task.

   Define the information that displays on the Summary profile group.
   a) Select either candidate and prospect profile.
   b) Add, remove, or reorder the cards that Workday delivers for the Summary profile group.
3. Access the Configure Profile Header Card task.

   Define the information that displays on the top card on Summary profile group. If you don't select any items, the card doesn't display.
   a) Select either candidate or prospect profile.
   b) Add, remove, or reorder the items that Workday delivers for the header card on the Summary profile group.

Steps: Set Up Masked Candidate Profiles

Context

You can configure a Masked Candidate Profile to hide certain cards on the profile, which helps eliminate any biased candidate screening.

Steps

1. Access the Configure Profile Summary task.

   Add the summary cards you want to display on the Masked Candidate Profile.

   Workday automatically adds these cards on the Masked Candidate Profile:

   - Job Application Details
   - Active Masked Job Applications

   See: Steps: Set Up Profile Cards
2. Access the Configure Profile task.

   Select the profile groups you want to display on the Masked Candidate Profile.

   See Steps: Set Up Profiles and Profile Groups.
3. Access the Maintain Masked Recruiting Configurations task.

   Create a masked configuration and add the unconstrained security groups you want to mask for any of these recruiting stages:

   - Assessment
   - Review
   - Screen

   Security: The *Set Up: Recruiting* domain in these functional areas:

   - Recruiting
   - Talent Pipeline
4. Create Business Process Condition Rules.

   Select Job Requisition on the Business Process Type prompt.
5. Access the Maintain Masked Job Requisitions Defaults task.

   Assign job application condition rules to your masked configurations.

   Click Default All Job Applications button to apply condition rules and masked configurations to all pre-existing active and frozen job requisitions.

Result

Workday doesn't support these recruiting functionalities if you have a masked configuration on a job application:

- Candidate pools.
- Duplicates.
- Parallel stages.

On masked candidate profiles, you won't have access to the:

- Candidate email and resume attachments, but you can still email a candidate using the Send Message task.
- Business process event history while viewing a masked job application.

Workday doesn't apply the masked configuration on candidate-based reports if at least 1 of a candidate's multiple applications is in an unmasked stage. Workday recommends you use job application-based reports instead, to avoid exposing candidate information. Example: Use the My Candidates in Progress report in place of the My Candidates report.

Next Steps

Configure your candidate list assignment in accordance with your masked configuration. Example: Remove Education from candidate list if you mask school information.

Related Information

Reference

2020R2 What's New Post: Masked Candidate Screening

Steps: Set Up Candidate Mass Actions on Recruiting Hub

Prerequisites

Set up the Recruiting Hub.

If you've hidden the Candidates navigation button on the Recruiter Hub, reconfigure it using the Maintain Navigation Menu Overrides task.

Context

You can configure the Candidate Job Applications grid to enable recruiters to take action on multiple candidates at once.

Steps

1. Steps: Maintain Custom Candidate List Grids on page 263.

   Use the Edit Grid Configuration task to select the Default Candidate Job Applications Grid.
2. Hide or Require Optional Fields.

   Select Candidate Job Applications as the functional area.

   Configure fields for the Candidate Job Applications prefilter page that Workday displays if you've more than 5,000 candidates. The Applied After field always displays and can't be configured.

   If a user creates a saved filter, the prefilter is automatically configured as Hidden.
3. Access the Maintain Candidate List Assignment task.

   Select the Candidate Job Applications Grid as the Default Grid to display on the Job Requisition composite view.

Result

Recruiters can now save column filters you've selected on the Candidate Job Applications grid and quickly reapply filters in the future.

Related Information

Reference

2020R1 What's New Post: Mass Actions Across Job Requisitions

The Next Level: Enabling the Candidate List and Mass Actions

Steps: Create Confidential Prospects

Context

You can secure confidential prospects to the *View Confidential Prospects* and *Create Confidential Prospects* domains to control who can view and who can create them.

Steps

1. Set Up Assignable Roles.

   Create roles for the users who can view and create confidential prospects. Select the Self-Assign check box for the role and enable it for prospects.

2. Create Role-Based Security Groups

   Create role-based security groups to:

   - Enable all users in the *View Confidential Prospects* domain to access the prospect.
   - Limit access to the user who created the prospect.
3. Edit Domain Security Policies

   Configure the security policy for these domains:

   - *Create Confidential Prospects*
   - *View Confidential Prospects*
4. Access the Create Confidential Prospect task.

   Workday secures the prospects you create to the *View Confidential Prospects* domain.

Next Steps

Invite the prospect to apply for a confidential job requisition or create a job application on their behalf.

Related Information

Concepts

Concept: Confidential Job Requisitions, Prospects, and Candidates on page 231

Tasks

Set Up Assignable Roles

Steps: Set Up Prospect Consent Collection

Context

To comply with General Data Protection Regulation (GDPR) and other regulations, you can configure emails that Workday automatically sends to prospects to request consent for storing their data. The emails direct prospects to a page on your external career site where they can read and accept or decline your terms and conditions.

You can use Notification Designer to design emails with more advanced branding and layout options than a standard email template.

Steps

1. Create Email Templates.

   Select *Prospect Consent Collection* from the Email Template Behavior prompt.
2. (Optional) Create a Notification Template.

   If you use Notification Designer, you can create and activate a template for the *Prospect Consent Collection* notification type instead of creating an email template.

   See Create and Activate Notification Templates.
3. Create a message template for the *Prospect Consent Collection* notification type.

   Click Insert Tag on the text editor to add the External Site ~Prospect~ Consent Link report field into the body of the email. This report field generates an *Accept and Decline Terms and Conditions* link that prospects can click to access the correct page on your external career site. You can't override the link text.

   See Steps: Set Up Message Templates.
4. Configure Prospect Consent Terms and Conditions on page 255.

5. (Optional) Hide or Require Optional Fields.

   Workday recommends that you make the Email field required on these tasks so prospects can receive emails:

   - Create Prospect
   - Create a Referral
   - Refer a Candidate
6. (Optional) Display responses from prospects on the Prospect Profile profile.

   You can add *Consent Status* as an item on the profile header card.

   See Steps: Set Up Prospect and Candidate Profiles on page 247.
7. Edit Domain Security Policies.

   Grant users who need to report on consent statuses and manually send emails access to the *Manage: Prospect Consent* domain.

Result

Workday automatically:

- Sends emails to prospects when you create them through the user interface.
- Records emails and consent status updates as timeline events on the Recruiting History report on the Prospect Profile profile.

Next Steps

Access the View Prospect Consent Status report to:

- Review responses from prospects.
- Manually send reminder emails to prospects who haven't responded or manually send emails to prospects who haven't received one. Examples: prospects created before feature setup or created by web services.

You can use the Purge Person Data report to purge data for prospects who decline consent.

Related Information
Concepts

Concept: Notification Designer

Tasks

Steps: Purge Person Privacy Data

Steps: Set Up Constrained Prospect Security by Country

Prerequisites

To set up constrained prospect security, you must have access to these security domains:

- *Set Up: Assignable Roles*
- *Security Configuration*
- *Set Up: Recruiting*
- *Set Up: Security Administration*

Context

You can set up enhanced prospect security based on a prospect's country, allowing recruiters to view only the prospect data that's relevant to their assigned regions. This feature enables you to customize regions to align with your organization’s structure and helps your organization comply with General Data Protection Regulation (GDPR) requirements by restricting recruiter access by country.

To configure this functionality, you must first create recruiting regions that contain 1or more countries, and then assign roles to those regions. You can assign roles directly on the region or by using the role assignments on location hierarchies you add to the region.

Constrained prospect security by region applies only to prospects and candidates who have prospect records. This security won't apply if a job application exists without a corresponding prospect record.

These steps enable you to configure security for recruiting regions. If you plan to assign roles directly on the Region of Recruiting, follow steps 1-3. You can skip steps 1-3 if you only plan to use role assignments with location hierarchies added to the region for recruiting.

Steps

1. Run the Maintain Assignable Roles task to create a new role.
    a) Add Region for Recruiting in the Enabled For column.
2. Run the Create Security Group task.
    a) Select Role-Based Security Group (Constrained).
    b) Add a name.
    c) Select the role created in the previous step.
3. Edit the domain security policies for security domains that apply from the attached list.

    If you need constrained access for specific domains, remove the unconstrained groups and add the constrained groups. (Example: The group you created in step 2).
    a) *Prospects*
    b) *Prospect Sharing*
    c) *All Prospects*
    d) *Candidate: Global Search*
    e) *View Confidential Prospects*
    f) *Candidate Data: Personal Information and subdomains*
    g) *Manage: Prospect Consent*
    h) *Candidate Data: SMS Opt-In/Opt-Out*
    i) *Manage: Candidates*
    j) *Candidate Data: Other Information and subdomains*
4. Run the Create Region for Recruiting tasks.
    a) Enter the Name and Description.
    b) Select the Default Region checkbox to create a region that covers countries not specified in other regions.
    c) Select the Inactive checkbox to make the region inactive.
    d) Select 1 or more countries from the prompt.
    e) (Optional) Assign 1 or more roles.
    f) (Optional) Select 1 or more location hierarchies to use the role assignments on those location hierarchies.
    g) Ensure roles are assigned either directly or through location hierarchies.
5. Repeat step 4 for any additional regions as per your requirements.
6. (Optional) Run the Regions for Recruiting report to view all the regions that have been set up.
7. Copy the Find Candidates report to and select the new data source filter Internal and External Candidates Secured by Prospect for the new report.
8. Hide the existing Find Candidates report.

Result

Workday applies the new security constraints to prospect data. After you create or edit regions, assign roles, or add or remove location hierarchies, you must allow 1 to 2 hours for the changes to propagate before the new security takes effect.

Example

As a recruiter assigned to a certain region, login and search for candidates for that region. You can find candidates from your region using either search or the Find Candidates report that you created earlier. As expected, you won't be able to find or view candidates from other regions.

Related Information

Concepts

Concept: Guidelines for Constrained Prospect Security by Country on page 257

Tasks

Steps: Set Up Candidate Security on page 243

Reference

2025R2 Feature Release Note: Constrained Prospect Security by Country

Create Prospects

Prerequisites

- Set up candidates.
- Security: *Prospects* domain in the Recruiting functional area.

Context

Creating prospects in Workday enables you to track individuals who don't match a specific job posting. You can add prospects from outside or inside your company.

Steps

1. Access the Create Prospect task.
2. (Optional) In the New Prospect Details section, enter the prospect's details.

   Workday checks these details and displays the Duplicate Information Page if there are any potential duplicates for you to review. If you find an exact match, you can continue working with the existing record instead of creating a new prospect.
3. As you complete the Create Prospect task, consider:

Option	Description
Phone Device Type	You can restrict the phone device types available for prospects using the Hide for Recruiting check box on the Maintain Phone Device Types task.
Source	Workday automatically populates the field with *Internal* for existing workers. Complete the Referred By field when you select a Source mapped to 1 of these sources: • Employee Referral • Proxy Referral • Self-Identified

Option	Description
LinkedIn URL	Recruiters with Linkedin™ accounts can view LinkedIn Shared Connections on the prospect's profile in Workday. This field only displays when you create a new prospect.
Recognized Skills	Recognized skills automatically populate from the worker profile for internal prospects. You can also select 1 or more skills configured on the Maintain Skills task.
Additional Skills	Displays only when you create a prospect from an existing worker who has at least 1 skill that isn't configured on the Maintain Skills task on their profile.

Result

You can only see these values on an external prospect's profile if you have access on the *Prospects* domain:

- Home Address
- Email
- Phone Number

For internal prospects, Workday:

- Doesn't populate candidate pool and succession pool membership.
- Automatically populates theEmail, and Phone from the worker profile. You can't change these values, and can only see them on the Edit Prospect task if you have access to these domains:
    - *Person Data: Home Email*
    - *Person Data: Home Phone*

Next Steps

Add the new prospect to:

- Candidate pools.
- Succession pools.

Create a job application for the new prospect.

Related Information

Tasks

Steps: Set Up Prospects and Candidates on page 245

Reference

2021R1 What's New Post: Phone Device Type Field for Recruiting

Create Custom Reference IDs for Candidates

Context

Third-party vendors might require a specific format for reference IDs in integrations. You can change the naming convention for the candidate reference ID that Workday generates.

Steps

1. Access the Create ID Definition / Sequence Generator task.

   Create the naming convention for the candidate ID definition.

   Security: *Set Up: Contact Info, IDs, and Personal Data* domain in the Contact Information functional area.
2. Access the Edit Tenant Setup - HCM task.

   In the ID Sequence Generators section, select the ID definition you created from the ID Definition for Candidate prompt.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

Result

To view the reference ID for a prospect or active candidate, select Integration IDs > View IDs from the related actions menu of the prospect or candidate.

Configure Prospect Consent Terms and Conditions

Prerequisites

- Create a message template for the *Prospect Consent Collection* notification type.
- Security: *Set Up: Recruiting* domain in the Recruiting functional area.

Context

You can enable prospect consent collection and configure a page with these details on your external career site:

- Instructions for prospects.
- Default terms and conditions.
- Terms and conditions to display to prospects located in specific countries.
- Consent responses.

Steps

Access the Maintain Prospect Consent task.

As you complete the task, consider:

Option	Description
Email Template	Email templates specify the structure and layout of emails. You can use the Create Email Template task to create a template using the *Prospect Consent Collection* email template behavior, or select the default email template to use for prospect consent emails. See Create Email Templates. If you use Notification Designer, this field displays as Notification Template instead of Email Template. You can only select templates that you've made active for the *Prospect Consent Collection* notification type using the Maintain Notification Templates task. See Create and Activate Notification Templates.

Option	Description
Message Template	Message templates specify the text within the body and subject line of emails. You can select templates created with the Create Message Template task.
Consent Page	Select the external career site for your prospect consent collection page. You can only select a published career site. You can't unpublish the external career site configured for prospect consent. To unpublish the career site, you must remove it from the Career Site prompt.
Terms and Conditions	Enter text for the terms and conditions that you want to display to prospects. You can use the grid to: • Configure terms and conditions by country. • Disable consent collection in specific countries.

Next Steps

Use the Translate Business Object report to translate instances on the Prospect Consent Collection business object.

Related Information
Reference
2024R2 Release Note: External Career Site Prospect Consent Collection

Concept: Resume Parsing

Resume parsing enables recruiters to create a prospect or job application when attaching a resume in Workday. You can use resume parsing on the View Prospect report and these tasks:

- Create Confidential Prospect
- Create Job Application
- Create Prospect
- Edit Prospect
- View Prospect

You can also use resume parsing on the Attachments tab of the prospect profile.

Resume parsing populates fields from a resume, and Workday enables you to review the resume data. Workday doesn't auto-fill fields you configure as hidden or these fields:

- Languages
- Skills

Resume parsing results can vary based on resume format and order of words. For best results, use resumes that don't have images or image-based styles.

You can configure job application templates to hide resume parsing for external candidates. This enables applicants to apply to jobs that don't require resumes more quickly, without disabling resume parsing for:

- Recruiters
- Prospects who submit resumes though the Prospect Introduce Yourself page.

Related Information

Tasks

Steps: Set Up Job History Companies on page 137

Steps: Set Up Notifications for Candidate Home Tasks on page 376

Steps: Set Up Job Applications on page 445

Reference

The Next Level: Uses for the Resume Parsing Message

2021R1 What's New Post: Configurable Resume Parsing for External Job Applications

Concept: Guidelines for Constrained Prospect Security by Country

Constrained prospect security by country provides a way to restrict which prospect and candidate profiles recruiters can access. It is designed for use cases where customers need to limit visibility based on the prospect's country of residence. This is especially useful for companies that operate in multiple countries and have regional recruiters who should only be able to view and manage prospects in their assigned region. Refer to Steps: Set Up Constrained Prospect Security by Country on page 251 for step by step guidance to configure this feature.

Considerations:

1. Constrained prospect security by region applies only to prospects and candidates with prospect records. Constrained security will not apply if a job application exists without a prospect record.
2. Regions can be inactivated but not deleted. Keep this in mind from a maintenance perspective.
3. Only 1 default region is allowed, and default regions can't be inactive. To inactivate a default region, ensure it's not set to Default.
4. Assign roles to the default region to ensure that prospects from any unassigned country are accessible.
5. Allow 1 to 2 hours for changes to propagate before constrained security takes effect after you create or edit regions, assign roles, or add/remove location hierarchies to regions.
6. The *Candidate Data: Personal Information* domain has also been extended to work with constrained security groups. You can add all security group types that are allowed on the *Candidate Data: Job Application* domain.
7. To achieve constrained prospect access, remove unconstrained security groups from these domains:
    a. *Candidate Data: Job Application*
    b. *Job Requisitions for Recruiting*
    c. *Recruiting Agency Careers Self-Service*
8. This feature is OX 2.0 enabled.
9. Customers who currently use candidate pools with prospects from various countries and regions in a single pool might want to re-evaluate their setup to achieve constrained security by country.

Related Information

Tasks

Steps: Set Up Constrained Prospect Security by Country on page 251

Reference

2025R2 Feature Release Note: Constrained Prospect Security by Country

Reference: Candidate Attachments on Candidate and Worker Profiles

You can configure these domains to grant access to candidate attachments on candidate and worker profiles:

Domain	Attachment
Candidate Data: Attachments	• Generated Standard Attachments • Other Attachments

Domain	Attachment
	• Standard Attachments
Candidate Data: Offer Details	• Generated Offer Attachments • Non-Generated Offer Attachments
Pre-Hire Data: Employment Agreement	• Generated Employment Agreement Attachments • Non-Generated Employment Agreement Attachments

You can create segment-based security groups using these segments to limit view and modify access to candidate attachments:

- *Candidate Resume and Cover Letter*
- *Prospect Resume and Cover Letter*

Note: No other security segment can support the *Candidate as Self* security group.

Worker Profile

Workday enables you to view candidate attachments on the worker profile if you have access to candidate attachments and corresponding worker.

You can't see candidate attachments from linked candidates, or attachments from candidates weren't hired through the Job Application process.

If you want to view a standard review document that relates to an offer on the worker profile, configure both of these domains:

- *Candidate Data: Job Application*.
- *Candidate Data: Offer Details*.

Related Information
Reference
2021R1 What's New Post: Candidate Attachment Security

Prospect and Candidate Management

Steps: Manage Prospects and Candidates

Context

You can create and manage prospects and candidates to track people for job openings at your company. For sensitive job requisitions, you can create confidential prospects with added security.

To decrease recruiter workload, Workday enables you to find and merge duplicate candidates manually or automatically. You can also take action on multiple candidates at once, such as declining their job application or moving them to a different job requisition.

Steps

1. Create Prospects on page 253.
2. Create and manage confidential prospects.

   See Steps: Create Confidential Prospects on page 249.
3. Access the Find Candidates report.

   See Concept: Find Candidates on page 275.
4. Take Action on Multiple Candidates on page 274.

5. Access the View Candidate As Of task.

   You can research changes in profile information for a candidate. Workday doesn't recommend changing profile information from this task because the information isn't current.

   Security: *Candidate Data: Personal Information*
6. Merge Duplicate Candidates on page 304.
7. Create custom Candidate List grids.

   Create custom grid configurations enabling you to view and filter profile information with different worker subtypes.

   See Steps: Maintain Custom Candidate List Grids on page 263.

Related Information
Tasks
Merge Duplicate Candidates on page 304

Steps: Restrict Access to a Candidate's Other Job Applications

Prerequisites

Security: *Set Up: Security Segments* domain in the System functional area.

Context

You can configure segmented security to control who can see job applications for other jobs a candidate has applied to. Example: An employee or contingent worker has applied to a job outside of his organization. Segmented security enables managers to see other job applications for external candidates while restricting them from seeing any other job applications for those candidates who are employees or contingent workers.

Steps

1. Create Segment-Based Security Groups.

   Use these Workday delivered security segments to configure who has access to internal and external job applications:

   - Job Application - Contingent Worker
   - Job Application - Employee
   - Job Application - External
2. Edit Domain Security Policies.

   Add the segment-based security groups with *Modify* access to the Report/Task Permissions section for the *Candidate Data: Job Application* domain in the Recruiting functional area.

   Delete any security groups that you don't want to restrict access to.
3. Activate Pending Security Policy Changes.

Result

Security groups that have access to a job requisition and job application data can see a job application accessed from Jobs Applied To on the candidate profile.

Related Information
Concepts
Concept: Configurable Security

Steps: Set Up Reminders

Context

You can add reminders to your recruiting process. You can maintain reminders in a more efficient way and use them to:

- Follow up and market to passive candidates.
- Contact candidates and prospects.
- Get notifications through email link that include the candidate or job application.
- Get notifications about reminders in Workday.
- View complete or incomplete reminders.
- View all upcoming reminders.

Steps

1. Access the Edit Tenant Setup - Notifications task.

   Select the Enable Reminders check box.

   Security: *Set Up: Tenant Setup - BP and Notifications* in the System functional area.
2. Access the Configure Profile Group task.

   Add Reminders for Candidate Profile and Reminders for Prospect Profile 1 at a time.

   Select the Display in Profile check box for candidate and prospect reminders to add reminders on candidate and prospect profiles.

   Move the upcoming reminders to the top of the grid with the Order arrows.

   Security: *Set Up: System* in the System functional area.
3. (Optional) Access the Configure Profile task.

   Move reminders in the preferred order for Candidate Profile and Prospect Profile.

   Security: *Set Up: System* in the System functional area.
4. Select the Configure Worklet task.

   Access the Recruiting worklet.

   Add View All Upcoming Reminders to the actions list and move it to the desired placement.

   Security: *Set Up: System* in the System functional area.

Result

Recruiters can set personal reminders about specific candidates and prospects that help support a more personalized and efficient recruiting process.

Related Information
Examples
Workday 31 What's New Post: Personal Reminders on Candidates

Steps: Set Up Background Checks for Candidates

Context

You can record background check results on candidate, pre-hire, or worker profiles using the Background Check stage.

Steps

1. Edit Domain Security Policies.

   Configure the security policies for these domains:

   - *Candidate Data: Background Check History* domain in the Recruiting functional area.
   - *Pre-Hire Data: Background Check Status* and *Set Up: Background Checks* domains in the Pre-Hire Process functional area.
2. Edit Business Process Security Policies.

   Configure the *Background Check* business process and security policy.

   Add these steps:

   - *Select Background Check Overall Status*: Assign a background check status.
   - *Make Background Check Decision*: Mark this as the completion step.
3. Set up the integration with your third-party vendor using the Core Connector: Background Check Order Outbound integration.

   See Steps: Set Up Core Connector: Background Check Order Integrations.
4. Access the Maintain Background Check Packages task.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
5. Access the Maintain Background Check Statuses task.

   Security: *Set Up: Background Checks* domain in the Pre-Hire Process functional area.
6. Access the Maintain Background Check Package Conditions Rules task.

   Security: *Set Up: Background Checks* domain in the Pre-Hire Process functional area.

Result

When you advance a candidate to the Background Check stage, Workday:

- Creates a *Background Check* event.
- Sets the status of the candidate to *Background Check*.
- Creates a pre-hire record for the candidate.
- Sends a task to the assigned role's My Tasks for the configured step.

Next Steps

Use the *Put Background Check* web service to upload background check information for multiple records in bulk.

Related Information

Reference

Workday 31 What's New Post: Background Check Condition Rules

Steps: Manage Candidate Pools

Prerequisites

- Use the Maintain Assignable Roles task to select the Candidate Pool Manager role, enable it for *Candidate Pool* organization type, and select the Self-Assign check box for the role.
- For private talent pools, configure the security policies on the *Candidate Pool: Private Pool Create*, *Candidate Pool: Private Pool View and Modify*, and *Candidate Pool: My Private Pools* domains in the Recruiting functional area.
- Security: *Candidate Pool: Create*, *Candidate Pool: View and Modify Pool*, and *Candidate Pool: Manage Membership* in the Recruiting functional area.

Context

Workday enables you to group candidates into candidate pools according to criteria you define. You can use these pools to fill and manage your talent pipeline. Candidate pools can include internal and external candidates.

You can create as many public or private candidate pools as you need and place candidates in multiple pools.

You can provide a custom label for the Add to Pool button using the Maintain Custom Labels task, and this change will reflect everywhere this button exists in Workday.

Steps

1. Access 1 of these tasks:
    - Create Candidate Pool
    - Create Private Candidate Pool

    As you complete the task, consider:

Option	Description
Type	When you select: • Dynamic Pool, Workday automatically and continuously adds candidates that match your search criteria. These pools can include up to 50,000 members. • Static Pool, you can add candidates manually. These pools can include up to 25,000 members. Once you create a pool, you can't change its type.
Restricted View	Only available for public candidate pools. Workday automatically restricts private candidate pools. When you select this check box, users can only see the candidates for job requisitions to which they have access when they view the pool. You must have access to the: • *Candidate Pool: Restricted View* domain can view candidates with job applications in candidate pools. Without access to the domain, you can only view prospects without job applications. • *Prospects* domain in the Recruiting functional area can also see nonconfidential prospects in restricted candidate pools.

    You can't restrict or inactivate any pools from the Edit Candidate Pool task when they're used in active recruiting campaigns.

2. Add members to static candidate pools.

   Use 1 or more of these reports:

   - Find Candidates or Find Workers: Select up to 5000 candidates, and click Add to Pool.
   - View Candidate Pool: Select up to 5000 candidates, and from the related actions menu, select Add to Pool.
   - View Job Requisition: On the Candidates tab, select up to 5000 candidates, and from the related actions menu, select Add to Pool.

     This action is only available if you select a default grid on the Maintain Candidate List Assignment task

   You can add to candidate pools by accessing the:

   - Worker Profile, click the tag icon next to the worker's photo, and select 1 or more candidate pools from the prompt.
   - Prospect or Candidate Profile, use the related actions menu of the prospect or candidate, Candidate Actions select Add to Pool.

   Security:

   - *Candidate Pool: Manage Membership* and *Find Candidates: Internal and External* domains in the Recruiting functional area.
   - *Search: Find Worker* domain in the Worker Profile and Skills functional area.
3. Access the Configure Profile Group task.

   See Steps: Set Up Profiles and Profile Groups.

   From the Profile Group prompt, select *Overview for Candidate Pool*.

   Add the Pool Members report on a new row.

   Select the Display in Profile check box.
4. Define categories and statuses to track candidate readiness on the Maintain Candidate Pool Readiness Statuses task, secured to the *Set Up: Recruiting* domain.

Next Steps

Use the View Candidate Pool report to assign readiness statuses to members.

Steps: Maintain Custom Candidate List Grids

Prerequisites

Security:

- *Grid Management* domain in the System functional area.
- *Set Up: Recruiting* domain in the Recruiting functional area.

Context

Create custom candidate list grids to manage and view candidates for a job requisition. Candidate lists display active and inactive candidates according to stage.

You can define more than 1 grid configuration and associate different grid configurations with specific worker subtypes. Example: Define 1 grid configuration for all candidates and another for seasonal candidates. You can also select a default grid configuration that permanently replaces the Workday-delivered candidate list grid.

Steps

1. Access the Edit Grid Configuration task.

2. Select a grid type:

Option	Description
Grid Configuration	Select a grid that you would like to edit or to create a new grid, select Create > Create Grid Configuration.
What type of grid do you want to create?	To create a new grid, select By Category > Recruiting > Candidate List.
Copy Details from Existing Configurable Grid	To use an existing grid as a template, select Delivered Grid Configurations by Category > Recruiting > Candidate List.

3. Add or remove columns to display on the grid. Consider:

Option	Description
Composite Column	Select the Include Composite Column check box to select up to 3 report fields and 1 image to display in the same column. Note: Workday recommends that you don't use this column type for custom candidate grids.
Individual Columns	Include separate columns for fields and analytics.
Grouped Columns	Group 1 or more fields under a separate tab. Example: Overview contains *Added Date*, *Candidate Location*, and *Current Job Title*.

Workday also recommends that you configure these columns and fields under the Individual Columns and Grouped Column sections:

Option	Description
Read Only	Add Read Only columns to include report fields with job application information from the *Job Applications, Prospects and Referrals* business object. To view jobs that the candidate applied for, include the Jobs Applied For field.
Advanced	To access the task in My Tasks when you have a pending action for the job application, include the Awaiting Me field.

4. Access the Maintain Candidate List Assignment task. Assign a Default Grid to display on the Job Requisition composite view.

Result

On the Candidates tab of the job requisition profile:

- You can save and name up to 10 filters on the candidate list grid for future use.
- Workday records any action taken on more than 1 candidate on the Candidate Search Audit report.
- You can take action on more than 1 candidate when you assign a default grid.

Steps: Maintain Custom Candidate Pool Grids

Prerequisites

Security

- *Grid Management* domain in the System functional area.
- *Set Up: Recruiting* domain in the Recruiting functional area.

Context

Create a configurable grid to manage and view candidate pools. You can define 1 grid configuration for all candidate pools using fields from the External or Internal Candidate business object. We recommend reviewing the grid configuration for the View Candidate Pool task in the Tenant Analyzer report after selecting fields to improve performance.

Steps

1. Access the Maintain Candidate List Assignment task.
2. Select a grid type:

Option	Description
Candidate Pool Grid	Select a grid that you would like to apply or to create a new grid select Create > Create Grid Configuration.
What type of grid do you want to create?	To create a new grid, select By Category > Recruiting > Candidate Pool.
Copy Details from Existing Configurable Grid	To use an existing grid as a template, select Custom Grid Configuration by Category > Recruiting > Default Candidate Pool Grid.

3. Add or remove columns to display on the grid. Consider:

Option	Description
Sorting	Define a field to sort order of the grid.
Composite Column	Select the Include Composite Column check box to select up to 3 report fields and 1 image to display in the same column.
Individual Columns	By default, the Candidate field is available on the grid. Add up to 15 static columns displayed on the left side of the grid.
Grouped Columns	Add up to 15 columns in the Overview section on the right side of the grid.

Workday recommends that you configure Read Only and Editable column types under the Individual Columns and Grouped Columns sections.

Option	Description
Read Only	Add Read Only columns to include report fields with candidate information from the External or Internal Candidate business object.
Editable	To update the status of the candidate, include the Readiness Status field.

4. Change existing Candidate Pool Grids through the Edit Grid Configuration task or by using the View Grid Configuration task and clicking Configure.

Result

On the View Candidate Pool task:

- Only active candidate pools are available.
- Add fields on the View Candidate Pool prefilter page if your dynamic candidate pools exceed 50,000 candidates.
- You can create and save filters for future use.
- You can take action on 1 or more candidates.

Related Information

Tasks

Steps: Manage Candidate Pools on page 261

Reference

Reference: Tenant Analyzer on page 211

2023R1 What's New Post: Candidate Pools Enhancements

Steps: Automatically Advance or Decline Candidates

Prerequisites

- Create candidate dispositions on the Maintain Recruiting Dispositions task.
- Security: These domains in the System functional area:
  - *Business Process Administration*
  - *Manage: Business Process Definitions*

Context

You can use condition rules to automatically advance or decline candidates:

- When a candidate applies to a job. Example: Decline candidates who are ineligible to work in the country where the position is located.
- At any other stage in the recruiting process. Example: Decline candidates who failed the background check.

Workday evaluates condition rules in the order you add them.

You do this by configuring automatic stage routing (ASR) for 1 or more of the business processes of the stages where you want to advance or decline candidates. You can enable ASR for these business processes:

- *Assess Candidate*
- *Background Check*
- *Employment Agreement*
- *Interview*
- *Offer*
- *Reference Check*
- *Review Candidate*
- *Screen*

When you configure automatic stage routing during the initial application, you must add the Candidate Notification Receiver security group to any security domains for fields used within the condition rules applied to the automatic stage routing. Workday evaluates ASR at the end of the step that you configure it on, even if that step is optional or not required.

Steps

1. Create Business Process Condition Rules.

   Create condition rules that determine whether a job application event should continue or end. Use information from the:

   - Job application.
   - Job profile.
   - Job requisition.
   - Questionnaires completed when a candidate first applies.

   Note: If you want to use condition rules for assessment results, create a calculated field for the status of each assessment test result.
2. Access a business process where you want to enable automatic stage routing and add the condition rules.

   From the related actions menu of a business process step, select Business Process > Toggle Automatic Stage Routing:

   - *Review Candidate* business process: Add the condition rule to the *Initiation* step.
   - All other business processes: Add the condition rule on any step.

   If you have parallel steps, automatic stage routing runs after all parallel steps complete.
3. Access the *Job Application* business process.
   a) Click View Dynamic Definition.
   b) Select a stage where you enabled automatic stage routing.
   c) Click Configure Automatic Stage Routing.

      Workday evaluates the rules in the order of display. When a candidate meets a rule, Workday:

      - Processes the step or disposition you selected in the Step column.
      - Ignores all other rules and any remaining business process steps.
   d) Repeat for each additional stage where you enabled automatic stage routing.

Result

When a condition rule is met, Workday automatically moves the candidate to the stage you specified and ignores any remaining rules. The step that you toggle automatic stage routing on must complete before Workday automatically routes candidates to the next stage.

Related Information

Tasks

Steps: Configure the Job Application Business Process on page 197

Reference

The Next Level: Utilize Automatic Stage Routing to Automatically Decline or Move Candidates Forward

Steps: Automatically Decline Candidates for Filled Jobs

Prerequisites

Security: *Move Candidate* domain in the Recruiting functional area.

Context

You can configure Workday to decline the remaining active job applications when you fill the last job opening on a job requisition. A job is filled when a recruiter or hiring manager completes the hiring of a candidate in Workday.

Steps

1. Edit Business Processes.

   Add the *Decline Remaining Candidates* batch process as a step to the *Ready for Hire* business process.

   You can also include a step delay on this business process step so that the initiation doesn't occur until you enter a Candidate Start Date on the offer.
2. Access the Maintain Recruiting Dispositions task.

   Select the Disposition Remaining Candidates check box for the Reason you want to use when closing the remaining job applications on the job requisition. You can only select this check box for 1 reason.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.

Result

When you move a candidate to the Ready for Hire stage and there are no more open positions on the job requisition, Workday:

- Identifies all other candidates who applied to the job requisition.
- Declines their active job applications, and closes their job application events.
- Displays Recruiting System in the Person column on the Event Process History report for the events initiated by this step.

Related Information
Tasks
Maintain Step Delay

Steps: Automatically Decline a Candidate's Remaining Job Applications

Context

You can configure Workday to automatically close the remaining job applications for a candidate when you move them to the *Ready for Hire* stage.

Steps

1. Access the Maintain Recruiting Dispositions task.
   a) Add the disposition you want to use for automatically declined job applications. Example: Candidate Hired for Another Job.
   b) Map the disposition to a Workday-delivered one.

      This mapping displays as the status for automatically declined job applications on the candidate profile.
   c) Select the Disposition Remaining Jobs check box.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
2. Edit the *Job Application* dynamic business process.

   Add the disposition you created in step 1 to the Possible Dispositions section of each stage where you want Workday to close a hired candidate's remaining job applications.

   See Steps: Configure the Job Application Business Process on page 197.
3. Edit Business Processes.

   Add the *Decline Remaining Jobs* batch process as a step to the *Ready for Hire* business process. Workday recommends sending a notification to the recruiter or manager of the jobs for the declined job applications.

Result

When a candidate moves to the *Ready for Hire* stage and reaches this step, Workday:

- Declines their remaining active job applications.
- Displays Recruiting System in the Person column on the Event Process History report for the events initiated by this step.

Related Information
Reference
The Next Level: Automatic Decline and Un-posting Actions

Steps: Set Up Disposition for Purged Candidates

Context

You can configure a recruiting disposition that enables Workday to decline active job applications of candidates that you purge. This can help you reduce the number of tasks in My Tasks that are a result of purged candidates with active job applications.

Steps

1. Access the Maintain Recruiting Dispositions task.

   Select the Default Disposition when Candidate is Purged check box for the Reason you want to use to automatically decline job applications.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
2. From the related actions menu of the *Job Application* business process, select Business Process > Edit Dynamic Definition.

   Select the disposition reason you configured on each stage of the *Job Application* business process.
3. From the related actions menu of the *Job Application* business process, select Business Process Type > Maintain Business Process Definition Selection.

   Select the Use Latest Business Process Definition check box to ensure that Workday declines the remaining applications of candidates you purged before configuring the disposition.

Result

Workday runs a background job every weekday at 8 AM PST that declines:

- Existing job applications with previously purged candidates if the disposition is valid for the job application stage.
- Job applications associated with active candidates that you purge.

You will receive tasks in My Tasks after configuring the disposition, but Workday should eventually clear these items. However, tasks in My Tasks from job applications in the Ready for Hire stage might remain even though you configured the disposition.

Steps: Set Up Conversational Messaging for Candidates

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.

3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- Candidates must have:
  - At least 1 active job application.
  - A phone number for a country that Workday Messaging supports.
  - Opted-in to receive SMS from Workday Messaging.
- Review setup considerations for Workday Messaging.

Context

You can use Candidate Conversational Messaging for SMS to contact candidates quickly and receive timely responses during recruitment. Conversations can involve several members of the hiring team and a candidate using SMS threads within the context of a job application.

Steps

1. Set up Workday Messaging in your Production tenant and acquire a Production and Non-Production phone number for sending SMS messages to candidates.

   See Steps: Set Up Workday Messaging.
2. Edit Domain Security Policies.

   Configure a security policy for the *Manage: Candidate SMS Conversations* domain in the Recruiting functional area.
3. Steps: Set Up Email Notifications for Candidates Conversational Messaging on page 271.

   Configure email notifications for participants to a conversation when they receive a new message.
4. Access the Edit Tenant Setup - Recruiting task.

   On the Days of Open Candidate Conversation After Move to Hire field, enter the number of days you want conversations to stay open after you advance a candidate to the Move to Hire stage.

   On the Days of Open Candidate Conversation After Disposition field, enter the number of days you want conversations to stay open after you Disposition a candidate.

Result

To send a message, access the candidate profile and select the Candidate SMS icon on the collaboration panel.

Candidate SMS messages have a limit of 160 characters.

Security groups with Modify access to the job application can view and send messages to the candidate.

Example

Recruiter Alex initiates a conversation with candidate Rema to schedule an interview for the marketing executive role. Alex goes on leave but the hiring manager Sandra has access to the job application. Sandra messages Rema that Alex is on leave, but the interview will go ahead as scheduled.

Next Steps

Participants to the conversation receive notifications of new SMS messages through:

- A notification on the Collaboration Panel.
- A notification in My Conversations, if configured. Otherwise, the notification appears on the notifications page (bell icon).
- Email, if configured.

Workday displays unanswered messages on the Unanswered Conversations card to the Recruiter Hub. When any participant to a conversation responds to a message, Workday removes the read message from the card.

Related Information
Concepts
Concept: Candidate Conversational Messaging for SMS on page 278
Tasks
Steps: Set Up Email Notifications for Candidates Conversational Messaging on page 271
Steps: Set Up My Conversations Security
Reference
2024R1 What's New Post: Candidate Conversational Messaging for SMS

Steps: Set Up Email Notifications for Candidates Conversational Messaging

Prerequisites

Security:*Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can configure email notifications for participants in a candidate conversation to alert them when there's a new message in an active conversation.

Steps

1. Access the Edit Tenant Setup - Notifications task.
2. On the Notification Delivery Settings section, select *Recruiting*.
3. In the Notification Type section, select Candidate SMS Messages.

   The Notification Type Candidate SMS Messages is for two-way messaging notifications delivered through email.
4. Select the Override Parent Notification Type Settings check box.
5. On the Rule prompt, select Create Notification Routing Rule.

   As you complete the Create Notification Routing Rule section, consider:

Option	Description
Name	Enter a name that describes the message type. Example: *Incoming Candidate SMS*.
Description	(Optional)

Option	Description
Notification Type Usage	*Candidate SMS Messages*

6. On the Channel Frequencies section, click Add and enter these values:

Field	Value
Channel	*Email*
Default Frequency	*Immediately*

7. On the Delivery Override section, click Add, and select the Channel and the Configuration.

Result

Workday sends email notifications of new SMS messages to the primary recruiter and all participants in a candidate conversation.

Example

Next Steps

Related Information

Concepts

Concept: Candidate Conversational Messaging for SMS on page 278

Tasks

Steps: Set Up Conversational Messaging for Candidates on page 269

Reference

2024R1 What's New Post: Candidate Conversational Messaging for SMS

Maintain Recruiting Sources

Prerequisites

- Set up the social networks you want to track using the Maintain Social Network Types task.
- Security: *Set Up: Pre-Hire Process* domain in the Pre-Hire Process functional area.

Context

Recruiting sources track where you post jobs and where your candidates come from. Workday assigns a recruiting source to a candidate when creating their job application. You can manually assign a different source to the candidate by editing their job application. You can also use the *Put Candidate* web service to assign recruiting sources to candidates.

Steps

1. Access the Maintain Recruiting Sources task.
2. (Optional) Enable recruiting source categorization on external and internal non-worker career sites by selecting the Allow Recruiting Source Categorization on Career Sites check box.

   Workday categorizes sources on the How Did You Hear About Us? prompt when career sites have 8 or more sources configured for 2 or more categories.

3. Create and edit recruiting sources.

   Custom recruiting sources display in prompts and reports. You can optionally map them to Workday-delivered sources in the Maps To column. You can't map more than 1 custom source to the same Workday-delivered source.

   The Source Administrator column represents the worker assigned to manage a particular recruiting source. This column is for informational purposes only.

   Workday delivers these recruiting sources:

Option	Description
Employee Referral	Applications created using the: • Create a Referral task. • Refer button on a job posting. • Refer a Candidate task. • *Refer a Candidate* web service.
Internal Application	Applications from your internal career site.
Proxy Referral	Applications created using the Create Job Application task.
Recruiting Campaigns	Applications submitted by campaign email recipients.
Recruiting Landing Pages	Applications submitted by landing page visitors and prospects.
Recruiting Events	Applications submitted by registered recruiting event participants.
Self Identified	Applications for external candidates who identify a Referred By worker. You can configure Workday to automatically send the worker a request to endorse the candidate's job application.
Endorsement Denied	Applications for external candidates whose self-identified referring worker refused to endorse their job application.
Social Share: <Name>	Applications created using a link from: • Email • Facebook • LinkedIn • Twitter

   Deleting a category deletes all the sources within it. You can only delete a category if its sources aren't in use.

Example

Source Category	Source	Maps To
Internal Worker	Internal	Internal Application
Employee Referral	Referral	Employee Referral
	Referred by Proxy	Proxy Referral

Source Category	Source	Maps To
	I know someone at the company	Self Identified
Social Referral	Facebook	Social Share: Facebook
	LinkedIn	Social Share: LinkedIn
	Twitter	Social Share: Twitter
	Email	Social Share: Email
Recruiter / Agency	Agency	
	Recruiter	
Corporate Website	University Website	
	Corporate Website	
Job Posting Site	Indeed	
	Monster	
	LinkedIn	
Campus Campaign	Vocational	
	Polytechnic	
	University	
LinkedIn Middleware	LinkedIn Recruiting	LinkedIn Job Posting

Related Information
Tasks
Steps: Set Up Recruiting on page 191
Steps: Set Up Endorsements on page 440

Take Action on Multiple Candidates

Prerequisites

- Select a default grid in the Maintain Candidate List Assignment task. Workday recommends that you select the *Default Candidate List Grid*.
- Security: These domains in the Recruiting functional area:
  - *Candidate Communication*
  - *Move Candidate*
  - *Move Candidate to Linked Job Requisition*

Context

Workday enables you to take action on multiple candidates who have active job applications for a job requisition. Example: After you fill a job requisition, decline the remaining candidates.

When you complete this task on behalf of another user who is assigned to the active candidates, Workday removes their pending task in My Tasks.

Steps

1. Access the View Job Requisition report.
2. On the Candidates tab, select 1 or more candidates.

3. Select an action to perform.

Option	Description
Move Forward	Workday recommends you only Move Forward candidates who are in the same stage.
Move to Linked Evergreen Requisition	You can't move candidates who are in the *Ready for Hire* stage. Note: You can only move candidates to a common evergreen requisition.
Copy to Another Job Requisition	When you copy an application to another job requisition, Workday moves the candidate to the *Review* stage. You can't copy a candidate's job application to another job requisition if the: • Candidate is confidential or has a job application for the target job requisition. • Target job requisition is confidential, frozen, closed, or filled. Security: *Copy Candidate* domain in the Recruiting functional area. To copy the personal information of the candidate with their job application, select the Copy Personal Information when Copying Job Applications check box on the Edit Tenant Setup - Recruiting task.

Related Information

Tasks

Steps: Set Up Prospects and Candidates on page 245

Concept: Find Candidates

To search for candidates, you can use the:

- Global search.
- Find Candidates report, for your entire candidate population.
- My Candidates report, which displays candidates for whom you are the recruiter or manager.

Candidate Search Security

These domains in the Recruiting functional area secure access to candidate search:

- *Candidate: Global Search*
- *Candidates for My Jobs*
- *Employee Referrals*
- *Find Candidates: External*
- *Find Candidates: Internal and External*

The *Reports: Headcount Planning* domain in the Headcount Planning functional area secures access to internal candidate search.

Confidential Candidates

If you have access to view them, confidential candidates display on the:

- Find Candidates report only if they apply for a nonconfidential job requisition.
- My Candidates report.

Report Facets

Facets enable you to filter candidates based on 1 or more criteria. Workday uses information on the:

- Primary job for internal candidates.
- All job applications for external candidates.

Candidate Actions

The Find Candidates and My Candidates reports enable you to perform these actions:

Action	Secured To Domain
Add to Pool	• *Candidate Pool: Manage Membership* • *Talent Pool: Manage Membership*
Compare	• *Find Candidates: Internal and External* • *My Candidates*
Invite to Apply	*Invite to Apply*
Send Message	*Candidate Communication*

Related Information
Tasks
Configure Faceted Search Reports for Mobile

Concept: Recruiting Source Tracking

You can configure Workday to track sources from job boards using the Recruiting Sources for Auto-Tracking prompt on these tasks:

- Create External Career Site
- Edit External Career Site

Provide the source ID value to your job board vendor. When a candidate applies to a job using a URL that contains a source ID that you've configured in the prompt, Workday automatically assigns the source to the candidate.

Workday also hides the How Did You Hear About Us? question on the:

- Job application.
- Review page.
- View My Submitted Application page.

Concept: Candidates by Active Stage

The Candidates by Active Stage analytic displays these statistics for each active stage of the recruiting process:

- Number of active candidates.
- Percent of dispositioned candidates.
- Percent of candidates that moved to another stage.

You can view this analytic on the:

- Overview profile group on the job requisition profile.
- Job requisition, by selecting Active Candidates. This option only displays if 1 or more candidates applied to the job requisition.

The Active Candidates report is Workday-defined and only available on mobile. It returns candidates for job requisitions in all recruiting stages, except *Ready for Hire* and *Disposition* stages. It only returns results for a job requisition if the user is in a:

- Primary recruiter role.
- Leadership role other than a recruiter role.
- Recruiter role when no primary recruiter role exists.

Candidate Lists

When you select a default grid on the Maintain Candidate List Assignment task, you can take action on candidates from the Candidates by Active Stage analytic.

Note: Workday recommends that you assign Job Requisition Default as the default candidate list grid. Assigning a default grid permanently replaces the Workday-delivered grid.

Example

This example displays how Workday calculates Conversion and Drop Off percentages for a job requisition for which 44 candidates applied.

Stage	Active Candidates	Inactive Candidates	Total Candidates	Drop Off	Conversion
Review	9	7	16	16% 7/44	64% (44-16)/44
Screen	7	3	10	11% 3/(44-16)	64% (44-16-10)/(44-16)
Assessment	5	3	8	17% 3/(44-16-10)	56% (44-16-10-8)/(44-16-10)
Interview	3	1	4	10% 1/(44-16-10-8)	60% (44-16-10-8-4)/(44-16-10-8)
Reference Check	2	1	3	17% 1/(44-16-10-8-4)	50% (44-16-10-8-4-3)/(44-16-10-8-4)
Offer	1	1	2	33% 1/(44-16-10-8-4-3)	33% (44-16-10-8-4-3-2)/(44-16-10-8-4-3)
Background Check	1	0	1	0% 0/(44-16-10-8-4-3-2)	0% (44-16-10-8-4-3-2-1)/(44-16-10-8-4-3-2)
Ready for Hire	0	0	0	0% 0/[(44-16-10-8-4-3-2-1)+1]	0% (44-16-10-8-4-3-2-1-0)/[(44-16-10-8-4-3-2-1)+1]

Concept: Candidate Conversational Messaging for SMS

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.

Candidate Conversational Messaging for SMS enhances efficiency in the job application process by enabling hiring teams to conduct interactive conversations with candidates. This improves candidate engagement and provides cross-team visibility of candidate conversations.

Conversations can involve several team members and a candidate using SMS threads within the context of a job application, increasing agility as all members of your hiring team have context from previous messages with the candidate.

Example: A candidate applies for 2 jobs on different teams. The candidate is opted-in to receive SMS from Workday Messaging. There are separate recruiters and hiring managers with access to the candidate's job applications, which are at different stages. Recruiter 1 uses SMS to ask the candidate about scheduling an interview. Recruiter 2 uses SMS to request missing information to complete the offer process.

Messaging on Collaboration Panel

Security: *Manage: Candidate SMS Conversations* in the system functional area.

You can configure Candidate Conversational SMS on the Collaboration Panel independently of:

- *Candidate Notes*.
- *Candidate Job Application Notes*.

Hiring Team Experience

You must have access to the candidate's job application to send messages and receive free form SMS from participating candidates.

You can configure which security groups have permission to access Candidate SMS conversations from the Collaboration Panel on the candidate profile. This functionality is only available for candidates.

For this release, the Candidate Conversational Message for SMS is available on desktop only.

Security groups with View access to the *Manage: Candidate SMS Conversations* domain can view the conversations but can’t contribute.

Security groups with Modify access can view and send messages to candidates.

You can't edit SMS messages.

Workday notifies conversation participants, who already sent a message in the conversation, about incoming messages from an active SMS conversation through:

- A notification on the Collaboration Panel.
- A notification in My Conversations, if configured. Otherwise, the notification appears on the notifications page (bell icon).
- Email, if configured.

Workday batches email and bell notifications immediately.

Candidate Experience

Candidates can participate in Candidate Conversational Messaging for SMS if they:

- Opt-in to receive SMS from Workday Messaging.
- Have a phone number for a country that Workday Messaging supports.
- Have at least 1 active job application.

The phone number that candidates receive messages from differs per job application.

Candidates can't initiate conversations. Only a hiring team member can start the conversation.

Candidates don’t see the role of the message sender in the SMS. For clarity, hiring team members can include their details when sending the SMS.

Conversation Lifecycle

Conversations are group threads specific to job applications.

Only participants to a conversation thread receive notifications of new messages.

You can use these fields on the Edit Tenant Setup – Recruiting task, to specify the duration you want candidate conversations to remain open after Move to Hire or Disposition:

- Days of Open Candidate Conversation After Move to Hire
- Days of Open Candidate Conversation After Disposition

If you don't specify a duration to keep candidate conversations open, Workday automatically closes the conversation after 180 days or at the end of the day in the job requisition’s timezone on:

- *Disposition*
- *Move to Hire*

Candidate conversations also end when the:

- Candidate withdraws application.
- Candidate changes their opt-in phone number.
- Job application is rescinded or canceled.

When a conversation ends:

- No new messages can be sent or received for that job application.
- Hiring team can still see all previous messages. You can configure security settings to specify which members of the team have access to this information.
- Hiring team can see a message at the bottom of the panel informing them that the conversation has ended.
- Workday doesn't inform candidates that conversations has closed.

Note: On non-production tenants, candidate conversations have a lifespan of less than a day and are closed after 6 hours.

Data Purging

Notifications

You can purge candidate conversational messages when you select the *Job Application Conversational Messaging* purgeable data type when using the Purge Person Data task to purge a job application or a candidate.

When you select the *Job Application Conversational Messaging* purgeable data type, Workday purges all conversational messages associated with the job application or the worker from the:

- Candidate profile
- Candidate Communications Report
- Activity Stream
- Recruiting History Timeline
- Report Fields
- Audit Trail

You can configure email notifications that conversation participants receive when they receive a new message in a conversation in which they are participants.

Related Information

Tasks

Steps: Set Up Conversational Messaging for Candidates on page 269

Steps: Set Up My Conversations Security

Reference

2024R1 What's New Post: Candidate Conversational Messaging for SMS

Example: Automatically Decline Remaining Candidates on Close Job Requisition

This example illustrates how to automatically decline all the unhired candidates when you close a job requisition.

Context

As HR Administrator, you now want to close a job requisition that still has several active candidates on these stages of the job application:

- *Review*
- *Screen*

You also want all the unhired candidates to have the same disposition reason.

Prerequisites

Security: *Move Candidate* domain in the Recruiting functional area.

Steps

1. Access the Maintain Recruiting Dispositions task.
2. Add a row, and the Reason: *Job Requisition Closed*.
3. On the Maps to column select: *Rejected*.
4. Select the check box on the Disposition Candidates on Close Job Requisition column.
5. Click OK and Done.
6. Access the *Job Application* business process.
7. Click Edit Dynamic Definition.
8. On the Review tab, add a row to the Possible Dispositions section.
9. On the Disposition section, select *Job Requisition Closed* from the prompt.

   Add the same disposition to the Possible Dispositions section of the Screen stage.
10. Click OK and Done.
11. Access the *Close Job Requisition* business process.
12. From the related actions menu of the Close Job Requisition business process, select Business Process > Edit Definition.
13. Under the Business Process Steps section, add a row and these values:

Option	Description
Type	*Batch/Job*
Specify	*Decline Remaining Candidates for Close Job Requisition.*
Run As User	*HR Admin*

14. Click OK and Done.
15. Access the Configure Optional Fields task.
16. Select *Close Job Requisition* on the By Functional Area prompt.

17. Remove the row *Decline Remaining Candidates* so as to display the Decline Remaining Candidates check box on the Close Job Requisition task.

Result

When you close a job requisition and you select the Decline Remaining Candidates check box, Workday:

- Dispositions all the remaining candidates on the Review and Screen stages.
- Displays *Job Requisition Closed* as the Disposition Reason.

Next Steps

Related Information
Tasks
Steps: Automatically Decline a Candidate's Remaining Job Applications on page 268

Example: Return Candidate to the Recruiting Process

This example illustrates how to move a candidate from the hire process back to the recruiting process when you need to renegotiate an offer.

Context

As a recruiting administrator, Sofia needs to renegotiate an offer for a candidate who is currently in the Ready for Hire stage. Before she can renegotiate the offer, Sofia has to move the candidate back to the job application process.

Prerequisites

Security: *Undo Move from Hire* domain in the Recruiting functional area.

Steps

1. Access the Maintain Event Categories and Reasons task.
2. Select Undo Move in the Event prompt.
3. Click OK.
4. On the Undo Move Category grid, add a new row.
5. In the row you created, add a Reason row.
6. Enter these values:

Option	Description
Reason Category	*Offer Adjusted*
Reason	*Renegotiate Offer*
Manager Reason	Select the check box.

7. Click OK and Done.
8. Access the candidate profile.
9. Select Job Application > Undo Move from Hire from the related actions menu of the candidate profile.
10. Click OK.
11. In the Reason prompt, select Offer Adjusted > Renegotiate Offer.
12. Click Submit.

Result

Workday reverts the candidate to the *Make Decision* step of the last stage of the *Job Application* business process.

Candidate Skills Match

Steps: Set Up Candidate Skills Match

Context

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

You can configure your tenant to review candidate job applications and assign a Skills Match Score based on the similarity of skills between the job application and job requisition. You can also configure the candidate grid on the job requisition to display the Skills Match Score and score details for each job application. Recruiters might use this machine learning-powered analysis of candidates' applications to improve the efficiency of the application review process.

Note: Workday continues to monitor and periodically test the Candidate Skills Match feature to proactively identify impermissible bias in light of the evolving nature of machine learning tools. To uphold our commitment to ethical AI, Workday reserves the right to change the Candidate Skills Match feature and accompanying functionality (e.g., match details functionality). Where reasonably possible, Workday will provide advance notice of such changes to customers.

Customers are responsible for understanding and complying with any legal obligations arising from their use of Candidate Skills Match, including any assessment, testing, or documentation that may be required under anti-discrimination laws. Customers should consult with their legal counsel to determine whether their configuration and use of Candidate Skills Match satisfies their organization's compliance requirements.

Steps

1. Enable Skills Cloud on page 1854.

2. Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers.

   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.

   On the Innovation Services Opt-In task, select the HCM ML Features and Third Party Connectors GA service on the Available Services tab in the HCM category.
3. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality.

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.
4. Edit Domain Security Policies.

   Configure these domains in the Recruiting functional area:

   - *Candidate Data: Candidate Skills Match*
   - *Candidate Skills Match Details Lookup*
5. Activate Pending Security Policy Changes.
6. Access the Edit Tenant Setup - Recruiting task.

   Use the Candidate Skills Match Location Exclusion and Candidate Skills Match Location Hierarchy Exclusion prompts to select which locations to exclude from Candidate Skills Match.

   See Reference: Edit Tenant Setup - Recruiting.
7. Configure the candidate list grid on job requisitions to display skills match scores.

   From the Grid Configuration prompt on the Edit Grid Configuration task, select *Default Candidate List Grid* or a custom grid used on the job requisition. On the Individual Columns grid, add these fields that are on the Job Application business object.

   - Skills Match Score Details
   - (Optional) Skills Match Score
   - (Optional) Skills Matched
   - (Optional) Skills Not Found

   See Steps: Maintain Custom Candidate List Grids on page 263.

Result

A background process automatically begins scoring all active job applications on open job requisitions.

If you exclude a location after Workday calculated a skills match score for a candidate application, the score will still be available. You can use the Maintain Candidate List Assignment task to create a condition that hides these scores for excluded locations or location hierarchies.

Next Steps

Access the Innovation Services Summary report (secured to the *Manage: Innovation Services* and *View: Innovation Services* domains) to view service opt-in status and last-modified information, and to access the service descriptions on Workday Community.

Create a custom report with these fields on the Job Application business object to assess Candidate Skills Match data:

- Skills Match Score Details
- Skills Match Score
- Skills Matched
- Skills Not Found

Related Information

Reference

2023R1 What's New Post: Candidate Skills Match Location Exclusion

2021R2 What's New Post: Candidate Skills Match

Available Innovation Services – Service Descriptions and Exhibits

Workday AI Fact Sheets: Candidate Skills Match

Concept: Candidate Skills Match

Workday uses machine learning algorithms to calculate skills match similarity. We calculate the similarity based on how well the skills derived from the candidate's job application match skills derived from the job requisition.

For calculations, Workday uses Skills Cloud skills:

- Derived from the job application and resume.
- That applicants enter on the job application and resumes.
- Derived from the job details and qualifications sections on the job requisition.
- That recruiters enter on the job requisition.

Workday processes applicant resumes in these file types:

- DOC
- DOCX
- HTM
- HTML
- PDF
- RTF
- TXT

The skills match similarity improves as the skills on the job application match more of the job requisition. Workday assigns greater weight to job applications with the required skills specified on the job requisition. Possible skills match scores are:

- Strong
- Good
- Fair
- Low
- Pending
- Unable to Score

Score Details

When you configure your job requisition to display Skills Match Score Details, you can drill down on the score to view:

- Education and certification details on the job application.
- Job experience details on the job application.
- Skills match details.

Details display on these sections when applicable:

Section	Considerations
Required Skills	Relevant skills on the job application that match required skills on the job requisition. Workday assigns greater weight to these skills in the match calculation.

Section	Considerations
Relevant Skills	All other skills on the job application that match the skills on the job requisition.
Skills Not Found	Skills on the job requisition that aren't on the job application.

Any masked information doesn’t display in the skills match details.

Score Processing

When you first set up this feature, the background process calculates the skills match for all active job applications on open job requisitions. These results display on the candidate list grid on the job requisition. Depending on the volume, this process can take a few hours to days.

After the initial calculation, the background process runs every hour to calculate skills match for job applications. The background process calculates a match for an active job application when you create, update, or partially purge a job application or associated job requisition.

Workday scores most job applications through the background process every hour, however Workday immediately scores job applications when you:

- Add resume attachments from the Attachments profile group of the job application.
- Edit the job application using the related actions menu.
- Move the job application.
- Reactivate the job application.
- Use the Create Job Application task.
- Use the Edit Evergreen Requisition task.
- Use the Edit Job Requisition task.

Workday can’t calculate a skills match score and displays Low or Unable to Score when:

- Either or both the job application or job requisition are in another language than English.
- Either or both the job application or job requisition don’t have enough skills data.
- The uploaded resume is in an unsupported format.
- A recruiter or administrator completely purges the job application or the candidate.

Skills match score calculation doesn’t consider:

- How recently a candidate has acquired relevant skills.
- How long a candidate used relevant skills.
- Years of total work experience.

Reset Skills Match Scores

If you disable Candidate Skills Match and want to re-enable it, you can reset skills match scores for all active job applications so that the scores reflect the latest changes to the job application and requisitions. You can use the Reset Skills Match Scores task only while the feature remains disabled. Once reset, you can’t undo this change.

Candidate Ranking

Steps: Set Up Candidate Rating and Ranking

Prerequisites

Create job requisitions or evergreen requisitions.

Context

You can rank candidates of a job requisition or evergreen requisition by assigning a candidate ranking template. Configure ranking templates to specify the criteria to rank candidates and how Workday calculates rankings.

Steps

1. Edit Domain Security Policies

   Configure these domains in the Recruiting functional area:

   - *Process: Rating and Ranking*
   - *Process: Ranking - Link Job Requisition*
   - *Set Up: Ranking*
   - *Set Up: Rating*
2. Create Candidate Rating Template on page 287.
3. Create candidate rating templates to assign to job requisitions.
4. Access the Assign Candidate Rating Template task.

   Select the job requisitions that you want to apply the rating template to.

   Security: *Set Up: Rating* domain in the Recruiting functional area.
5. Create Candidate Ranking Template on page 288.

   Create candidate ranking templates to assign to job requisitions.
6. Access the Assign Candidate Ranking Template task.

   Select the job requisitions that you want to apply the ranking template to.

   Security: *Set Up: Ranking* domain in the Recruiting functional area.
7. Access the Edit Grid Configuration task.

   Edit the configuration for the Default Candidate List Grid or a custom grid used for job requisitions.

   For ratings, select *Candidate Rating* from the Field prompt in the Individual Columns grid

   For rankings, select:

   - *Candidate Rank (Sort)* from the Field prompt in the Sorting section.
   - *Candidate Rank* from the Field prompt in the Individual Columns grid.

   Security: *Grid Management* domain in the System functional area.
8. Access the Configure Profile Summary task.

   For the Candidate Profile, add the Candidate Rating report as a profile card. Users with access to a candidate's profile can view the candidate's rating from the profile and can view additional rating details.

Result

If you enable candidate ranking, Workday displays a Rank Candidates button in the Candidates list of a job requisition with a ranking template. Recruiters can use this button to have Workday calculate candidate rankings for the requisition.

If you enable candidate rating, Workday automatically calculates ratings when you view the candidate grid or the Candidate Rating report from the candidate profile.

Related Information

Reference

2023R1 What's New Post: Candidate Ranking

2024R1 What's New Post: Candidate Rating

Create Candidate Rating Template

Prerequisites

Security: Set Up: Rating domain in these functional areas:

- Recruiting
- Talent Pipeline

Context

Create candidate rating templates to define how Workday calculates ratings for candidates on a job requisition or evergreen requisition.

Steps

1. Access the Create Candidate Rating Template task.
2. As you complete the Rating Criteria grid, consider:

Option	Description
Rating Field	Select the fields that you want to use as the criteria to rate candidates.
Rating Field Score Mapping	Select the rating data mapping that determines how candidates are scored. This prompt displays once you select a rating field.
Weight	Enter a number that determines the importance of the rating field when Workday calculates candidate ratings. The total weight from all rows must be less than or equal to 100.

3. If you need to create a rating data mapping for a rating field, access the Create Rating Data Mapping task from the Rating Field Score Mapping prompt.
4. Configure the rating data mapping by selecting or entering the rating field values and assigning a score to each row.

Example

This example illustrates how you can configure a candidate rating template with Degrees and Candidate City as the rating fields:

Rating Criteria

Rating Field	Weight
Degrees	40
Candidate City	60

Rating Data Mapping

Rating Field Score Mapping	Rating Field Value: Score
Degrees Score Mapping	PhD: 100 (maximum score) M.S.: 90 B.S.: 80

Rating Field Score Mapping	Rating Field Value: Score
Candidate City Score Mapping	Atlanta: 100 (maximum score) Dublin: 80

If a candidate lists Atlanta as their city and B.S. as their degree on their application, their total score based on this template configuration will be:

- Location: (100/100) x 60 = 60
- Degree (80/100) x 40 = 32
- Total Candidate Rating: (60 + 32) = 92

Next Steps

Assign the candidate rating template to a job requisition or evergreen requisition.

Create Candidate Ranking Template

Prerequisites

Security: *Set Up: Ranking* domain in the Recruiting functional area.

Context

Create candidate ranking templates to define how candidates are ranked on a job requisition. You can rank candidates based on any of these types of fields on the Job Applications, Prospects and Referrals business object:

- Boolean
- Instance
- Numeric
- Text

Steps

1. Access the Create Candidate Ranking Template task.
2. As you complete the Ranking Order & Sort grid, consider:

Option	Description
Ranking Field	Select the field to use as a ranking criteria for the template.
Ranking Field Priority Mapping	Select the ranking data mapping that determines how candidates are ranked with instance or text fields. This prompt only displays if you select a ranking field that's either an instance or text field. If there are no ranking data mappings for the field, access the Create Ranking Data Mapping task from the prompt to create one.
Sort Direction	Select how Workday should sort the candidate ranking results for the field.

3. If you need a ranking data mapping for an instance or text field, access the Create Ranking Data Mapping task from the Ranking Field Priority Mapping prompt.

4. As you complete this task, consider:

Option	Description
Ranking Field Instance Value	Select the options that you want to use as ranking criteria for the ranking field. You can select multiple options for each row. This prompt only applies to instance ranking fields.
Ranking Field Text Value	Enter the text that you want to use as a ranking criteria for the ranking field. This field only applies to text ranking fields.
Priority	Enter a whole number greater than zero that represents the priority of the options you selected or text your entered. Workday uses this number to calculate how to rank candidates.

Next Steps

Assign the candidate ranking template to a job requisition.

Certificate of Eligibles

Concept: Certificate of Eligibles

Certificate of Eligibles, also called *eligibility list* or *candidate list*, enables selecting officials to generate a list of eligible candidates for job requisitions. Having a list of eligible candidates expedites the selection process for hiring managers for state, local, and federal government.

You can determine the criteria for placing a candidate on a certificate and then add the candidates to the certificate from the Create Certificate of Eligibles task. The criteria can include candidate rating, candidate ranking, and veteran's preference. A certificate must be returned or expired before you can create a new certificate.

The following scenarios require a new certificate on the job requisition:

- When a certificate expires, the hiring manager can no longer hire or disposition a candidate from the certificate.
- If a candidate gets moved from one job requisition to another, the candidate will not remain on the original certificate.
- If a job application is moved to a different job requisition.

When a candidate is moved to a different job requisition, any existing certificates associated with the original requisition will no longer include that candidate. To generate a certificate for the candidate on the new job requisition, a new certificate must be created. Certificates are tied to job requisitions, not candidates, and therefore do not follow the applicant. A candidate can be listed on multiple certificates across different requisitions, however each certificate is unique to its specific requisition. Once the certificate has been issued, the candidate certificates cannot be changed. The certificate can be rescinded or returned by the hiring manager and a new certificate can be issued.

Business Processes

The *Create Certificate of Eligibles* business process is initiated by the Create Certificate of Eligibles task. The *Return Certificate of Eligibles* business process and the Return Certificate of Eligibles task (accessed from the certificate) enables you to request additional candidates.

In addition, you can choose to save the task for later and revisit your candidate list with the Revise Certificate of Eligibles task that you can access from My Tasks or the Revise Certificate of Eligibles button on the Candidates tab.

Grid Configuration

You can customize and configure the Certificate of Eligibles grid using the Maintain Candidate List Assignment task.

Auditing

Auditors can be granted separate access to the Audit Certificate of Eligibles task and can add comments about the certificate. From the certificate, click Audit History.

Reporting

You can use the View Certificate of Eligibles report to obtain a list of candidates by job requisition and profile.

Related Information

Tasks

Steps: Set Up Certificate of Eligibles on page 290

Reference

2025R1 Release Note: Certificate of Eligibles

Steps: Set Up Certificate of Eligibles

Prerequisites

Create job requisitions or evergreen requisitions.

Context

Create a certificate of eligibles for job requisitions or evergreen requisitions. You can determine the criteria for placing a candidate on a certificate and then generate a list of eligible candidates for job requisitions.

Steps

1. Access the Edit Tenant Setup - HCM task.

   Configure the ID Definition for Certificate of Eligibles if a specific pattern for the certificate number is needed.

   See ../../../../manage-workday/tenant-configuration/tenant-setup/dan1370796358261.ditaCreate ID Definitions and Sequence Generators
2. ../../../../authentication-and-security/configurable-security/security-policies/dan1370797389950.dita.

   Configure these domains in the Recruiting functional area:

   - *Audit: Certificate of Eligibles*
   - *Manage: Certificate of Eligibles*
3. Add the Certificate of Eligibles tab on the Job Requisition View:

   - Access the Configure Profile Group task.
   - Select Candidates for Job Requisition Composite View.
   - Add Certificate of Eligibles.

4. ../../../../authentication-and-security/configurable-security/security-groups/segment-based-security-groups/dan1370797248403.dita.

   Set up the following access rights:

   - Active Certificate of Eligibles
   - All Certificate of Eligibles
5. ../../../../manage-workday/business-processes/customize-business-processes/dan1370797384762.ditaEdit Business Processes.

   Set up the following business processes:

   - Create Certificate of Eligibles
   - Return Certificate of Eligibles
6. Access the Maintain Candidate List Assignment task.

   Select the custom grid in the ~Certificate of Eligibles~ Grid prompt.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
7. Access the Edit Grid Configuration task.

   Edit the configuration for the Certificate of Eligibles grid or a custom grid used for job requisitions.

   Security: *Grid Management* domain in the System functional area.

Result

On the Certificate of Eligibles tab of the job requisition profile, click Certificate of Eligibles to create a certificate.

Related Information

Concepts

Concept: Certificate of Eligibles on page 289

Tasks

Steps: Set Up Candidate Rating and Ranking on page 285

../../../../education-and-government/us-federal-employment/human-capital-management---federal/recruiting/steps--set-up-u-s--federal-veteran-s-preference-for-recruiting.dita

Reference

2025R1 Release Note: Certificate of Eligibles

2024R1 What's New Post: Candidate Rating

Candidate Work Availability

Steps: Set Up Candidate Work Availability

Context

You can configure candidate availability templates to collect the days and times candidates are available to work. These configured time slots are then displayed for external candidates on the external job application.

Steps

1. Access the Create Candidate Availability Template task.

   Enter start and end times for each day of the week to create work availability time slots. Make sure the time slots you create:

   - Don't overlap.
   - Don’t have duplicates.
   - Are within the same day

   Example: For work availability that spans overnight, you could create a time slot that goes from Monday 8 PM to 11:59 PM and then another time slot that goes from Tuesday 12 AM to 4 AM.

   Security: *Set Up: Candidate Availability Template* domain in the Recruiting functional area.
2. Access the Maintain Job Requisition Candidate Availability Defaults task.

   Select a Job Requisition Event Condition Rule.

   Select a Candidate Availability Template. The first rule in the table is the defaulting rule. Make sure you associate each unique condition rule with one template.

   Security: *Set Up: Candidate Availability Template* domain in the Recruiting functional area.
3. Create and Edit Job Requisitions on page 611.

   Create a new job requisition.

   The template is automatically assigned to the new job requisition if it meets any of the condition rules set up in the Maintain Job Requisition Candidate Availability Defaults task.

   The corresponding candidate availability template will appear in the Details tab on the job requisition.
4. Access the Edit Grid Configuration task to display time slots and availability report fields on the Candidate grid.

   Edit the configuration for the Default Candidate List Grid or a custom grid used for job requisitions.

   Add time slots and the availability report fields that you want to display on the grid.
5. Access the Configure Profile task.

   Add the Candidate Work Availability section to the Candidate Profile.

   Select the Display in Profile check box.

Related Information
Examples
2025R2 Release Note: Candidate Availability for High Volume Recruiting

Candidate Self-Scheduling

Setup Considerations: Candidate Self-Scheduling

You can use this topic to help make decisions when planning your configuration and use of Candidate Self-Scheduling. 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 create calendars for high-volume recruiting events that candidates can use to reserve and manage event time slots. Example: Interviews, orientations, assessments, phone screenings, and campus recruiting events. Recruiters can also schedule and manage event time slots on behalf of candidates.

Business Benefits

Candidate Self-Scheduling:

- Improves recruiter efficiency by reducing the need for manual scheduling administration.
- Streamlines your ability to view, manage, and report on recruiting event metrics.
- Enhances the candidate experience by giving candidates control over their scheduled events.

Use Cases

Candidate Self-Scheduling enables you to:

- Use self-schedule calendars at any stage of the recruiting process for high-volume recruiting events.
- Schedule, reschedule, and cancel events on behalf of a candidate.
- Send tasks to candidates to schedule themselves for an event.
- Track event activity and calendar availability.

Candidates Self-Scheduling enables candidates to:

- Reserve a time slot.
- Reschedule a time slot.
- Cancel a time slot.
- View their upcoming events.

Questions to Consider

Questions	Considerations
How much control do you want to give candidates when self-scheduling?	You can configure: • The number of hours before an event that candidates can reschedule. • A visibility range to limit the range of dates (within the start and end date of the calendar) that a candidate can select when scheduling a time slot. • A minimum number of dates to display to candidates when all time slots within the initial visibility range are filled.
Where do you plan to hold your recruiting events?	If you plan to hold recruiting events at external locations such as hotels or convention centers, you can create off-site recruiting locations and align a self-schedule calendar to the location. You can set a date to inactivate the location when it's no longer needed. You don't need to configure anything for internal locations.
Who's involved in your recruiting events?	You can set up assignable roles and configure an event leader role to give certain workers access to candidate and job application data. You can assign roles to schedules when creating or editing a calendar. Example: You need to give interviewers access to job applications before group interviews.
How do you want to manage recurring recruiting events?	You can configure recurring event schedules for recurring events, such as seasonal group interviews.

Questions	Considerations
	You can also copy schedules to reduce manual effort.

Recommendations

You can view a candidate's self-scheduled calendar events efficiently by configuring a Scheduled Events for Candidate Profile profile group on candidate profiles.

To avoid confusing candidates, add notifications to the *Candidate Self-Schedule* business process to notify candidates of:

- A pending self-schedule task.
- Confirmation of their scheduled event.
- Confirmation of their rescheduled event.
- Confirmation of an event cancellation.

Requirements

External candidates require a Candidate Home account to schedule and manage their time slots for events.

Limitations

- You can't prevent candidates from rescheduling events.
- You can't integrate Candidate Self-Scheduling with any third-party systems such as Microsoft® Outlook, iCal, or Google Calendar.
- Calendars don't detect the candidate's time zone. The time zone associated with the calendar is the time zone that displays to the candidate.

Tenant Setup

No impact.

Security

Domains	Considerations
Manage: Candidate Recruiting Self-Schedule Event in the Recruiting functional area.	Users secured to this domain can schedule, reschedule, and cancel an event on behalf of a candidate.
Manage: Job Requisition Self-Schedule Calendars in the Recruiting functional area.	Users secured to this domain can assign a self-schedule calendar to a job requisition.
Set Up: Recruiting in the Recruiting functional area.	Users secured to this domain can maintain recruiting self-schedule calendar types.
Set Up: Recruiting Self-Schedule Calendar in the Recruiting functional area.	Users secured to this domain can create self-schedule calendars.

Business Processes

You can configure the *Candidate Self-Schedule* business process to enable external or internal candidates to reserve time slots for a calendar event by adding it as a step to business processes.

Reporting

Reports	Considerations
All Recruiting Self-Schedule Calendars	Use to view all recruiting self-schedule calendars.
My Recruiting Self-Schedule Event Roster	Use to view your event roster and manage events on behalf of candidates.
Recruiting Self-Schedule Calendar Availability	Use to view available and reserved time slots for 1 or more recruiting self-schedule calendars. This report returns a maximum of 1000 available dates regardless of the selected start and end dates.
Recruiting Self-Schedule Event Roster	Use to view recruiting events and manage events on behalf of candidates.
Self-Scheduled Events	Configure this report on the Schedule Events profile group to view scheduled events and awaiting actions.

Integrations

Web Services	Considerations
Recruiting Self-Schedule Calendar Types	Use to create and edit calendar types.
Recruiting Self-Schedule Calendars	Use to create a new calendar.
Assign Recruiting Self-Schedule Calendars	Use to assign 1 or more calendars to an evergreen or job requisition.

Connections and Touchpoints

Features	Considerations
Assignable Roles	You can set up assignable roles and assign them to calendar schedules to give workers access to candidate information.
Candidate Profile	You can add the Scheduled Events profile group to the Candidate Profile to display the candidate's events on their profile.
Locations	You can create off-site recruiting locations for events at external locations.
Requisitions	You can assign 1 or more calendars to an evergreen or job requisition.

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: Roles, Time Zones, and Snapshots

Concept: Locations and Location Hierarchies

Reference

Workday 32 What's New Post: Internal Candidate Self-Scheduling

Steps: Set Up Candidate Self-Scheduling

Prerequisites

Review setup considerations for Candidate Self-Scheduling. See Setup Considerations: Candidate Self-Scheduling.

Context

Candidate Self-Scheduling enables you to:

- Create predefined calendars for recruiting events, such as mass interviews or orientations, at any stage in the recruiting process.
- Schedule, reschedule, and cancel events on behalf of a candidate.
- Send tasks to external candidates through Candidate Home so they can schedule themselves for an event.
- Send tasks to internal candidate through My Tasks.
- Track event activity and calendar availability.

Candidate Self-Scheduling enables candidates to reserve, reschedule, view, and cancel time slots for events.

Steps

1. Edit Domain Security Policies.

   Configure these security domains in the Recruiting functional area:

   - *Manage Candidate Recruiting Self-Schedule Event*
   - *Manage Job Requisition Recruiting Self-Schedule Calendars*
   - *Manage: Recruiting Self-Schedule Events*
   - *Self-Service: My Scheduled Recruiting Events*
   - *Set Up: Recruiting*
   - *Set Up: Recruiting Self-Schedule Calendar*
2. Configure the *Candidate Self-Schedule Event* business process.

   See Steps: Configure the Candidate Self-Schedule Event Business Process on page 298.
3. Set Up Assignable Roles.

   Configure the Workday delivered Self-Schedule Event Leader role to give access to workers who might not normally be able to view specific candidate information. This role can be assigned to calendar schedules by those security groups listed in Assigned by Security Groups on the Maintain Assignable Roles task.
4. Steps: Set Up Profiles and Profile Groups.

   Add the:

   - Scheduled Events profile group to the Candidate Profile.
   - Self-Scheduled Events report to the Scheduled Events profile group. This report contains a section for Awaiting Actions and another for Scheduled.
5. Access the Create Off-Site Recruiting Location task.

   Create *Off-Site Recruiting* locations if you have events that are held at external locations such as hotels or convention centers. This task behaves the same as the Create Location task except that *Off-Site Recruiting* is automatically assigned as the Location Usage. You can set a date on which the location is no longer valid.

   See Create Locations.

6. Access the Maintain Recruiting Self-Schedule Calendar Types task.

   Create calendar types, such as *Group Interview*, *Orientations*, or *On-site Assessments*, and associate it with a recruiting stage. You can have more than 1 calendar type mapped to the same recruiting stage.

   Also define the messages candidates see when they access the self-scheduling task on Candidate Home.
7. Access the Create Recruiting Self-Schedule Calendar task to create a new calendar.

   Candidate Visibility Range limits the range of dates (within the start and end date of the calendar) that a candidate can select when scheduling a time slot.

   Example: On January 5, a candidate goes to schedule a time slot. The calendar schedule has start and end dates of January 1 - January 31. The visibility range is 2 days and 10 days. Workday uses the date that the candidate initiated the scheduling and adds the number of days of the visibility range to it. The candidate can select from time slots available on January 7 through January 15.
8. Access the Assign Recruiting Self-Schedule Calendars task.

   You can assign more than 1 calendar to an evergreen or job requisition. Example: Job requisition (JR-10026) can have:

Calendar	With Calendar Type	Mapped to
Assessment Calendar	Skills Test	Assessment Stage
Interview Calendar	Interview	Interview Stage
Orientation Calendar	Orientation	Ready for Hire

Result

When you move a candidate to a stage that has the *Candidate Self-Schedule Event* action step, Workday:

- Creates a *Candidate Self-Schedule Event*.
- Sends a task to the:
  - Registered Candidate Home account of the candidate.
  - Internal candidate's My Tasks.

Next Steps

Manage candidate self-schedule events.

Related Information
Concepts
Setup Considerations: Candidate Self-Scheduling on page 292

Steps: Manage Candidate Self-Schedule Events

Prerequisites

Set up candidate self-scheduling.

Move candidates to a stage that has the *Candidate Self-Schedule Event* action step.

Steps

1. Schedule, reschedule, and cancel time-slots on behalf of a candidate.

   Use the Awaiting Action or Scheduled tabs on the candidate profile to manage time-slots on behalf of the candidate.

2. Use these reports to manage calendars and events:

   For calendars:

   - All Recruiting Self-Schedule Calendars
   - Delete Recruiting Self-Schedule Calendars
   - Edit Recruiting Self-Schedule Calendars

   For events:

   - My Recruiting Self-Schedule Event Roster
   - Recruiting Self-Schedule Calendar Availability
   - Recruiting Self-Schedule Event Roster

Steps: Configure the Candidate Self-Schedule Event Business Process

Context

Configure the *Candidate Self-Schedule Event* business process to enable external or internal candidates to reserve time-slots for a calendar event.

Steps

1. Create a default definition for the *Candidate Self-Schedule Event* business process type.
   a) Access the Create Business Process Definition (Default Definition) task.

      Workday recommends that you only include the initiation step in the business process definition.
   b) Select Business Process Policy > Edit from the Actions menu on the *Candidate Self-Schedule Event* business process.

      Workday recommends that you add *Candidate As Self* on the initiating action. Add *Employee As Self* to View All or View Completed, if you want employees to see a confirmation message when they've self-scheduled for an event.
   c) Select Business Process > Add Notification from the Actions menu on the *Candidate Self-Schedule Event* business process.

      As you complete this task, consider these types of notifications:

If you want an email sent to the candidate to confirm that they've:	Then:
A Schedule Your Event task on Candidate Home when candidate doesn't have a Candidate Home account.	Trigger(s) = On Entry for Initiation
A Schedule Your Event task on Candidate Home when candidate has a Candidate Home account.	Trigger(s) = On Entry for Initiation
Scheduled a time slot.	Trigger(s) = Trigger on Status for *Completed*
Rescheduled a time slot.	Trigger(s) = Trigger on Status for *Corrected*
Canceled a time slot.	Trigger(s) = Trigger on Status for *Rescinded*
   d) Activate Pending Security Policy Changes.
2. Add *Candidate Self-Schedule Event* as an action step to 1 or more of these business processes.

Business Process	Where to add
Assess Candidate	Before *Make Decision* step.

Business Process	Where to add
Background Check	Before any *Review* or *Approval* steps and before *Make Decision* step.
Employment Agreement	Before any *Review* or *Approval* steps and before *Make Decision* step.
Interview	Before *Make Decision* step
Offer	Before any *Review* or *Approval* steps and before *Make Decision* step.
Ready to Hire	Before or after *Completion* step.
Reference Check	Before *Make Decision* step
Review Candidate	Before any *Review* or *Approval* steps and before *Make Decision* step.
Screen	Before *Make Decision* step.

See Steps: Configure Business Process Definitions.

Duplicate Candidate Merging

Setup Considerations: Duplicate Candidate Merging

You can use this topic to make configuration decisions for duplicate candidate merging. It explains:

- Why to set it up.
- How this feature 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

With Workday Recruiting match and merge functionality, you can identify potential duplicate candidates and merge a candidate to a:

- Contingent worker.
- Candidate.
- Pre-hire.
- Previous worker.

Business Benefits

- Improved Data Accuracy and Integrity
    - Eliminates redundancy, ensures a single, complete candidate record.
    - Prevents conflicts, consolidates history, contact information, and application data.
- Increased Recruiter Efficiency
    - Saves time, reduces effort spent managing duplicate profiles.
    - Simplifies hiring decisions especially with high volume hiring
    - Centralized candidate history improves visibility.

- Enhanced Candidate Experience
    - Prevents duplicate outreach for the same role.
    - Reflects a well-managed and respectful hiring process.
- Better Recruiting Analytics and Metrics
    - Accurate source tracking.
    - Improved pipeline metrics, better visibility into time-to-hire and conversion.
- Stronger Compliance and Data Governance
    - Supports GDPR compliance, avoids unnecessary data duplication.
    - Maintains audit trails, tracks changes for transparency and accountability.

Use Cases

You can use duplicate candidate merging to:

- Identify candidates who apply for jobs multiple times through external career sites using different emails or resumes.
- Identify rehires or seasonal workers by asking if they've worked with the company before.
- Merge confidential candidates or candidates with confidential job applications to other candidates, contingent workers, or former workers.
- Link applicants who are also current employees, contingent workers, or former workers under a single profile.
- Merge profiles created through referrals with those already in the system to maintain one source of truth.
- Consolidate records from job fairs, campus events, or sourcing campaigns where candidates might register multiple times.
- Combine profiles when different recruiting agencies submit the same candidate.
- Prevent confusion during hiring and onboarding by ensuring the candidate's history is accurate and complete.

Questions to Consider

Questions	Considerations
How do you want to merge duplicates?	You can merge duplicates manually or automatically. When you enable automatic candidate merging, Workday automatically merges candidates based on specific matching criteria to help you save time. You can merge candidates manually when they don't meet the criteria for automatic candidate merging. Example: Workday doesn't automatically merge candidates if at least 1 of them has a Candidate Home account.
Which types of duplicates do you want to merge?	You can merge candidates to: • Contingent workers • Other candidates • Pre-hires • Previous workers • Terminated workers

Questions	Considerations
	Workday identifies duplicate pre-hires when they're eligible for hire and share the same country. You can merge candidates who apply through an external career site with their active contingent worker profile. Workday enables you to merge confidential candidates or candidates with confidential job applications to: • Contingent workers • Former workers • Other candidates • Terminated workers
When do you want to identify and manage duplicates?	You can add the duplicate candidate merging as a required step at any stage of the recruiting process. When you include previous worker questions on your external career site, external candidates can identify themselves as previous workers. You can display responses to previous worker questions on the candidate grid to make recruiters aware of potential duplicates early in the recruiting process. You can configure Workday to prevent a referral when: • The candidate applied for the job requisition previously. • There's a duplicate prospect for the same job requisition or job area. • The person already exists anywhere in Workday. You can configure Workday to notify recruiters of potential duplicate agency candidates for review.

Recommendations

To avoid duplicate candidates, enable candidates to identify themselves as previous workers.

Requirements

No impact.

Limitations

You can't:

- Automatically merge 2 candidates when at least 1 of them has a registered Candidate Home account.
- Merge external candidates with active internal employees.
- Merge a candidate to a worker who has an in-progress event. Example: Personal information change or future-dated *Hire* event.

- Merge records when the source record has an in-progress event. Example: You can't merge a pre-hire with an in-progress *Hire* event to a previous worker.
- Unmerge records that have an in-progress or completed *Hire* event.

Tenant Setup

You can enable automatic candidate merging on the Edit Tenant Setup - Recruiting task.

Security

Domains	Considerations
Candidate Merge domain in the Recruiting functional area.	Users secured to this domain with *View and Modify* access can view and merge potential duplicate candidates. Users with *View* access can't take action on duplicates.
Former Worker Storage domain in the Staffing functional area.	Users secured to this domain can access information on former workers.

Business Processes

You can add:

- Duplicate candidate merging as a *To Do* step on the *Job Application* business process.
- Condition rules to *To Do* steps to review responses to previous worker questions and send a task to recruiters to review and manually merge duplicates.

Reporting

Reports	Considerations
Find Duplicates for Candidate	Use this report to view and manually merge or link duplicate records.
Merged Candidates	Use this report to review merged and unmerged records.

Integrations

You can use the *Put Candidate* web service to load a small number of candidates. When you enable automatic candidate merging, Workday searches for duplicates created with the *Put Candidate* web service. For loading a large number of candidates, we recommend you use the *Bulk Import Put Candidate* web service. The *Bulk Import Put Candidate* web service offers much more efficient loading. When you use the *Bulk Import Put Candidate* web service, automatic candidate merging will not occur even if it is enabled. You can use the Find Duplicates for Candidate report to identify duplicate candidates and merge them manually.

Connections and Touchpoints

Duplicate candidate merging interacts with these parts of Workday:

Features	Description
Cash	When merging, Workday takes this pre-hire data into account: • Ad hoc payment status. • Ad hoc payment template status.

Features	Description
Expenses	When merging, Workday takes this expenses data on candidate and pre-hire records into account: • Credit card transactions. • Expense item attributes. • Expense payees. • Expense payments. • Expense reports. • Mobile expenses. • Spend authorizations. • Ticket details.
Learning	When merging, Learning takes this pre-hire data into account: • Contact person for a course offering. • Learning history. • Learning paths. • Topics.
Settlements	When merging, Workday takes this payment data on pre-hire records into account: • Ad hoc payments. • Expense payments.
Student	The Match and Merge process suggests potential duplicates for merging.
Talent	When merging, Talent takes this pre-hire data into account: • Awards and activities. • Certifications. • Competencies. • Education. • Internal projects. • Job history. • Languages. • Professional affiliations. • Skills. • Training. • Work experience.

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: Manual Candidate Merging on page 306

Concept: Automatic Candidate Merging on page 309

Tasks

Identify Duplicate Recruiting Agency Candidates on page 429

Merge Duplicate Candidates

Prerequisites

- You can enable candidate merging using the Enable Candidate to Person Merging task.
- Security:
  - *Candidate: Global Search* and *Candidate Merge* domains in the Recruiting functional area.
  - *Exit Interview* and *Former Worker Storage* domains in the Staffing functional area.

Context

Workday Recruiting Match and Merge automatically identifies potential duplicate records for a candidate and enables you to:

- Manually merge a candidate to another candidate, pre-hire, former worker, or contingent worker.
- Unmerge records.

You can merge duplicate External Candidates or Pre-Hires, but not with Internal Candidates or Workers.

Merge events have a:

- Source (the candidate that you want to merge).
- Target (the worker or candidate with whom you want to merge the Source).

The Source is the candidate:

- That applied to a job on the external career site.
- Created by the *Put Candidate* web service.
- From whose profile you initiate the merge on the Duplicates tab.
- Whose name you enter in the Find Duplicates for Candidate report.

Note: You can now opt in to the new Duplicate Management Framework. After you opt in, you can't opt out and won't be able to access the Workday Recruiting Match and Merge functionality. For more information, see:

- Duplicate Candidate Merging/Duplicate Management Framework Feature Comparison
- Steps: Set Up the Duplicate Management Framework for Recruiting on page 312

Steps

1. Access the Edit External Career Site task.

   Complete the Apply - Previous Worker section to check whether external candidates previously worked at your company. Workday uses candidate answers to flag potential duplicates.
2. (Optional) Access the Edit Tenant Setup - Notifications task.

   Configure Workday to send a notification to the email address associated with a deactivated Candidate Home account.

   a) In the Notification Delivery Settings section, access the Recruiting parent notification type.
   b) Configure the Candidate Home Account Deactivated notification category.

   See Reference: Edit Tenant Setup - Notifications.
3. Access the Find Duplicates for Candidate report.
4. Select a candidate and click OK to advance to the list of potential duplicates for that candidate.

5. Select an action on the Merge column:
    - Merge: Merges the candidate to the selected record.

   Clicking Remove prevents that record from displaying as a duplicate for the candidate in future searches.

   If you merge a candidate to a former worker, Workday uses the former worker information when you hire the candidate. This type of merge might trigger data updates on the former worker record. All processes triggered by the merge have (Merge) appended to the process name.

   Before merging a person record, close all other browser tabs, windows, and mobile instances where that record is open.
6. If you want to merge the candidate with a person not shown on the Potential Duplicates grid, click Merge with Other.

   Search for a person with whom you want to merge the candidate. The Last Name that you enter must fully match the person's last name.

   Example: If you want to search for a terminated worker named Ava Coulson-Greene, enter *Coulson-Greene* in the Last Name field.

Result

Workday automatically sets these types of records as the Target when you merge them with a candidate:

- Candidates with a Candidate Home account, except when you merge 2 candidates with different accounts.
- Contingent workers.
- Terminated workers.

When you merge a candidate with a terminated worker, Workday:

- Automatically sets the terminated worker as the Target.
- Updates the terminated worker profile with candidate information, including the:
    - Contact information.
    - Legal name.
- Marks the merged record as a former worker on the job application.

When you merge a:

- Candidate who has a Candidate Home account with a contingent or terminated worker, Workday automatically sets the worker as the merge Target. You can't select any of these record types as a Source for merging.
- Prospect created through Prospect Introduce Yourself with another prospect, Workday displays Terms and Conditions from the merge Target and not the merge Source in the merged record. Terms and Conditions for the Source are still available in audit reports.

When a prospect applies on an external career site that requires a Candidate Home account, Workday creates a candidate record independent of the prospect record. The 2 records don't merge automatically.

When you merge candidate records, the Candidate Confirmed Opt-In Email status is based on the primary email of the candidate not the profile of the candidate. The Candidate Confirmed Opt-In Email status is based on the most recent or updated primary email address.

When you merge a candidate with a worker and the candidate has a pendingReview Documents task, Workday removes the pendingReview Documentstask if you’re usinge-Sign by Adobe Sign as theeSignature Integration Type. Workday recommends that after such a merge, you use theReview Documents task to add this step.

Next Steps

Review merged records on the:

- Candidate profile.
- Merged Candidates report.

You can use these report fields to identify and report on merge targets and the former or terminated worker that a candidate was merged to:

- Candidate is Merge Target
- Merged Former Worker
- Merged Terminated Worker

To restore a merged record to its original state, click the Unmerge button on the Merged Candidates report. All actions you take on the merged record, such as creating a job application, transfer to the target record of the original merge. You can't unmerge records when:

- There's an in-progress or completed *Hire* event.
- The source record is purged.

Related Information
Tasks
Create External Career Sites on page 379
Steps: Set Up Duplicate Management

Concept: Manual Candidate Merging

You can view and manually merge potential duplicate records on the:

- Find Duplicates for Candidate report.
- Duplicates tab on the Overview profile group of the candidate profile.

Possible Actions on Duplicate Records

Workday enables you to take action on duplicate records, depending on the source and target of the merge event. On the grid below:

- The top row lists potential merge targets.
- The first column lists potential merge sources.

	Prospect	Candidate without Candidate Home Account	Candidate with Candidate Home Account	Pre-Hire with Candidate	Pre-Hire	Terminated Worker	Former Worker	Active Contingent Worker	Pre-Hire with Initiated or Future-Dated Hire	Active Worker
Prospect	Merge	Merge	Merge	Merge	Merge	Merge	Merge	Merge	N/A	N/A
Candidate without Candidate Home Account	Merge	Merge	Merge	Merge	Merge	Merge	Merge	Merge	N/A	N/A
Candidate with Candidate Home Account	Merge - Candidate Home account moves	Merge - Candidate Home account moves	Merge - Latest updated primary email address	Merge	Merge	Merge	Merge	Merge	N/A	N/A

	Prospect	Candidate without Candidate Home Account	Candidate with Candidate Home Account	Pre-Hire with Candidate	Pre-Hire	Terminated Worker	Former Worker	Active Contingent Worker	Pre-Hire with Initiated or Future-Dated Hire	Active Worker
	to target	to target	becomes Candidate Home account username							
Candidate with Pre-Hire and Without Hire Events	Merge	Merge	Merge	Merge	Merge	Merge	Merge	Merge	N/A	N/A
Candidate with Pre-Hire and Initiated Hire Event	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

You can't merge a candidate to a worker who has an in-progress event, such as a personal information change or future-dated hire event.

You can't merge 2 candidates if at least 1 candidate's *Job Application* event is complete.

If you unmerge 2 candidates who previously had different Candidate Home accounts, Workday restores both accounts. You can't unmerge candidates out of order. Example: If you merge 2 candidates, then merge the record with a third candidate, you must undo the second merge before you undo the first.

When you merge a prospect created through Prospect Introduce Yourself with another prospect, Workday displays Terms and Conditions for the merge Target and not the merge Source. Terms and Conditions for the Source are available in audit reports.

Duplicate Record Identification

Workday compares this information on both records to find and display potential duplicates for a candidate:

Type	Description
Candidate name	At least one of these combinations must be an exact match: • First letter of the First Name and full Last Name. • Full First Name and Last Name.

Type	Description
Contact information	The Phone Number or Email must be an exact match. Only available for candidate-to-candidate matching. Workday doesn't match phone numbers if the formatting differs. Example: 555-1234 doesn't match with 5551234.
Date of birth	Must be an exact match.
National ID	You can merge records with national IDs that have different expiration or issue dates when the national ID type and ID are the same. You can't merge 2 records that have different values for the same type of national ID. If both the source and target records have national IDs of the same type, either: • All of the source's national IDs of that type must be contained within the target's IDs of the same type, or • All of the target's national IDs of the same type must be contained within the source's IDs of the same type. Example: You can merge 2 records if the source and target share the same SSN (Social Security Number) and the source has an additional SSN. However, you can't merge the records if they share the same SSN, but both of them have additional, different SSNs. Workday doesn't compare government IDs when identifying duplicate candidates.
Previous worker questions	If you enable previous worker questions on the Edit External Career Site task, Workday compares existing worker data with these candidate answers: • Previous work email. • Employee ID. If at least one of these answers matches with a former or terminated worker, Workday also compares their data with these candidate answers for increased accuracy: • Manager name. • Work location.
Social media	At least 1 of these fields must be an exact match: • LinkedIn URL • X User Name • Facebook URL • Google+ URL

Concept: Automatic Candidate Merging

When you enable automatic candidate merging on the Edit Tenant Setup - Recruiting task, Workday:

- Searches for duplicates for a candidate who applies to a job on an external career site.
- Automatically merges the candidate with any duplicates.

Workday checks for duplicates within these candidate populations:

- External candidates.
- Candidates created from the Create Job Application related action off a prospect.
- Prospects and candidates created with the *Put Candidate* web service.

Workday automatically merges 2 candidates when their First Name and Last Name are exact matches and at least 1 of these fields is an exact match:

- Phone Number
- Email Address
- LinkedIn URL
- X User Name
- Facebook URL
- Google+ URL

Example: Recruiter A submits a candidate with all details, and later, Recruiter B submits the same candidate with the same details but omits their LinkedIn profile. Workday identifies the shared candidate information and consolidates the candidate profile as one.

Workday doesn't automatically merge 2 candidates if at least 1 of them has a registered Candidate Home account.

You can merge duplicate External Candidates or Pre-Hires, but not with Internal Candidates or Workers.

Concept: Confidential Candidate Merging

Workday enables you to merge confidential candidates or candidates with confidential job applications to:

- Other candidates.
- Contingent workers.
- Former workers.

If you have access to view them, confidential candidates display on the:

- Duplicates tab on the candidate profile.
- Find Duplicates for Candidate report.

The prospect on the merged record has the same confidential or nonconfidential status as the target person. If the target person has no prospect, the merged prospect has the same confidential or nonconfidential status as the source candidate's prospect.

Individual job applications retain their confidential or nonconfidential status. If you unmerge, prospects and job applications revert to their original confidential or nonconfidential status. Confidential and nonconfidential prospects can have confidential job applications.

Example of merging confidential candidates to other candidates:

Source Prospect	Source Job Application	Target Prospect	Target Job Application	Merged Record Information
Confidential	Job application 1 (confidential)	Nonconfidential	Job application 2 (nonconfidential)	• Nonconfidential prospect. • Job application

Source Prospect	Source Job Application	Target Prospect	Target Job Application	Merged Record Information
				1 (confidential). • Job application 2 (nonconfidential).
Confidential	Job application 1 (nonconfidential)	Nonconfidential	Job application 2 (nonconfidential)	• Nonconfidential prospect. • Job applications 1 and 2 (nonconfidential).
Nonconfidential	Job application 1 (nonconfidential)	Confidential	Job application 2 (confidential)	• Confidential prospect. • Job application 1 (nonconfidential). • Job application 2 (confidential).
Nonconfidential	Job application 1 (confidential)	Confidential	Job application 2 (confidential)	• Confidential prospect. • Job applications 1 and 2 (confidential).
Confidential	Job application 1 (nonconfidential)	No prospect	Job application 2 (nonconfidential)	• Confidential prospect. • Job applications 1 and 2 (nonconfidential).

Example of merging confidential candidates or candidates with confidential job applications to former or contingent workers:

Source	Target Former or Contingent Worker	Merged Record Information
Confidential prospect	No prospect	Confidential prospect
Confidential job application	No job application	Confidential job application
Confidential prospect	Confidential prospect	Confidential prospect
Confidential job application	Confidential job application	Confidential job application
Confidential prospect	Nonconfidential job application	• Nonconfidential prospect • Nonconfidential job application

Source	Target Former or Contingent Worker	Merged Record Information
Confidential job application	Nonconfidential job application	• Nonconfidential candidate • Nonconfidential job application • Confidential candidate • Confidential job application
Confidential prospect	Nonconfidential prospect	Nonconfidential prospect
Confidential job application	Nonconfidential prospect	• Confidential candidate • Confidential job application

Related Information

Concepts

Concept: Confidential Job Requisitions, Prospects, and Candidates on page 231

Troubleshooting: Candidate List Grid and Candidate Custom Report Performance

To find duplicate candidates, you can use a calculated field in a business process condition on a job application. Example: Create a calculated field and add a condition to the *Review* business process that notifies the primary recruiter of duplicate candidates.

Users report performance issues on the candidate list grid.

Cause: The candidate list grid uses invalid calculated fields.

Solution:

Steps

Security: *Set Up: Recruiting* domain in the Recruiting functional area

1. Access the Candidate List Assignment task.
2. Open the default grid in a new tab.
3. Remove these invalid calculated fields:
    - Duplicate Candidates
    - Duplicates Found

Users report performance issues on candidate custom reports.

Cause: The custom reports use invalid calculated fields.

Solution:

Steps

Security: These domains in the System functional area:

- *Custom Report Creation*
- *Manage: All Custom Reports*

1. Search Workday for these invalid calculated fields using the field: search prefix.
    - Duplicate Candidates
    - Duplicates Found
2. Select the calculated field from the search results.

3. In the Closely Related Indexed CRF section, select the field from the Object Details column of the Where Used grid.
4. Select the Where Used tab to view the usage count and custom reports containing the calculated field.
5. Access each custom report listed in the Object Details column and remove the calculated field.

Related Information
Concepts
Setup Considerations: Calculated Fields
Concept: Calculated Fields

Duplicate Management Framework for Recruiting

Steps: Set Up the Duplicate Management Framework for Recruiting

Prerequisites

Review setup considerations for the Duplicate Management.

Access the Maintain Functional Areas task to enable the Duplicate Management functional area.

Security: These domains in the Duplicate Management functional area:

- *Set Up: Duplicate Management*
- *Manage: Duplicate Records for a Person*
- *Manage: Duplicate Records for the Tenant*

Context

Workday Recruiting supports the Duplicate Management Framework, enabling you to find, merge, and unmerge duplicate candidates and prospects in Workday.

Steps

1. Steps: Set Up Duplicate Management.
2. (Optional) Configure profile groups.

   Access the Configure Profile Group task to add the Duplicates worklet to these profile groups:

   - Duplicates for Candidate Profile
   - Duplicates for Prospect Profile
   - Overview for Candidate Profile
   - Overview for Prospect Profile
3. (Optional) Configure the *Duplicate Check* or *Review* step on the *Agency* business process.

   Workday displays an Identified Potential Duplicates grid in My Tasks for you to review potential duplicates for the agency candidates you submitted based on your configured match rules.
4. (Optional) Configure a Duplicates card on the Summary tab of candidate and prospect profiles.

   The Duplicates card displays up to 5 potential duplicates on the candidate or prospect profile. To configure the card:

   a. Access the Configure Profile Summary task.
   b. Select Candidate Profile or Prospect Profile.
   c. Add the Duplicates Overview card.

   The Duplicates card doesn't currently support masked profiles.

Result

Workday ensures that the referrals policy that you configure on the Edit Tenant Setup – Recruiting task persists when you opt in to the Duplicate Management Framework. The framework identifies duplicates based on your configured duplicate referrals policy and match rules.

Workday flags any potential duplicates for referrals when you use these tasks:

- Create a Referral Exception
- Refer a Candidate

The Refer a Candidate task initiates the *Refer a Candidate* business process and displays a grid listing potential duplicates on the Review Refer a Candidate page.

When creating a new prospect, Workday checks the New Prospect Details that you enter or the curriculum vitae/resumé you upload for potential duplicates. Workday displays a list of potential duplicates for you to review, enabling you to continue working with an existing record if you find an exact match.

Next Steps

- Find Duplicate Records in the Tenant
- Merge Duplicate Records

Related Information

Concepts

Setup Considerations: Duplicate Merging

Reference

2020R2 What's New Post: Duplicate Management Framework

Duplicate Candidate Merging/Duplicate Management Framework Feature Comparison

2024R2 Bulk Import Put Candidate SOAP Web Service

Reference: Duplicate Management Framework Report Fields for Recruiting

Workday provides these report fields that you can use to identify duplicates in the recruiting process when using the Duplicate Management Framework:

Report Field	Description
Duplicate Candidates Found for the Referral	This field has a value of *Yes* (true) if there are potential duplicate candidates for a referral candidate or job application.
Duplicate Candidates Found for the Same Job Requisition	This field has a value of *Yes* (true)if there are potential duplicate candidates for a referral for the same job requisition.
Duplicates for Candidate	The potential duplicate candidates, pre-hires, workers (employee or contingent), former workers, terminated workers, or retirees for a candidate.
Duplicates for Prospect or Job Application	The potential duplicate candidates, pre-hires, workers (employee or contingent), former workers, terminated workers, or retirees for a job application.
Duplicates for Recruiting Event	The potential duplicate candidates, pre-hires, workers (employee or contingent), former workers, terminated workers, or retirees for a candidate included in a recruiting event.

Report Field	Description
Duplicates Found for Candidate	This field has a value of *Yes* (true) if the candidate has any potential duplicate: • Candidates • Former workers • Pre-hires • Retirees • Workers (employee or contingent) This field excludes confidential candidates. For optimal performance, don't use this field in the Candidate List grid or in calculated fields in custom reports.
Duplicates Found for the Prospect, Referral, and Job Application	This field has a value of *Yes* (true) if the prospect or job application has any potential duplicate: • Candidates • Former workers • Pre-hires • Retirees • Workers (employee or contingent) This field excludes confidential candidates. For optimal performance, don't use this field in the Candidate List grid or in calculated fields in custom reports.
Duplicates Found for Recruiting Event	This field has a value of *Yes* (true) if the recruiting event has any potential duplicate: • Candidates • Former workers • Pre-hires • Retirees • Workers (employee or contingent) This field excludes confidential candidates. For optimal performance, don't use this field in the Candidate List grid or in calculated fields in custom reports.
Duplicates Found for the Job Requisitions (Recruiting Agency Candidate)	This field has a value of *Yes* (true) if any of these person types are potential duplicates of the recruiting agency candidate for the same job requisition: • Candidates • Former workers • Pre-hires • Retirees • Workers (employee or contingent) This field excludes confidential candidates.
Duplicates Found for the Recruiting Agency Candidate	This field has a value of *Yes* (true) if the recruiting agency candidate has any potential duplicate:

Report Field	Description
	• Candidates • Former workers • Pre-hires • Retirees • Workers (employee or contingent) This field excludes confidential candidates.
Duplicates Found with Conflicting Ownership Periods	This field has a value of *Yes* (true) if there are potential duplicate candidates for a recruiting agency candidate under conflicting ownership periods. This excludes confidential candidates.

External Candidate References

Steps: Set Up External Candidate References

Context

You can streamline the recruiting process to collect referees from external candidates during the job application process. Workday sends referees an email that enables them to submit a reference for the external candidate. Referees can decline to send a reference, and Workday enables the recruiter to collect more references using the Manage References task in My Tasks.

Steps

1. Edit Business Processes.

   Enable these Reference Check business process steps as tasks that recruiters can use to manage reference details:

   - *Add References*
   - *Manage References*
   - *Reference Check Decision*
   - (Optional) *Review Add References*

   Security:

   - *Manage: Assign Reference Templates* domain in the Recruiting functional area.
   - *Manage: External References* domain in the Recruiting functional area.
   - *Candidate Data: Reference Check Results* domain in the Recruiting functional area.
   - *Self-Service: External References* domain in the Recruiting functional area.
   - *Set Up: External References* domain in the Recruiting and Talent Pipeline functional areas.
2. Access the Maintain Referee Relationship Types task.

   Create candidate relationship types for referees.

3. Hide or Require Optional Fields.

   Select Add References and configure these fields:

   - Contact me before reaching out to referee
   - Company Name
   - Job Title
   - Phone Number
   - Relationship Type

   You can't optionally configure these fields:

   - Email Address
   - Name
4. Configure Questionnaires and Questions.

   Create a Reference Check type questionnaire.
5. Create Reference Templates on page 317.
6. Access the Maintain Reference Template Rules task.

   Use condition rules to assign reference templates to a specific job requisition. You can view the reference template assigned to a job requisition on the Details tab.
7. (Optional) Access the Assign Reference Template task to change the reference template used on a job requisition.

   Security: *Manage: Assign Reference Templates* domain in the Recruiting functional area.
8. Access Edit Tenant Setup - Notifications task.

   In the Notification Delivery Settings section, select the Business Process tab. As you complete the Custom Business Process Notifications section, select:

   - *Email* for the Channel prompt.
   - *Immediately* for the Default Frequency prompt.

   Security: *Self-Service: External References* domain in the Recruiting functional area.

   See Reference: Edit Tenant Setup - Notifications.
9. Create Custom Notifications

   On the *Reference Check* business process, to notify candidates about the Add References task, select:

   - *Candidate as Self* for Recipients.
   - *On Entry of Add References* for Trigger on Status.

   To notify referees about the reference, select:

   - *Referee as Self* for Recipients.
   - *On Shared Participation Step of Manage References* for Trigger on Status.
10. Create Calculated Fields.

    To collect questionnaire answers, create a Referee (from Reference) calculated field on the *Questionnaire Answers* business object.

    Security: *Candidate Data: Reference Check Results* domain in the Recruiting functional area.

Result

Recruiters can collect references and resend referee links. When recruiters resend referee links:

- Workday resends all notifications associated with the *Manage References* step of the *Reference Check* business process.
- Any step delays don't respect the Step Delay, but Workday does respect the Notification Delay.

When a candidate gets purged, you can also purge their references and associated referees.

Next Steps

Configure the term referee with a custom label.

Related Information
Tasks
Create Custom Labels

Create Reference Templates

Prerequisites

Security: The *Set Up: External References* domain on the Recruiting and Talent Pipeline functional areas.

Context

You can create reference templates to assign to different job requisitions. The reference templates enable you to add questionnaires in the reference.

Steps

1. Access the Create Reference Template task.
2. As you complete this task, consider:

Option	Description
Inactive	Select this check box if you want to use the template in the future. You can also select this check box for an existing template that you no longer want to use.
Minimum	The minimum number of references you'd like to collect for the job requisition.
Maximum	The maximum number of references you'd like to collect for the job requisition.
Help Text to Candidate	Instructions to help guide candidates on which referees they need to submit.
Default Questionnaire	The questionnaire you configured for this type of reference.
Referee Relationship Type	Select the referee relationship types that can submit a reference. Example: • Coworker • Customer • Employee • Friend • Manager • Mentor
Default Questionnaire Override	You can override the default questionnaire and assign different questionnaires for the referee relationship types.

Result

You have a template for the references you want to collect.

Next Steps

Assign the external reference template to the desired job requisition. You can also create more templates to cater to specific job requisitions.

Concept: External Candidate References

Workday supports the collection of external candidate references. Candidates can submit referees directly to Workday without having to go through a third-party vendor using the Add References button on external career sites. Recruiters can then manage those referees from the candidate profile.

Workday enables you to:

- Assign custom reference templates to job requisitions using conditional rules or an override task.
- Create different referee relationship types to collect.
- Create multiple reference templates.
- Create questionnaires for referees to complete and include attachments on the questionnaire.
- Override the default questionnaire and assign different questionnaires for each referee relationship type.
- Purge a candidate, their referees, and their references.
- Report on references after they’re submitted.

Workday sends the referee request though email. The referee can:

- Accept to write this reference.
- Decline to write this reference.
- Decline to write this reference and would like Workday to remove their contact information.

You can use these reports to manage reference checks:

Report	Description
Reference Check Results	Reference check results for job applications with completed reference check events.
Reference Request Status	Referees that haven't submitted a reference for a job application.

Notifications for Candidates

Setup Considerations: Notifications for Candidates

You can use this topic to help make decisions when planning your configuration and the use of notifications for candidates. 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 enables you to create predefined message templates so that recruiters can send email notifications to candidates. You can send recruiting marketing information or notifications about specific jobs.

Business Benefits

By configuring notifications for candidates, you can:

- Give recruiters control and flexibility over the content and timing of their emails to candidates.
- Provide consistent communication between recruiters and candidates by creating message templates.
- Improve the candidate experience by reviewing candidate communication history to reduce the risk of sending duplicate emails.
- Reduce manual effort for recruiters by adding merge fields to message templates.
- Increase efficiency by sending emails to candidates in bulk.

Use Cases

You can use notifications for candidates to:

- Invite 1 or more candidates to apply for a job.
- Decline 1 or more candidates on a job requisition.
- Send follow-up emails to candidates after interviews.
- Notify university prospects of upcoming career events.
- Notify a pool of candidates about new positions.

Questions to Consider

Questions	Considerations
How do you want notify candidates?	You can use Workday Messaging to send SMS notifications to internal or external candidates who have opted in to receive SMS messages. • You can send SMS notifications to active candidates at any stage of the recruiting process. These include candidate reminders, custom business process notifications, and recruiting marketing communications. • You can use Workday Messaging as a custom notification within a business process. This allows you to send messages as part of a workflow. Example: When you close a job requisition, all remaining candidates receive a notification about their disposition. • You can configure email notifications for participants in a candidate conversation to alert them when there's a new SMS message in an active conversation.
What information do you want to communicate to candidates?	You can send 2 types of notifications to candidates during the recruiting process: • Emails to candidates who apply for a specific job. Candidates can't unsubscribe from these emails. • Emails to offer marketing information to candidates that isn't related to a specific job they've applied for. Example: Information about a career event involving your

Questions	Considerations
	organization. You can enable candidates to unsubscribe from these emails.
Who is responsible for sending notifications to candidates?	You can limit certain groups or individuals from: • Creating message templates. • Editing email content. • Sending emails. Example: You can enable recruiting administrators to create message templates and enable recruiters to edit and send emails only.
How do you want to communicate with candidates?	If you need to contact a large number of candidates at once, you can email candidates in bulk. Example: You have a pool of candidates that you didn't hire on a job requisition and you want to invite them to apply to a different job. You can also email candidates individually.
How do you want to communicate with candidates who speak different languages?	You can translate your message templates into different languages so that candidates receive messages in their preferred language.

Recommendations

You can enter or configure a default Reply To email for message templates. If you don't enter a Reply To email, candidate replies go to the email configured for your tenant.

Requirements

- Create a recruiting communications email template to define the appearance and branding of your email. Message templates provide the content of your email.
- Create segment-based security groups so that only authorized users are able to create or edit message templates.

Limitations

- You can't delete message templates once you've created them but you can edit them at any time.
- You can only have 1 active recruiting communications email template at a time.
- You can only send attachments through email.
- Attachments have a size limitation of 7MB.

Tenant Setup

Select the Enable Candidate Fields in Notifications check box on the Edit Tenant Setup – Recruiting task for candidates to view data fields and receive notifications. Configure security access for the *Candidate Notification Receiver* security group.

You can configure settings in the Recruiting section of the Edit Tenant Setup - Notifications task to enable recruiters to send emails to candidates on an ad hoc basis. You can also set up routing rules for notifications to specify how you send notifications.

Security

Domains	Considerations
Set Up: Message Templates in the System functional area.	You can create a segment-based security group that only enables users in the group to create recruiting message templates. Example: You want to enable your recruiting administrator to create message templates and you don't want your Learning administrator to have access.
Candidate Communication in the Recruiting functional area.	Users secured to this domain can send notifications to candidates and prospects using message templates for candidates who have applied for a specific job.
Invite to Apply in the Recruiting functional area.	Users secured to this domain can invite candidates to apply for other job requisitions using message templates for marketing information. To setupInvite to Applywith notification designer template: • Create a Segmented Security Group and include the*Candidate Notification Receiver* as the group and theWorkday Owned Segmentof*Job Application - External*. • Add the *Candidate Notification Receiver* security group to the*Invite to Apply* domain withViewaccess.

Business Processes

You can configure custom notifications that trigger on any business process step or on the status of a business process. You can also add a timed delay to custom workflow notifications on recruiting-related business processes. Example: You want to prevent a candidate from receiving a rejection message immediately after they submit their job application.

Reporting

Reports	Considerations
Candidate Communication	View a record of communications sent to a candidate, including: • Message content • Attachments • Sender • Subject • Timestamp
Candidate Job Applications	Access candidates' job applications and send notifications to candidates.
Find Candidates	Search your entire candidate population and send notifications to candidates.
My Candidates	Search candidates for whom you're the recruiter or manager and send notifications.

Integrations

No impact.

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.

Related Information

Concepts

Concept: Notifications

Steps: Configure Access to Fields in Candidate Notifications on page 322

Setup Considerations: Workday Messaging

Tasks

Steps: Set Up Workday Notifications

Examples

The Next Level: Ad Hoc Communications

Steps: Configure Access to Fields in Candidate Notifications

Context

You can:

- Enable Workday to create notification system accounts for candidates.
- Set up security to determine which fields candidates can view.

Workday only uses notification system accounts to evaluate security. These accounts don't store information about candidates.

Steps

1. Access the Edit Tenant Setup - Recruiting task.

   Select the Enable Candidate Fields in Notifications check box. When you select this check box, Workday initiates a background job to create notification system accounts for all candidates.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.
2. Edit Domain Security Policies.

   Grant View access for the *Candidate Notification Receiver* security group to any of these domains that secure your preferred report fields. Example: For Recruiting the Candidate Data: Interview Schedule domain controls who can view interview schedules.

Functional Area	Domain
Contact Information	• *Person Data: Work Email* • *Person Data: Work Phone*
Pre-Hire Process	• *Pre-Hire Personal Data: Sexual Orientation & Gender Identity* • *Pre-Hire Personal Data: Social Benefits Locality*
Recruiting	• *Candidate Data: Attachments* • *Candidate Data: Bundle Resumes* • *Candidate Data: Interview Schedule* • *Candidate Data: Job Application* • *Candidate Data: Language Skills*

Functional Area	Domain
	• *Candidate Data: LinkedIn Recruiter System Connect* • *Candidate Data: Questionnaires* • *Candidate Data: Reference Check Results* • *Candidate Data: Offer Details* • *Confidential Job Requisitions* • *Job Requisitions for Recruiting* • *Manage: Assign Reference Templates* • *Manage: External References* • *Masked Recruiting Candidates* • *Move Candidate*

Next Steps

To verify that candidates have a notification system account, create a custom report with the Notification System Account report field on the External or Internal Candidate business object.

Related Information
Reference
2021R2 What's New Post: Fields in Candidate Notifications
Reference: Edit Tenant Setup - Recruiting

Steps: Set Up Notifications for Candidates

Context

You can use the Workday notification framework to send notifications at any stage in the recruiting process:

- To active candidates who apply to a specific job. Candidates can't unsubscribe from these emails.
- As informational-only recruiting marketing, unrelated to a job the candidate has applied to. Candidates can unsubscribe from these emails.

In addition to emails, you can also send:

- Mobile push notifications.
- SMS notifications by configuring Workday Messaging.

You can include attachments in emails that you send through the Invite to Apply or Send Message tasks.

The notification framework also enables you to configure message templates for these communications.

Steps

1. Create Segment-Based Security Groups.

   Configure these Workday-delivered security segments for the *Set Up: Message Templates* domain:

   - *Active Candidate Security Segment*
   - *Recruiting Marketing Security Segment*
2. Edit Domain Security Policies.

   Configure the security policies for the *Set Up: Message Templates*domain in the System functional area and these domains in the Recruiting functional area:

   - *Candidate Communication*
   - *Invite to Apply*
3. Activate Pending Security Policy Changes.

4. Access the Edit Tenant Setup - Notifications task.

   In the Notification Delivery Settings section, configure the Active Candidates notification type in the Recruiting tab:

   a. Select the Override Parent Notification Type Settings check box to view the options to configure individual notification settings.
   b. Select a notification routing rule from the Rule prompt, which applies to individual notification types under the parent.

   See Reference: Edit Tenant Setup - Notifications.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
5. Set up Workday Messaging and enable your candidates to opt in to SMS notifications.

   See Steps: Set Up SMS Notifications for Candidates on page 324.
6. Enable Candidates to Unsubscribe from Marketing Notifications on page 327.
7. Access the Create Message Template task.

   To include a report field in the subject and body of an email or in an SMS message or a push notification, click the Insert tag icon and select it.

   Example: To email a candidate about a job posting that they applied to, add the:

   - Job Posting Title field to the Subject text area.
   - Job Posting field to the Body text area.

   Security: *Set Up: Message Templates* domain in the System functional area.
8. Create Email Templates.

   Select *Recruiting Communications* from the Email Template Behavior prompt.

   Example: Create an email template that includes your company name, company logo, and physical address.

Next Steps

Send Recruiting Marketing notifications to candidates using the:

- Candidate Actions > Invite to Apply or Candidate Actions > Send Message related action from a candidate's name.
- Invite to Apply task.
- Invite to Apply or Send Message mass candidate actions on the Candidates tab of a job requisition profile.

Related Information

Concepts

Setup Considerations: Workday Messaging

Tasks

Steps: Set Up Prospects and Candidates on page 245

Steps: Set Up Message Templates

Steps: Set Up SMS Notifications for Candidates

Prerequisites

Review setup considerations for Workday Messaging. See Setup Considerations: Workday Messaging.

Context

Workday Messaging enables you to send SMS notifications to internal or external candidates who opt in to receive them. Candidates can receive these types of notifications through SMS at any stage in the recruiting process:

- Active Candidates
- Candidate Reminders
- Custom Business Process Notifications
- Recruiting Marketing

You can also enable candidates to view dynamic information from report fields that you include in notifications.

Steps

1. Set up Workday Messaging and configure notification settings for your tenant.

   See Steps: Set Up Workday Messaging.
2. (Optional) Enable candidates and prospects to view data from report fields included in ad hoc messages and candidate notifications.

   See Steps: Configure Access to Fields in Candidate Notifications on page 322.
3. From the related actions of the *Recruiting* business process you want to create a custom SMS notification for, select Business Process > Add Notification.

   Complete the SMS Message Content section.
4. Manage SMS Preferences for Candidates on page 325.

   Opt in or opt out of SMS notifications for external candidates and prospects.

Result

- Internal candidates can opt into SMS notifications on their:
  - Contact Information
  - Preferences

Next Steps

- You can encourage existing external candidates to opt in to SMS notifications with a message that includes the Update Contact Information URL report field.
- To identify the candidates who are receiving SMS notifications, you can create a custom report from the Find Candidates report and add the Opted In to SMS report field as a facet filter.

Related Information

Concepts

Setup Considerations: Workday Messaging

Tasks

Create Custom Reports

Reference

2022R2 What's New Post: Workday Messaging as an Innovation Service

Manage SMS Preferences for Candidates

Prerequisites

- Set up Workday Messaging in your production tenant.

- Add the SMS channel to the notification rule for any of these notification types:
    - Active Candidate
    - Candidate Reminders
    - Custom Business Process Notifications
    - Recruiting Marketing
- Security: *Candidate Data: SMS Opt-In/Opt-Out* domain in the Recruiting functional area.

Context

Sending SMS notifications enables you to communicate directly with candidates. You can opt in or opt out of SMS messaging on behalf of external candidates and prospects with Australian, Canadian, UK, and U.S. mobile phone numbers (excluding numbers from America Samoa, U.S. Virgin Islands, and United States Minor Outlying Islands). You can also resend opt-in confirmation texts to remind external candidates and prospects who haven't replied.

Steps

1. Access the Manage SMS Preferences for Candidate task.

   You can also access this task from the Candidate Actions option on the related actions menu of a candidate.
2. As you complete the task, consider:

Option	Description
No Eligible Mobile Phone	Displays candidates without a valid Australian, Canadian, UK, or U.S. mobile phone number and are ineligible for opt-in. You can apply up to 2 criteria to filter the candidate list.
Candidates Eligible for Opt-In	Displays candidates that have at least 1 Australian, Canadian, UK, or U.S. mobile phone number. Select the Opt-In check box for each candidate you want to opt in to receive SMS. Workday sends a confirmation text to the candidates that you opted in to receive SMS messages.
Candidates with Unconfirmed Opt-In	Displays candidates who haven't responded to the opt-in confirmation, including those: • Who opted in through a job application. • For whom a recruiter opted in. When you select the Opt-Out check box, Workday cancels the opt-in process for the candidate.
Candidates Eligible for Opt-Out	Displays candidates who have fully opted in to receive SMS. Select the Opt-Out check box to opt the candidate out of receiving SMS messaging. Candidates won't receive a notification that they've been opted out when you opt out on their behalf.

Enable Candidates to Unsubscribe from Marketing Notifications

Prerequisites

Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

To help you comply with anti-spamming regulations, you can enable internal and external candidates to unsubscribe from the following Recruiting Marketing email notifications:

- Invite to Apply.
- Send Message (excluding messages referencing job applications).

Steps

1. Access the Edit Tenant Setup - Notifications task.
2. In the Email Compliance section, enter content to display in Recruiting Marketing email notifications.
3. In the Notification Delivery Settings section, select the Recruiting parent notification type.
4. From the Rule prompt, select a routing rule that includes *Mute* as an allowed frequency.

   This rule applies to all individual notification types under the parent, unless you select the Override Notification Parent Type Settings check box for an individual notification type.

Result

When internal candidates access the Change Preferences task, they can select the *Mute* frequency for Recruiting Marketing email notifications.

When external candidates receive a Recruiting Marketing email notification, they can click the unsubscribe link you entered in the Email Compliance section.

Related Information

Reference

Reference: Edit Tenant Setup - Notifications

Concept: Confirmed Opt-In for Email Communications

Workday enables you to confirm that prospects and candidates have verified their subscriptions for job alert and recruiting marketing email communications. Confirmed Opt-In (COI) is enabled for:

- Invite to Apply
- Job Alerts
- Prospect Introduce Yourself
- Send Message, when you send a message without a job application.

Email Template

All COI emails use the Confirmed Opt-In Email Standard Email template. The COI template uses Content 1 dynamic content to add Workday-defined content to the COI email. You can customize the content in the template by removing Content 1 and adding text as static content. The COI template requires the Email URL dynamic content. See Concept: Email Templates.

Note:

If you're a Candidate Engagement customer, we recommend updating the Confirmed Opt-In Email standard email template to inform COI recipients that recruiting campaigns and event registration confirmation messages are exempt from COI. See Concept: Recruiting Event Management Messages.

Messages Queued

Workday queues and resends up to 20 of the most recent Job Alert and Recruiting Marketing email communications to recipients with a pending COI request. These message types are queued and resent after recipients opt in to receive recruiting email communications from Workday:

- Job Alerts sent within 2 weeks.
- Invite to Apply messages sent within 4 weeks.
- Send Message, when you send a message without a job application, sent within 3 months.

Testing

You can test the COI email flow using an email redirect restriction, which is set up in the Edit Tenant Setup – Notifications task in the General Notification Restrictions section. Workday redirects the COI request email to the email address that you specify for testing in the Redirect All Notifications to Email Address field. See Reference: Edit Tenant Setup - Notifications.

Tasks and Reports

Name	Domain Security Policy	Description
Manage Confirmed Opt-In Email Preference	*Manage: Email Communication*	Use this task to resend a COI email to an email address.
Manage Confirmed Opt-In Email Preference for Candidate	*Candidate Communication*	Send the COI email to the candidate's home address. You can access this task from the related actions menu for a candidate by selecting Candidate Actions > Manage Confirmed Opt-In Email Preferences for Candidate.
View Confirmed Opt-In Status for Email Communication	*Manage: Email Communication*	Administrators can use this report to view: • Confirmed Opt-In Email Address • Confirmed Opt-In Email Status • Language Selected • Status Date and Time

Prospect and Candidate Profiles

You can configure the Confirmed Opt-In Email Status field using the Configure Profile Header Card task for Prospect Profiles and Candidate Profiles to view the COI status. See Steps: Set Up Prospect and Candidate Profiles. The field displays these statuses:

- *In-Flight*
- *Not Requested*
- *Opted-In*
- *Opted-Out*

View the Recruiting History timeline on prospect and candidates profiles to determine when the COI request email was sent and messages initiated from these tasks:

- Send Message, when you send a message without a job application.
- Invite to Apply

Workday updates the messages when they're sent, delivery is attempted, or if the recipient opted in or opted out of receiving messages. You can see if a message is:

- Not delivered due to COI restrictions (including messages that timeout while queued).
- Pending a COI request.
- Successfully sent.

Related Information

Reference

Recruiting Email Confirmed Opt-in FAQ

Recruiting Email Confirmed Opt-in Configuration

Concept: Templates for Send Message and Invite to Apply

When you use the Send Message or Invite to Apply tasks to communicate with candidates, you can use message and notification templates to customize your recruiting communications.

Message Templates

Use message templates to draft frequently sent messages to candidates because they make it easier to deliver a consistent message. There are several different types of message templates with notification types for recruiting ad hoc communications:

- Active Candidates messages are specifically targeted at individuals who have already submitted an application. These messages keep the candidate informed about the status of their application, next steps in the Recruiting process, or other relevant updates.
- Recruiting Marketing messages are designed to attract potential candidates or leads and encourage them to apply for open jobs. You might send these messages to a wider audience of leads and potential candidates, and might include information about the company or links to a specific job posting.

You can send these ad hoc communications through the Send Message or Invite to Apply tasks, where you can select an existing message template tied to either type. The location of these tasks determines which type of notification that you can use:

Location	Active Candidate	Recruiting(ment?) Marketing
Job Requisition Candidate List Grid	✓	
Job Applications Candidate List Grid (Recruiting Hub)	✓	
Candidate Pools		✓
Embedded Fetch		✓
Find Candidates report		✓
My Candidates report		✓
Related Actions of the Candidate or Prospect Profile		✓

The Send Message and Invite to Apply tasks each have their own use cases and requirements. Workday recommends that you use custom message templates to invite fetched candidates to apply.

Notification Templates

You can use the Notification Designer to create notification templates. With these templates, you can enable users to add rich branding to custom business process notifications and message templates.

Notification templates add branding to the message content provided by message templates. They are complementary and work together. Administrators can create multiple notification templates for each type of notification, and can be used as an alternative to email templates.

Invite to Apply

You can send message templates configured with the Recruiting Marketing notification type using the Invite to Apply task. Use these templates to invite candidates to apply to a job requisition. Invite to Apply messages require a Job Posting selection because the standard job posting URL fields depend on the posting details.

Workday recommends that you use separate message templates for your External and Internal Invite to Apply messages, as these might require different fields.

Note: When using Notification Designer, avoid duplicated links if Invite to Apply or Job Alerts are enabled, by configuring the job posting links in the notification template and not in the message template.

Example: Invite to Apply

```
Message Template: Invite to Apply - External
Subject: Exciting Opportunity for You at XYZ Corporation!

Body:
Hi [Candidate Name],
Thank you for your previous interest in [Company]!

We have a new position open that we think you would be a great match for
 based on your experience and qualifications:

Title: [Job Posting Title]
Job ID: [Job Requisition ID]

If you are interested in the opportunity, please apply directly:
[Invite to Apply - External Posting URL]

We look forward to hearing from you soon!

Best Wishes,

[Primary Recruiter]
[Company] Talent Acquisition
```

Send Message

Use the Send Message task to send message templates configured with the Active Candidates or Recruiting Marketing type. The context and origin of the message play a big role in the behavior of the template and its included fields:

- You can use Recruiting Marketing message templates when you access the Send Message task from the Find Candidates and My Candidates reports, Embedded Fetch, Candidate Pools, and related actions of the Prospect Profile because you access the task outside of a specific candidate job application.
- You can use Active Candidates message templates when you access the Send Message task from the Job Requisition Candidate List Grid, Job Applications Candidate List Grid, and the related actions of the Candidate Profile because you access the task in the context of a candidate’s submitted job application.

The Send Message task doesn’t require a Job Posting selection, which means most Invite to Apply report fields don’t work with the task because they require a job posting context.

Example: Send Message

```
Message Template: Candidate Interview Availability
Subject: Interview Request from XYZ Corporation!
Body:
Hi [Candidate Name],

I hope you're doing well! We’d love to schedule an interview with you
 for the [Job Posting Title] role at [Company]. Could you share your
 availability for the next few days?

Let me know what works best, and we’ll coordinate accordingly. Looking
 forward to speaking with you!
```

Custom Message Templates

You can create customer message templates. Example: candidate reminder message.

Example: Candidate Reminder

```
Notification Type: Candidate Reminder
Message Template: Reminder of Your Interview with XYZ Corporation
Subject: Future Opportunities with XYZ Corporation
Body:
Hi [Candidate Name],

This is a friendly reminder that you have an interview with [Company] for
 the role of [Job Posting Title] and [Date of Earliest Scheduled Interview
 in Minute Precision]. If you have any questions or concerns, kindly reach
 out to your recruiter.

We look forward to meeting you!

Best Regards,
[Company] Talent Acquisition
```

Tenant Setup

The Edit Tenant Setup - Notifications task manages the frequency and channel of message templates and notifications.

Customize Recruiting notification settings on the Recruiting tab of Notification Delivery Settings. Workday recommends that you:

1. Disable Candidate Home Deactivated.
2. Set all other Recruiting Notification Delivery settings to Immediately.

Customize the settings for business process notifications across the tenant from the Business Processes tab of Notification Delivery Settings. Workday recommends that you set them to *Immediately*. This controls notifications from business processes, including job application notifications.

Confirmed Opt-In and Embedded Fetch?

Embedded Fetch uses Recruiting Marketing notification types for the Send Message and Invite to Apply tasks, which always use Recruiting Marketing notification types.

Confirmed Opt-In (COI) is required. Leads must opt-in before they can receive or respond to an Invite to Apply or ad hoc message.

Other Content to Add

Related Links:

- Steps: Set Up Message Templates
- Create and Activate Notification Templates
- Concept: Confirmed Opt-In for Email Communications
- Recruiting Email Confirmed Opt-in FAQ

Related Information

Tasks

Steps: Set Up Message Templates

Reference

Reference: Edit Tenant Setup - Notifications

Reference: Report Fields for Candidate Messages

Supported Report Fields

This table lists the report fields available for Message templates, by location in Workday.

Location	Send Message Report Fields - No Posting (Business Object)	Invite to Apply Report Fields (Business Object)
Find Candidates Report My Candidates Report Related Actions on the Prospect Profile View Candidate Pools Report		• External URL (Job Posting Anchor): Works for non-candidates • Invite to Apply - External Posting URLs (Candidate Communication) • Job Requisition ID (Job Posting Anchor) • Primary Location (Job Posting Anchor)
Embedded Fetch Tab on the Job Requisition.		• Invite to Apply - External Posting URLs (Candidate Communication) • Job Requisition ID (Job Posting Anchor) • Primary Location(Job Posting Anchor)
Job Application Candidate List Grid Job Requisition Candidate List Grid	• Internal Posting URL (Job Requisition) • Job Posting Title (Job Applications, Prospects, and Referrals)	• Invite to Apply - External Posting URLs (Candidate Communication) • Internal Posting URL (Job Requisition) • External URL (Job Posting Anchor) • Job Requisition ID (Job Posting Anchor) • Job Posting Title (Job Applications, Prospects, and Referrals) • Primary Location (Job Posting Anchor)

Location	Send Message Report Fields - No Posting (Business Object)	Invite to Apply Report Fields (Business Object)
Related Actions on the Candidate Profile		• Invite to Apply - External Posting URLs (Candidate Communication) • Job Requisition ID (Job Posting Anchor) • Job Posting Title (Job Applications, Prospects, and Referrals)* • Primary Location (Job Posting Anchor)

* Test this field thoroughly because it has variable behavior. Workday plans to provide a fix in a future release.

Unsupported Report Fields

This table lists the unsupported report fields for each message type, by location in Workday.

Location	Send Message Report Fields - No posting (***Business Object)***	Invite to Apply Report Fields (***Business Object)***
Embedded Fetch	• External URL (Job Posting Anchor) • Internal Posting URL (Job Requisition) • Invite to Apply - External Posting URLs (Candidate Communication) • Job Posting Title (Job Applications, Prospects, and Referrals) • Job Requisition ID (Job Posting Anchor) • Primary Location (Job Posting Anchor)	• Internal Posting URL (Job Requisition) • External URL (Job Posting Anchor • Job Posting Title (Job Applications, Prospects, and Referrals)
Find Candidates Report My Candidates Report Related Actions on the Prospect Profile View Candidate Pools Report	• External URL (Job Posting Anchor) • Internal Posting URL (Job Requisition) • Invite to Apply - External Posting URLs (Candidate Communication) • Job Posting Title (Job Applications, Prospects, and Referrals) • Job Requisition ID (Job Posting Anchor) • Primary Location (Job Posting Anchor)	• Internal Posting URL (Job Requisition) • Job Posting Title (Job Applications, Prospects, and Referrals)
Job Application Candidate List Grid	• External URL (Job Posting Anchor)	

Location	Send Message Report Fields - No posting (***Business Object***)	Invite to Apply Report Fields (***Business Object***)
Job Requisition Candidate List Grid	• Invite to Apply - External Posting URLs (Candidate Communication) • Job Requisition ID (Job Posting Anchor) • Primary Location (Job Posting Anchor)	
Related Actions on the Candidate Profile	• External URL (Job Posting Anchor) • Internal Posting URL (Job Requisition) • Invite to Apply - External Posting URLs (Candidate Communication) • Job Posting Title (Job Applications, Prospects, and Referrals) • Job Requisition ID (Job Posting Anchor) • Primary Location (Job Posting Anchor)	• Internal Posting URL (Job Requisition) • External URL (Job Posting Anchor)

Related Information
Tasks
Create Custom Reports

Candidate Personal Information

Setup Considerations: Candidate Personal Information

You can use this topic to help make decisions when planning your configuration and use of Workday Recruiting to collect and manage candidate personal information. 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 Recruiting enables you to request, track, and manage candidate personal information, such as gender identity and ethnicity.

Business Benefits

- Support your regulatory compliance obligations by collecting personal information from candidates at any stage of the recruiting process.
- Support your compliance with privacy regulations by purging candidate and job application data.
- Analyze hiring trends to help track your diversity goals through metrics and reports.

Use Cases

- Send requests to external candidates to upload a government or national ID and their date of birth.
- Creating custom reports to access candidate personal information quickly for compliance assessments.
- Send requests to external candidates applying for jobs based in the United States to complete the Voluntary Self-Identification of Disability form.
- View a summary of the gender and ethnicity of employees your organization hired for the current quarter.

Questions to Consider

Questions	Considerations
What kind of information do you want to collect from candidates?	You can collect: • Additional nationalities • Citizenship status • City of birth • Country of birth • Date of birth • Disability • Ethnicity • Gender identity • Hispanic or Latino • Marital status • Military service • National ID/Government ID • Primary nationality • Pronouns • Region of birth • Religion • Sexual orientation • Social benefits locality • Veteran status
Do you need to collect different information from candidates based on the location of the job?	The primary location you configure for a job requisition determines the information you can request from candidates who apply. Example: You can only collect a candidate's veteran status for job requisitions based in the United States. You can configure Workday to hide or require personal information fields based on country.
What kind of diversity goals do you want to track?	Workday enables you to track your diversity goals by delivering metrics and reports that analyze candidate gender and ethnicity information. You can: • Analyze hiring trends. • Identify which sources are giving you diverse candidates. • Review the diversity of your recruiting pipeline.

Recommendations

To ensure your processes when collecting and managing candidate personal information meet compliance obligations, seek guidance from your compliance team and legal advisers.

To avoid purging data unintentionally, test the Purge Person Data task and custom report in your Sandbox tenant before you purge any data in your Production tenant.

Configure custom notifications to notify candidates of requests for personal information.

Requirements

Access the Maintain Localization Settings task to select the personal information you want to collect from candidates and configure country-specific settings.

Limitations

Personal information and national and government ID collection are separate steps and tasks.

Workday only supports purge plans for candidates and job applications.

Tenant Setup

You can configure Workday to transfer country, city, and region of birth information from a candidate record to their pre-hire record by accessing the Edit Tenant Setup- Global task and adding the countries configured on the Maintain Localization Settings task to these fields:

- Country of Birth for Workers and Dependents in these Countries
- Track City of Birth for Workers and Dependents in these Countries
- Track Region of Birth for Workers and Dependents in these Countries

Security

Configure the *Candidate Data: Personal Information* domain and the subdomains in the Recruiting functional area for each item of personal information you want to request from candidates.

Business Processes

You can configure the *Personal Information Change* business process and add it as a step to subprocesses of the *Job Application* business process to collect personal information from candidates.

Reporting

You can use these reports to help you track your diversity goals:

Reports	Considerations
Candidate Flow	View personal information belonging to candidates who applied for a job within a specific date range.
Candidate Flow Summary	View a summary of candidates according to: • Ethnicity • Gender • Job categories • Race
Candidate Hire	View personal information belonging to candidates hired within a specific date range.
Candidate Profile Data	View stored information on candidates with job applications such as:

Reports	Considerations
	• Assessments • Attachments • Personal information You can also use this report to create custom reports that provide quick access to candidate information.
Candidate Search Audit	View the results of actions initiated by: • Automatic stage routing. Example: Automatically move candidates forward when they meet certain criteria. • The Decline and Move Forward buttons. • The Candidate Job Applications report.
Candidate Source Diversity Metrics - Ethnicity Candidate Source Diversity Metrics - Gender	Track how your recruiting sources are helping you reach your ethnicity and gender diversity goals.
Diversity Metrics	Review diversity information and breakdowns of ethnicity and gender according to requisition and job profile.
Pipeline Diversity Metrics - Ethnicity Pipeline Diversity Metrics - Gender	Track how your organization is meeting diversity goals related to ethnicity and gender.
Quarterly Diversity Metrics - Ethnicity Quarterly Diversity Metrics - Gender	View a summary of the gender and ethnicity of employees you hired for the current quarter and past 4 quarters.

Integrations

You can collect candidate personal information through third-party integrations, such as background check providers, and upload the information to the candidate record.

Connections and Touchpoints

Features	Considerations
Benchmark Reporting	Workday provides 2 benchmark reports you can use to track hiring goals for veterans and individuals with disabilities: • Veteran Hire Benchmark • Disability Placement Benchmark
VETS 4212 Report	You can use the VETS-4212 report to view the total number of employees or newly hired employees who identify as protected veterans.

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: Request Personal Information from Candidates on page 345

Steps: Purge Person Privacy Data

Steps: Request Additional Information from Candidates

Prerequisites

- Security: These domains in the Recruiting functional area:
  - *Candidate Data: Personal Information*
  - *Self-Service: Personal Information*
- Security: *Set Up: Tenant Setup - Global* in the System functional area.

Context

You can use the Change Personal Information task to request additional information from external candidates after they've submitted job applications. Example: Citizenship Status.

Workday uses the primary location of the job requisition to determine what types of information you can request. Example: You can collect a candidate's veteran status only for job requisitions based in the U.S.

Depending on the field, you can select a value defined for the country or country region of that location. Example: You can define 8 ethnicity values for Canada. Workers in Canada can select from those values in personal information tasks.

Workday includes personal information fields that can have different values by country and fields that have the same set of values regardless of the country. Example: The value of Marital Status is different by country.

You can add the *Change Personal Information* step to any of these stages of the *Job Application* business process:

- *Screen*
- *Review*
- *Assess*
- *Interview*
- *Reference Check*
- *Offer*
- *Background Check*
- *Ready for Hire*

When a job application reaches the *Change Personal Information* step, a candidate receives a notification requesting them to submit more information. You can configure the custom notification that the candidate receives to include a link to the external career site. The candidate must sign into their Candidate Home account to view and act on the pending tasks.

Steps

1. Access the Maintain Localization Settings task to configure personal information fields by country.
    a) Select *Personal Information* from the Area prompt.
    b) Select the Active check box for each Localized Field for the information that you want to collect. Example: Country of Birth.
    c) Select the countries or regions in which you want to enable the fields.

    Consult your legal counsel to ensure that your processes for collecting and managing candidate personal information meet compliance requirements.

    The Maintain Localization Settings task supports these fields:

    - Additional Nationalities
    - Citizen Status
    - City of Birth
    - Country of Birth
    - Date of Birth
    - Disability
    - Ethnicity
    - Gender
    - Hispanic or Latino
    - Marital Status
    - Military Service
    - Primary Nationality
    - Region of Birth
    - Religion
    - Sexual Orientation and Gender Identity
    - Social Benefits Locality

    For U.S jobs, exclude these data fields from the *Change Personal Information* step if you included them on the initial job application:

    - Gender
    - Ethnicity
    - Hispanic or Latino

    Security: *Set Up: Tenant Setup - Global* in the System functional area.
2. Maintain Security Group Permissions

    After enabling personal information fields for candidates, configure these tasks to ensure that you're collecting valid data:

    - Maintain Citizenship Statuses
    - Maintain Disability Configuration
    - Maintain Ethnicities
    - Maintain Genders
    - Maintain Marital Statuses
    - Maintain Military Statuses
    - Maintain Religions
    - Maintain Sexual Orientation & Gender Identities
    - Maintain Social Benefits Localities

    If you have already configured the fields for workers or pre-hires, you don't need to configure them again for candidates.

3. Steps: Set Up Personal Information Fields on page 36.

   If you're collecting Country of Birth, City of Birth, and Region of Birth, there's no set-up required for candidates. To map this data to the Pre-Hire record:

   a) Access the Edit Tenant Setup - Global task.

      As you complete the Personal Data for Workers section in the Edit Tenant Setup - Global task, consider:

Option	Description
Allow Multiple Ethnicities	From the Allow in these Countries prompt, select the countries where you want to enable multiple ethnicities.
Place of Birth	From these prompts, select the same countries you set up using the Maintain Localization Settings task in Step 1 above: • Track Country of Birth for Workers and Dependents in These Countries • Track City of Birth for Workers and Dependents in these countries • Track Region of Birth for Workers and Dependents in these countries

   The Hide Hispanic or Latino for Person in US check box relates to Workers only.

   If you enabled the Hispanic or Latino field in the Maintain Localization Settings task, candidates must submit this data if you've configured the *Change Personal Information* step.

   For jobs based in the U.S., Workday recommends that you don't use the *Change Personal Information* step to collect these data if you're collecting the same data during the initial job application:

   - Gender
   - Ethnicity
   - Hispanic or Latino

4. Add Candidate to Domain Security Policy.

   Add the *Candidate as Self* role to the domain security policy for each of the fields that you configured using the Maintain Localization Settings task. Example: For the *Self-Service: Citizenship Status* domain.

   a. Access the *Self-Service: Citizenship Status* domain.
   b. Click the magnifying glass icon next to the Domain Security Policy field.
   c. Click Edit Permissions.
   d. Add a row to the Report/Task Permissions section.
   e. On the Security Groups section, select *Candidate as Self* and select the Modify check box.

      Repeat these steps for each self-service domain where you're collecting data. Example: *Self-Service: Date of Birth*.
   f. Access the Activate Pending Security Policy Changes task.

5. Define Business Process Policy.

   Assign the *Change Personal Information* step to the *Candidate as Self* group in the appropriate business process. Example: The *Review Candidate* stage:

   a. From the related actions menu of the *Review Candidate* business process, selectBusiness Process Policy > Edit.
   b. In the Who Can Do Action Steps in the Business Process section on the *Change Personal Information* Action Step, select *Candidate as Self* on the Security Groups prompt.
   c. Click OK and Done.
   d. Activate Pending Security Policy Changes.

6. Update Business Process Definition.

   Add the *Change Personal Information* step to the *Job Application* business process and assign it to the *Candidate as Self* group in the appropriate stage. Example: *Review Candidate* .

   a) Access the *Review Candidate* business process type.
   b) Select the Business Process Definitions tab.
   c) From the related actions menu of the *Review Candidate* default definition, select Business Process > Edit Definition.
   d) Add the Effective Date and click OK.
   e) Add a step to the Business Process Steps section and enter these values:

Order	b
Type	*Action*
Specify	*Change Personal Information*
Group	*Candidate as Self*

   Add the *Change Personal Information* step after the *Initiation* step and before the *Review Decision* step or any completion step of a business process.

   f) Click OK and Done.

   By default, Workday displays the stage name to the candidate on Candidate Home when the *Change Personal Information* step gets activated. You can use the Step Label Override task to specify a custom name to display to the candidate instead of the stage name.

7. ../../../ilx/admin-guide/en-us/manage-workday/business-processes/business-process-notifications/dan1370797382653.dita.

   Configure a custom notification to alert candidates that you require more information when the *Change Personal Information* step is activated.

   Example: At the *Review Candidate* stage.

   a) From the related actions menu of the Review Candidate business process definition, select Business Process > Add Notification
   b) Select the Do Not Include Notification Details Link check box.
   c) In the Triggers section, click the On Entry option and select *Change Personal Information*.
   d) In the Recipients section, select *Candidate*.
   e) In the Email Message Content section, add a row and add the Subject and Body details.

8. Configure Domain Security Policy.

   Configure the appropriate domain policy for the roles that can access personal information on the Candidate Composite View page. This domain policy applies to both personal information data collected:

   - During the initial job application process.
   - While using the *Change Personal Information* step.

Result

Candidates who apply to jobs on the external career site receive an email notification when they move to a stage that has the *Change Personal Information* step. Requests for personal information also display as tasks on Candidate Home. The data provided is visible on the Personal Information tab on the Candidate Composite View page.

Next Steps

Update personal information for internal and external candidates from the candidate profile. To support your compliance obligations, purge candidate data and job applications when you no longer need them. You can use the:

- Agency Candidates in Progress report field to identify agency candidates for purging that have a Submit Recruiting Agency Candidate event in progress.
- Candidate Only Has Non-Submitted Job Applications report field to identify candidates who started a job application but didn't submit it.
- Latest Job Application Created On report field to identify incomplete job applications from a specific date range.
- Partially Completed Job Application report field to identify incomplete external candidate job applications that haven't been submitted.

The Candidate Only Has Non-Submitted Job Applications and Partially Completed Job Application fields exclude:

- Candidates who have at least 1 submitted job application that's not canceled or rescinded.
- Recruiting agency candidates.
- Purged candidates.

To include purged candidates in your custom reports, you can use these data source filters:

- *Existing and Purged Job Applications*, which won't return purged job applications when used with search reports.
- *My Applied Candidates (Including Purged Candidates)*

Related Information

Concepts

Setup Considerations: Personal Information by Country on page 32

Tasks

Steps: Set Up Personal Information Fields on page 36

Steps: Set Up Government and National IDs for Recruiting

Context

You can ask external candidates to upload a government or national ID at any of these stages in the recruiting process:

- *Review Candidate*
- *Screen*
- *Assess Candidate*
- *Interview*
- *Reference Check*
- *Offer*
- *Employment Agreement*
- *Background Check*
- *Ready for Hire*

You can configure a custom notification to alert candidates when you require additional information. Workday directs the candidate to the external career site or to the Edit Government IDs task, if they have a Candidate Home account.

To enter information on behalf of external candidates, select Edit Government IDs from the related actions menu of the candidate. This task isn't available for internal candidates.

Steps

1. Access the Maintain Localization Settings task.
    a) Select *Personal Information* from the Area prompt.
    b) For the localized fields of Government Identifiers (Candidate) and National Identifiers (Candidate), select the countries where you want to collect ID information on the Allow for Countries or Regions prompt.
    c) Select the Active check box for each localized field.

    This localization, along with access to the *Candidate Data: National and Government IDs* domain determines whether you can select Personal Data > Edit Government IDs from the candidate's related actions menu.

    Security: *Set Up: Tenant Setup - Global* domain in the System functional area.
2. Edit Domain Security Policies.

    Configure the security policy for the *Candidate Data: National and Government IDs* domain.
3. Activate Pending Security Policy Changes
4. Edit Business Process Security Policies.

    For each recruiting-related business process where you want candidates to enter IDs, assign the *Candidate as Self* security group to the *Change Government Identifiers* action step.

    Example: at the *Assess Candidate* step
    a) From the related actions menu of the Assess Candidate business process, select Business Process Policy > Edit.
    b) In the Who Can Do Action Steps in the Business Process section, under the *Change Government Identifiers* Action Step, select *Candidate as Self* on the Security Groups prompt.
    c) Access the Activate Pending Security Policy Changes task.

        Enter a comment to describe the security changes made, then review and confirm.
5. Edit Business Processes.

    For each recruiting-related business process where you want candidates to enter IDs, add the *Change Government Identifiers* step between the *Initiation* step and the *Review Decision* or *Completion* steps. Assign the step to the *Candidate as Self* security group.

    Example: at the *Assess Candidate* step

    a) From the related actions menu of the *Assess Candidate* business process, select Business Process > Edit Definition.
    b) Select the Effective Date.
    c) On the Edit Business Process Definition section, add a row to the Business Process Steps grid in the preferred order with these values:

Option	Description
Type	*Action*
Specify	*Change Government Identifiers*
Group	*Candidate as Self*

6. Create Custom Notifications.

   For each recruiting-related business process where you want candidates to enter IDs, add a notification to inform the candidate that you're requesting information from them.

   a) Select the Do Not Include Notification Details Link check box.
   b) In the On Entry field, select *Edit Government ID*.
   c) In the Recipients field, select *Candidate*.
   d) Include either of these report fields:

      - External Site Homepage: Link to the external career site where the candidate originally applied to the job.
      - External Career Site Task Link: Link that takes the candidate to the specific task.
7. Edit Domain Security Policies.

   Define the security policy for the *Candidate Data: National and Government IDs* domain in the Recruiting functional area.
8. Steps: Set Up Profiles and Profile Groups.

   Configure the candidate profile to include government and national IDs. This step adds a Personal tab and 2 subordinate tabs to the candidate profile. It also removes Personal Information from the Overview tab.

   a) Access the Configure Profile Group task.
   b) In the Profile Group field, select *Personal for Candidate Profile*.
   c) Select the Display in Profile check box.
   d) Add 2 rows.

      In the Report column, select:

      - *Personal Information*
      - *IDs*

Steps: Set Up Veteran Status Identification for Candidates

Context

When candidates apply for a job requisition that has the primary location in the United States, the Office of Federal Contract Compliance Programs (OFCCP) allows you to ask whether they identify as a protected veteran.

Steps

1. Access the Maintain Veteran Statuses for Candidates task.

   a) (Optional) Enter a Disclaimer Text. This text displays on the Veteran Status Identification Form for candidates.
   b) Give each status a unique Veteran Status Name.
   c) Select a Workday-delivered status that corresponds to each Veteran Status Name in the Maps to column.

   You can map more than 1 Veteran Status Name to 1 Workday-delivered status. You can't delete a status once you use it, but you can inactivate it.

   Security: *Candidate Data: Personal Information* domain in the Recruiting functional area.
2. Access the Create External Career Site or Edit External Career Site task.

   Add the *Veterans Status* field to the Apply - Personal Information section.

   Security: *Set Up: Career Sites* domain in the Recruiting functional area.
3. Edit Business Process Security Policies.

   Add the Candidate as Self security group to the *Update Candidate U.S. Veteran Status* action step for any subprocess of the *Job Application* business process.

4. Activate Pending Security Policy Changes.
5. Edit Business Processes.

   Add the *Update Candidate U.S. Veteran Status* action step to the subprocess of the *Job Application* business process for which you completed step 3. This step enables you to collect veteran status information for candidates who didn't enter it when they first applied. You can use condition rules to configure which candidates complete this step. Example: Candidates who didn't submit veteran status information when applying to a job posting on the external career site.

   Select these values:

Option	Description
Specify	*Update Candidate U.S. Veteran Status*
Group	Candidate As Self

Result

Candidates applying to job requisitions in the United States on the external career site can complete the optional Veteran Status Identification Form. The *Update Candidate U.S. Veteran Status* action step sends external candidates a request to enter their veteran status information.

For internal candidates applying to job requisitions in the United States, Workday extracts their military status from their personal information. If they:

- Have a military status that maps to the Workday-delivered Active Duty military status, Workday populates their veteran status as *IDENTIFY AS A VETERAN, JUST NOT A PROTECTED VETERAN* on the job application.
- Have a military status that maps to other Workday-delivered military statuses, Workday populates their veteran status as *IDENTIFY AS ONE OR MORE OF THE CLASSIFICATIONS OF PROTECTED VETERANS*.
- Don't have any military status information, Workday populates the veteran status as *I DO NOT WISH TO SELF-IDENTIFY*.

Steps: Request Personal Information from Candidates

Prerequisites

- Hide or require personal information fields by country on the Maintain Localization Settings task.
- Security: Configure these domains in the Recruiting functional area:
  - *Candidate Data: Gender Identity*
  - *Candidate Data: Pronoun*
  - *Candidate Data: Sexual Orientation*

Context

You can send a request to external candidates at any stage in the recruiting process to provide additional personal information.

Workday uses the primary location of the job requisition to determine what types of information you can request. Example: You can collect a candidate's veteran status only for job requisitions based in the U.S.

Steps

1. Set up personal information for candidates.

   Selecting the Hide Hispanic or Latino for Person in US check box on the Edit Tenant Setup - Global task has no impact on collecting this information for candidates.

   See Steps: Set Up Personal Information Fields on page 36.

2. Maintain Security Group Permissions.

   For the *Candidate as Self* security group, enable *Modify* permission on the *Self-Service: Personal Information* domain and relevant subdomains.
3. Edit Business Processes.

   Add the *Personal Information Change* business process as a step to these business processes:

   - *Assess Candidate*
   - *Background Check*
   - *Interview*
   - *Offer*
   - *Reference Check*
   - *Review Candidate*
   - *Screen*

   Add the *Change Personal Information* step between the *Initiation* step and the *Review Decision* or *Completion* steps. Select *Candidate as Self* as the Group.
4. Create Custom Notifications.

   Set up a custom notification on the *Personal Information Change* business process to let candidates know they received a request to provide personal information. To include a link to the external career site in the notification body, use the External Site Homepage Link report field.
5. Edit Domain Security Policies

   Define the security policy for the *Candidate Data: Personal Information* domain and its associated subdomains.

Result

Candidates who apply to jobs on the external career site receive an email notification when they move to a stage that has the *Change Personal Information* step. Requests for personal information also display as tasks on Candidate Home.

Next Steps

Update personal information for internal and external candidates from the candidate profile.

To support your compliance obligations, purge candidate data and job applications when you no longer need them. You can use the:

- Agency Candidates in Progress report field to identify agency candidates for purging that have a Submit Recruiting Agency Candidate event in progress.
- Candidate Only Has Non-Submitted Job Applications report field to identify candidates who started a job application but didn't submit it.
- Latest Job Application Created On report field to identify incomplete job applications from a specific date range.
- Partially Completed Job Application report field to identify incomplete external candidate job applications that haven't been submitted.

The Candidate Only Has Non-Submitted Job Applications and Partially Completed Job Application fields exclude:

- Candidates who have at least 1 submitted job application that's not canceled or rescinded.
- Recruiting agency candidates.
- Purged candidates.

To include purged candidates in your custom reports, you can use these data source filters:

- *Existing and Purged Job Applications*, which won't return purged job applications when used with search reports.

- *My Applied Candidates (Including Purged Candidates)*

Related Information
Tasks
Steps: Purge Person Privacy Data
Reference
Reference: Purgeable Data Types
2020R2 What's New Post: Include Purged Candidates in Reports

Steps: Set Up Aboriginal/Indigenous Self-Identification for Candidates

Context

You can configure career sites with options for candidates to self-identify as Aboriginal or Indigenous.

Steps

1. Configure Aboriginal and Indigenous identification for workers.
   See Steps: Set Up Aboriginal/Indigenous Identification Details on page 44.
2. Edit Domain Security Policies.
   Configure the *Candidate Data: Aboriginal/Indigenous Identification* domain in the Recruiting functional area.
3. (Optional) Create External Career Sites on page 379.
   As you configure personal information, add both of these fields:
   - *Aboriginal/Indigenous Identification*
   - *Aboriginal/Indigenous Identification Details*
4. (Optional) Create Internal Career Sites for Non-Workers on page 386.
   As you configure personal information, add both of these fields:
   - *Aboriginal/Indigenous Identification*
   - *Aboriginal/Indigenous Identification Details*

Result

Candidates can specify how they identify as they complete their application.

Concept: Purging Recruiting Data

To meet privacy regulations and General Data Protection Regulation (GDPR), Workday enables you to purge Personally Identifiable Information (PII) from your tenant for data types you select.

You can purge specific PII from your Workday tenant for populations you select in a custom report.

Examples:

- Active workers
- Candidates
- Pre-Hires
- Pre-Hires with candidate profiles
- Prospects
- Terminated workers

Workday enables you to create and manage purge plans where you can specify data populations to include in a purge.

Note: When you purge data, you permanently remove it from your tenant. Workday can't reverse or roll back the data deletion.

To protect against deleting crucial data, Workday recommends that you:

- Grant the ability to purge data to users who understand the purging process and its consequences.
- Only purge the data that you've tested and confirmed in Sandbox before you purge in your Production environment.

Person Data Purge

You can use the Purge Person Data task to remove only the PII that you specify in the purge plan. You can use this task when you periodically need to purge sets of data. Example: For terminated workers.

Single Entity Purge

Workday enables you to purge a single entity like a candidate or a job application using the related actions menu of that entity. Security groups with access to the *Purge Single Entity Data* domain can purge individual records.

Candidate Data Purge

You can purge candidates or candidate documents upon request or when you no longer need them. Example: Candidate job applications when they've accepted another job.

When you purge a:

- Candidate who you don't hire, Workday removes the candidate PII, their Candidate Home username, and all documents associated with the candidate.
- Candidate who you hire, Workday removes their Candidate Home username and the Candidate Documents section from their worker profile.

Worker Data Purge

Workday only purges workers who you:

- Mark as Eligible for Purge in a custom report that you can create using the Purge Person Data task.
- Terminate. You can't purge workers with an active worker position or a pending termination.

Workday doesn't purge:

- Candidates for an open or frozen job.
- Future hires.

Terminated Worker Data Purge

When you purge terminated workers, Workday no longer returns them in searches, and removes all their PII. For historical headcount purposes Workday:

- Indicates the purged instance as Purged Person wherever their name normally displays.
- Associates any remaining data with Purged Person instead of an identifiable person.

Related Information

Concepts

Concept: Purging Person Privacy Data

Tasks

Steps: Purge Person Privacy Data

Reference

FAQ: Purge Person Data

Reference: Purgeable Data Types

Collect Candidate Disability Statuses

Prerequisites

Security: *Candidate Data: Personal Information* domain in the Recruiting functional area.

Context

You can send a request to external candidates to complete the Voluntary Self-Identification of Disability form at any stage in the recruiting process. The request also displays as a task on Candidate Home.

If you configure the Voluntary Self-Identification of Disability form to display in the job application and in another stage of the recruiting process, the candidate only receives the form once.

Steps

1. Access the corresponding business process of the stage in which you want external candidates to be able to self-identify a disability status.

   Example: If you want the Voluntary Self-Identification of Disability form to display in the *Review Candidate* stage, access the *Review Candidate* business process.

   Note: Ensure that the business process you select is configured as a step on the larger *Job Application* business process.
2. Select Business Process > Edit Definition from related actions menu of the business process.
3. Add *Update Candidate U.S. Disability Status* as an action step on the business process for the *Candidate as Self* group.

Next Steps

To change a candidate's disability status, select Candidate > Update Disability Status from the candidate's related actions menu.

Related Information
Tasks
Steps: Set Up the Recruiting Workflow on page 193
Create External Career Sites on page 379

Troubleshooting: Incorrect Candidates or Job Applications Purged

When you run a custom purge report in your Sandbox tenant, Workday purges the wrong records or more records than intended.

Note: Purging is permanent and irreversible. Test custom purge reports in your Sandbox tenant before purging in your Production tenant.

Cause: The custom purge report uses an OR filter condition.

Solution:

Steps

Security: The *Purge Person Data* domain in the System functional area.

1. Access the Edit Custom Report task.
2. Select your custom purge report.
3. On the Filter tab, replace rows that use OR filter conditions with AND filter conditions.

Related Information
Concepts
Setup Considerations: Data Purging

Reference

Reference: Event-Specific Best Practices

Candidate Expenses

Setup Considerations: Candidate Expense Reports

You can use this topic to help make decisions when planning your configuration and use of candidate expense reports. 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

You can enable workers to create expense reports on behalf of candidates to reimburse them for incurred expenses.

Business Benefits

- Analyze candidate expense data to make more informed decisions for HR initiatives.
- Eliminate manual workarounds, such as ad hoc payments and use of noncandidate payee types.
- Expedite reimbursement by routing candidate expense reports to specific reviewers and approvers.
- Reduce data duplication by centralizing candidate expense data in Workday.
- Track and report on recruiting costs for greater spend control.

Use Cases

- Reimburse candidates who incur recruitment costs, such as flights to interview sites and hotel stays.
- Report on job requisition totals, such as total costs for supplier invoices and candidate expenses.
- Submit expense reports that include multiple payee types, such as candidates and employees who attend the same team lunch.

Questions to Consider

Questions	Considerations
What expense data do workers manage?	You can configure segmented security to enable workers to access only candidate expense data. When you enable segmented security, workers with: • Constrained security can work only with candidate expense data and job applications for the companies they can access. • Unconstrained security can access expense data and job applications for candidates associated with all companies in their tenant. When you don't enable segmented security, constrained and unconstrained workers can select

Questions	Considerations
	all nonworker payee types, including candidates, on the Create Expense Report for Non-Worker task. However, without the adequate security permissions, workers won't have the ability to select specific nonworkers on the Pay To prompt.
How do you manage credit card transactions for candidates?	Although candidates don't use corporate expense credit cards, you can reassign credit card transactions to them to expense costs incurred on their behalf. When you reassign credit card transactions to candidates, Workday displays the transactions on their expense reports so you can select them for inclusion. When you don't reassign credit card transactions to candidates, your custom and standard reports might contain limited expense data, which can affect your ability to analyze total spend.
What expense report data can you purge for candidates?	When you select the *Financials – Expense Reports* purgeable data type on the Purge Person Data task, Workday purges: • Any memos on the expense report header and line items. • The file, filename, and comments on any attachments.

Recommendations

- For accurate reporting, enable the Job Requisition worktag type on expense reports to track cost totals for job requisitions.
- When evergreen job requisitions don't have an associated manager or supervisory organization, configure calculated fields to route expense reports to other reviewers and approvers.

Requirements

- Assign workers with constrained security access to the required companies so that they can access candidate data and associated job applications.
- To submit expense reports on behalf of candidates, add expense payments as an option on their payment elections.

Limitations

Candidates don't have the ability to create their own expense reports in Workday.

We don't provide a *Candidate* worktag for use on expense reports. Instead, you can use these report fields to report on candidate expenses:

- Expense Payee Type
- Expense Report Payee

Workday doesn't support:

- Confidential job requisitions on candidate expense reports.
- Spend authorizations and cash advances for candidates.

Tenant Setup

No impact.

Security

Domains	Considerations
Candidate Data: Candidate Expenses in the Recruiting functional area.	Enables you to create expense reports for candidates and associate job applications with candidate expenses.
Process: Credit Card in the Common Financial Management functional area.	Enables you to reassign credit card transactions to candidates.
Process: Expense Reports in the Expenses functional area.	Enables you to manage expense reports and related reporting. You can configure segmented security on this domain to enable workers to access only candidate data on expense tasks and reports.
Manage: Payment Election in the Expenses functional area.	Enables you to manage payment elections on behalf of candidates.

Business Processes

You can configure the *Expense Report Event* business process to route candidate expense reports for review and approval. You can also route candidate expense reports to specific reviewers and approvers.

Reporting

Reports	Considerations
Find Credit Card Transactions	Use to view credit card transactions you reassign to candidates.
Find Expense Report Lines for Organization	Use to view expense report lines for candidates by organization.
Find Expense Reports	Use to view expense reports you create for candidates.
Find Payments	Use to view candidate expense payments: • For auditing purposes. • To review payment statuses.
Maintain Worktag Usage	Use to enable the Job Requisition worktag type on expense reports and supplier invoices. To make manual corrections on journal entries related to expense reports and supplier invoices, you can also enable the Job Requisition worktag type on: • Accounting journals. • Ad hoc bank transactions.

When you enable segmented security, you can use these report data sources and their filters to create custom reports with candidate expense data only:

- Expense Report Lines and Itemizations
- Expense Report Lines for Company
- Expense Reports for Company

You can configure multiple security segments to enable workers to access expense data for multiple payee types on custom reports. Example: Create a custom report that includes candidate and student expense data, but not expense data for external committee members.

Integrations

Web Services	Considerations
Get Expense Reports	Use to retrieve data for candidate expense reports. When you enable segmented security, you can use this web service to retrieve expense data only for candidates.
Get Payments	Use to retrieve data for candidate expense payments.
Get Settlement Run Custom Filters *Put Settlement Run Custom Filter*	Use to upload and retrieve data for the custom filters you create for candidate settlement runs.
Get Payment Election Options *Put Payment Election Option*	Use to upload and retrieve payment election options for candidate expenses.
Submit Expense Report for Non-Worker	Use to upload data to submit expense reports for candidates. When you enable segmented security, you can use this web service to upload expense data only for candidates.
Submit Settlement Run	Use to upload data to settle and reimburse candidate expenses.

Connections and Touchpoints

Features	Considerations
Accounting	Workday automatically generates a *Job Requisition* worktag on accounting journal lines associated with candidate expense reports and their job applications. We generate this worktag only on spend journals, not on journals related to: • Liabilities. • Payables. • Payments.
Settlement	You can create: • Custom filters for settlement runs for candidates. • Settlement runs to settle and reimburse candidate expenses.

Features	Considerations
Supplier Accounts	You can enable the Job Requisition worktag type on supplier invoices to capture more detailed cost totals for job requisitions.

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 Expense Reports

Create Segment-Based Security Groups

Steps: Create Expense Reports for Nonworkers on page 356

Reference

Reference: Purgeable Data Types

2022R1 What's New Post: Expense Reporting for Candidates

Steps: Enable Workers to Create Expense Reports for Nonworkers

Prerequisites

- Set up expense reporting.
- Review setup considerations for nonworker expense reports.

Context

You can enable workers to create and submit expense reports on behalf of these nonworker types as they don't typically have access to Workday:

- Candidates.
- External committee members (ECMs).
- Students.

Steps

1. Steps: Set Up Security Permissions.

   Add workers to the *Process: Expense Reports* domain in the Expenses functional area and 1 or more of these domains so they can create expense reports for nonworkers:

Nonworker	Domains
Candidate	*Candidate Data: Candidate Expenses* in the Recruiting functional area.
ECM	*Committees: View* in the Organizations and Roles functional area.
Student	For matriculated students, these domains in the Student Core functional area: • *Student Data: Student ID* • *Student Data: Student Profile* For external students: • *External Student Data: Student ID* in the Personal Data functional area.

Nonworker	Domains
	• *External Student Data: Student Public Reports* in the Staffing functional area.

2. (Optional) Create Segment-Based Security Groups.

   Configure which nonworker types display on the Create Expense Report for Non-Worker task by enabling access to the *Expense Payee Type* security group segment.
3. (Optional) ../../../../financial-management/expenses/setting-up-expense-reports/dan1370797729300.dita.

   Use these report fields to route nonworker expense reports to specific reviewers and approvers:

   - Expense Report Pay To is Candidate
   - Expense Report Pay To is External Committee Member
   - Expense Report Pay To is Student
4. (Optional) Access the Maintain Worktag Usage report.

   In the Expense Report section, enable the Job Requisition worktag type to select *Job Requisition* worktags manually on these tasks:

   - Create Expense Report
   - Create Expense Report for Non-Worker: ECMs and students only
   - Create Expense Report for Worker

   When you add nonworkers on the Attendees prompt on these tasks, you can use the *Job Requisition* worktag to associate attendee expenses with job requisitions. Example: You create an expense report for an employee lunch that a candidate also attends.

   Note: Workday always automatically includes *Job Requisition* worktags on journal lines for candidate expense reports that you create on the Create Expense Report for Non-Worker task. You can't remove these worktags as they help ensure accurate accounting and reporting.

   Security: *Set Up: Enable Worktags* domain in these functional areas:

   - Common Financial Management
   - Worktags
5. (Optional) ../../../../financial-management/settlement/settlement-configuration/dan1370797014754.dita.

   Create custom filters for the settlement runs that you make for nonworkers.
6. (Optional) Access the Reassign Expense Credit Card Transactions task.

   Reassign credit card transactions to nonworkers to include the transactions on their expense reports.

   Security: *Process: Credit Card* domain in the Common Financial Management functional area.

Next Steps

- Add expense payments on payment elections for nonworkers.
- Create nonworker expense reports and itemize expense lines.

Related Information

Concepts

Concept: Worktags

Reference

2022R1 What's New Post: Expense Reporting for Candidates

Steps: Create Expense Reports for Nonworkers

Prerequisites

- Configure the *Expense Report Event* business process and security policy in the Expenses functional area.
- Enable workers to create expense reports on behalf of nonworkers.

Context

You can create expense reports on behalf of these nonworker types to reimburse them for incurred expenses:

- Candidates
- External committee members (ECMs)
- Students

Steps

1. ../../../../financial-management/expenses/payment-elections/dan1370797015134.dita.

   Add the *Expense Payments* option on payment elections for nonworkers.
2. Access the Create Expense Report for Non-Worker task.

   As you complete the task, consider:

Option	Description
Payee Type	Workday displays these options when you don't enable segmented security: • *Candidate* • *External Committee Member* • *Student* When you enable segmented security, you can select only the nonworker types for which you have access.
Pay To	You need the adequate security permissions to select specific nonworkers from this prompt. You can enter unique student IDs to ensure that you select the correct student.
Committee	Workday displays this prompt when you select *External Committee Member* as the payee type. When ECMs have: • One associated committee, Workday populates this prompt automatically. • Multiple committees, you can select a committee manually.
Job Application	Workday displays this prompt when you select *Candidate* as the payee type. When candidates have: • One associated job application, Workday populates this prompt and any related worktags automatically. This

Option	Description
	functionality doesn't apply to evergreen job requisitions. • Multiple job applications, you can select a job application manually.
Creation Options	Workday doesn't copy: • Attachments. • Expense itemizations. • Quick expenses.
Worktags	Use worktags as keywords to more easily classify and find transactions. Configure the allowed worktag types on the Maintain Worktag Usage task. When you select a worktag type that has related worktags, Workday automatically populates transactions with the related worktag values.
Credit Card Transactions	Select the reassigned expense credit card transactions that you want to include on the expense report.

Next Steps

Create a manual settlement run or schedule an automatic settlement run to settle expense reimbursements.

Related Information
Tasks

Create Expense Lines

Itemize Expense Lines

Career Sites

Setup Considerations: External Career Sites

You can use this topic to help make decisions when planning your configuration and use of external career sites. It explains:

- Why to set 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 provides you the ability to create 1 or more external career sites. You can post and market jobs that candidates can apply to.

Business Benefits

You can configure external career sites to:

- Enable your candidates to complete tasks.
- Support specific countries and locations.
- Use company branding.
- Enable prospects to submit a resume and additional information without applying to a job, logging in, or creating an account.
- Define the sections that candidates must complete when they apply for a job.
- Integrate it with your social media recruiting outlets, such as Facebook, Twitter, Glassdoor®, and more.
- Detail terms and conditions by country as well as collect account creation consent.
- Provide job alerts.

Workday also makes it easier for candidates to use Quick Apply, to apply to jobs. Quick Apply populates fields on the job application from the resume, CV, or previous applications of a candidate. Workday also performs a virus scan on files that candidates upload using industry standard virus scanning tools, but doesn't guarantee that all files are scanned or that all viruses are detected.

Use Cases

- Collect information for particular job requisitions from candidates including their skill-set, experience, and interests to assess their qualifications.
- Candidates can create and manage their account.
- Prospects can submit information and create a prospect record.
- Workday enables you to configure language options that your candidates can select.
- Workday enables you to require candidates to complete regulatory compliance information when applying to jobs.

Questions to Consider

Question	Considerations
Why should you create multiple career sites?	You can target specific audiences with each career site to present relevant data to specific populations like brands and locations.
What features are available if you want to communicate important messages to candidates or collect candidate consent?	Workday enables you to stay GDPR compliant by enabling you to configure certain settings that maintain data privacy for external candidates, such as: • To explain your data collection and retention policies, configure a link to your company privacy policy. • Configure terms and conditions by country for your candidates to agree, on a job application. • Require consent when external candidates create an account. • Enable external candidates to request that their information gets deleted from Workday.
Can you brand your career site?	You can use the Create Brand task to brand your career site to match your company branding. You can also add an About Us description in the Candidate Home section.

Question	Considerations
Can you use Google Analytics?	You can attach your Google Analytics account.
What data does Workday share with social sign in companies such as Google or Apple?	Workday does not share any candidate data with social sign in companies except the candidate's email address.
Can I enable social sign in for some of my external career sites?	No, this is a tenant-level setting, meaning that either social sign in is enable for all of your external career sites or none of them.
Can you track where candidates see your job postings?	You can set up tracking pixel URLs for each external career site. Workday uses values in the section to embed a URL from your third-party application, on the confirmation pop-up. The tracking pixels send conversion data for completed applications back to your third-party application. If you configure the EU Cookie Policy settings for an external site: Workday only sends the tracking pixel data to the third party after the candidate dismisses the EU Cookie Policy and they reach the Apply Confirmation pop-up. If you don't configure an EU Cookie Policy or candidates are in a different time zone, then tracking happens automatically.
Can you edit or delete external career sites?	You can't delete used sites, but you can maintain sites with the Edit External Career Sites task.
Can you automatically announce when your company posts new jobs?	You can set up external job alerts, which enable candidates to set and receive automated notifications of new jobs posted either daily or weekly.

Recommendations

Set up accounts with third-party vendors that do your tracking pixel reporting.

You can ensure that your candidates have helpful facets to find the jobs, by selecting a custom report in the Find Jobs Custom Report field.

You can configure and display sidebar configurations that provide candidates with information about your organization.

Requirements

Before enabling candidates to use Skills Cloud skills, you must opt in to the Skills Cloud.

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.

Limitations

You can configure items like Tracking Pixels, but Workday doesn't support the reporting. You need separate third-party vendors for reporting.

Tenant Setup

You can configure these external career site features for your tenant on the Edit Tenant Setup - Recruiting task:

- Require Candidate Home Account
- Enable Candidate Verification Email
- Candidate Social Sign-In Providers
- Candidate Social Sign-In Consent Message
- Enable Alternate External Career Site URL
- Candidate Consent
- Collect Preferred Name
- Privacy Policy Link URL
- Privacy Policy Link Text

Security

Configure these domains in the Recruiting functional area:

Domains	Considerations
Set Up: Career Sites	The security groups in this domain have access to create and edit external and internal career sites.
Set Up: External Career Site Access	This domain enables you to create, manage, and edit external career sites.
Candidate Data: Personal Information	This domain enables you to collect personal information from candidates.
Self Service: External Recommended Jobs	This domain enables similar recommended job postings to display on the Candidate Home.

Business Processes

You can configure steps on the *Job Application* business process that you can send to external candidates in the *Candidate as Self* group. Candidates can complete the task in their Candidate Home. Candidates have the option to withdraw a job application, which cancels the *Job Application* business process.

Reporting

You can use these reports:

Report	Considerations
Candidates With Purge Request	You can use this report to view candidates who request that you delete their information from Workday.
• Find Jobs for External Career Sites • Find Jobs Template for External Career Sites	You can use these reports to present a list of published job postings to candidates. You can also use these reports to configure the subtitle fields that display for job posting search results.

Integrations

Integration Technology	Description	Advantages
Adobe Sign	This tool replaces paper and ink signature processes with fully automated electronic signature workflows.	You can easily send, sign, track, and manage signature processes using a browser or mobile device.
Apply with LinkedIn	This tool prefills the job application of a candidate based on information from their LinkedIn account.	Reduces the amount of time a candidate takes to apply to a job posting.
Apply with SEEK	This tool prefills the job application of a candidate based on information from their SEEK account.	Reduces the amount of time a candidate takes to apply to a job posting.
DocuSign	This tool enables you to collect electronic signatures and manage digital transactions.	This tool enables you to have electronic exchanges of signed documents.
Google Analytics	This tool helps you track data on how users interact with your company.	This data gives you information about candidate traffic on your external career sites.
Inline Assessments	This tool enables you to integrate with third-party assessment vendors for registering candidates that are applying for a job.	You can collect and view data to find the best candidate for the position you're hiring for.
Tracking Pixels	This tool enables you to configure multiple tracking pixel URLs for each career site that you configure, so that you can track conversions for third-party vendors.	You can use the conversion data to track and analyze website data.

Connections and Touchpoints

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

External career sites also have some impact on these tenant configurations:

- Compliance
- Global
- Translations

Related Information
Reference

Workday 32 What's New Post: Recruiting Legal and Preferred Names

Workday 32 What's New Post: External Candidate Job Alerts

Workday 32 What's New Post: External Career Site Privacy Policy

Workday 32 What's New Post: Multiple Tracking Pixels

Workday 32 What's New Post: Candidate Delete My Information
Workday Community: Innovation Services Descriptions and Exhibits

Setup Considerations: Branding for External Career Sites

You can use this topic to help make decisions when planning your configuration and use of Branding for External Career Sites. 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.

What It Is

Custom branding enables you to align external career sites to the brand of your company. You can create custom brands that you can publish and apply to your published external career sites. Custom branding provides a better experience for external users when they apply to your company.

Business Benefits

Configurable branding presents candidates with an external career site that continues the look and feel of your company brand instead of a third party. You can configure separate brands per career site.

Use Cases

You can brand your external career sites to maintain branding throughout external career sites.

Questions to Consider

Questions	Considerations
How can you create new brands?	You can use these tasks to create, view, edit, and publish brands: • Create Brand • Edit Brand • Review Brand Summary • View All Brands
How do you apply a brand to an external career site?	First create and publish a brand to apply it to an external career site. You can then apply it to an external career site by editing the external career site.
What are Hex colors?	The Create Brand task uses Hex codes for all colors. A color Hex code is a 6-digit code to specify color using hexadecimal values. The code itself is a Hex triplet, which represents 3 separate values that specify the levels of the component colors. Workday designed the brand tasks this way in order to support 16,777, 216 colors. Example: #b4d455

Questions	Considerations
	If you don't enter a Hex color code in a field, Workday populates a Workday defined-default color for that field.
What can you brand with Hex colors?	Use the Create Brand task to specify Hex colors for: • Header • Buttons • Additional Components
What header elements can you brand?	You can specify Hex colors for: • Accent Color • Background Color • Text Color
What button elements can you brand?	You can specify Hex colors for: • Border Color • Color • Hover Border Color • Hover Color • Hover Text Color
How does Workday calculate active and disabled button colors?	Workday calculates colors based on other button color configuration for these button elements: • Active buttons change color when you click them. Active button colors are a slightly darker version of Hover Color. If you use white for Hover Color, Workday uses gray for the active color. • Disabled buttons are buttons that aren't active. They're a slightly lighter version of Color, Border Color, and Text Color.
What additional components can you brand?	You can specify Hex colors for the progress bar. • Accent Color • Header Text Color • Progress Bar The Accent Color value applies to UI objects that include: • Check boxes. • The field focus color. • The prompt selection color. • Radio buttons. • The upload resume icon.
What happens if you don't specify something for a branding element?	If you select not to configure an element, then the element gets the default color that Workday provides. You can review the default color for a given element on the Review and Submit section of the Create Brand task.
Where can you upload images?	In the Header section, you can upload:

Questions	Considerations
	• A banner image • An image • Your logo
What is an image pixel width and height?	Workday identifies resolution for branding on external career sites with pixels.
What is the difference between Maintain Proportions and Keep Height and Crop Image for the Image Banner?	If you select Maintain Proportions option, Workday keeps the entire Logo Attachment image in view. The Maintain Proportions option also aligns the banner image with the web page content. If you select this option, select a width bigger than 1098 pixels wide. If you select the Keep Height and Crop Image, Workday maintains height specified in pixels and expands the image width according to the window size. If you select this option, select an image bigger than 1920 pixels wide. You can select this option if you don't need to see the entire image on every screen size.
What are the different statuses of brands?	Brands can be in these statuses: • Edited (Unpublished Changes) • Published • Not Published To view brand changes on an external career site, you need to first republish a brand. These changes might take up to 15 minutes. To apply a brand, you must first have a published career site.
What is the difference between an Edited and Published brand?	When you edit both types of brands, your changes only affect the Published brand. You can also only apply Published brands on external career sites.
Is there anything that you need to know about accessibility and Web Content Accessibility Guidelines (WCAG)?	You're responsible for evaluating whether your color contrast choices comply with your accessibility obligations, including default and non-default Workday colors.
Does Logo have any special limitations?	Workday uses the Logo Attachment for the About Us image.

Recommendations

Functionality	Recommendation
Logo	For best results on social media sites, attach an image that is 1200 x 630 pixels. This image also displays when you share job posts on LinkedIn. We recommend that you test out different sizes to ensure it renders

Functionality	Recommendation
	appropriately on both sites. Use an image that is at least 400 pixels wide to ensure optimal viewing on shared posts. You can review documentation on LinkedIn for their image specifications.
Maintain Proportions	Select a banner with a width that is more than 1098 pixels wide.
Keep Height and Crop Image	Select an image for image banner with a width more than 1920 pixels wide.
Color Contrast Ratio	Select a Color Contrast Ratio of 4.5 or higher between background and text colors because of Web Content Accessibility Guidelines AA (WCAGAA).
Start Your Application Message	When candidates click Apply on a job, Workday displays available apply options in a pop-up. You can use this field to configure a message with up to 150 characters to display in the pop-up with apply options.

Requirements

No impact.

Security

Users with security enabled for the *Set Up: Site Branding* domain in the Recruiting functional area can create, edit, and maintain brands.

Integrations

You can use these web services to create, edit, or bulk upload brands:

- Get Site Brands
- Put Site Brand

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.

Other Impacts

Branding directly affects your live external career sites that are using brands.

Related Information
Reference
Workday 33 What’s New Post: External Career Site Custom Branding
The Next Level: Custom External Career Site Branding
2020R2 What's New Post: Job Application Branding and Usability for External Career Sites

Concept: Social Sign In for Candidate Accounts

As the External Career Site administrator, you can enable external candidates to use their Google or Apple accounts to create candidate accounts and apply for jobs in your organization. This can streamline the candidate account creation process and eliminates the need for a separate password for candidates to remember. Enabling social sign in doesn't change the URL for Create Candidate Home Account. You can use the Candidate Social Sign-In Consent Message field on the Edit Tenant Setup- Recruiting task to create a rich text message for candidates using social sign in. You can add helpful links and information to this custom consent message. Selecting a provider from the Candidate Social Sign-In Providers field

The sign in process is the standard process for Google or Apple accounts owned and managed by those companies. Google and Apple control the password reset process. Workday doesn't control the sign in process or password reset.

The *Register SSO Client* background job needs to run before candidates can use their social accounts to sign in. Depending on when you enable this feature by selecting a provider, this can take up to 24 hours before the feature works for your external career sites.

Related Information

Tasks

Enable Social Sign in for Candidate Accounts on page 377

Steps: Set Up External Career Sites

Prerequisites

Security: *Set Up: Career Sites* domain in the Recruiting functional area.

Context

Workday enables you to create 1 or more external career sites where you publish and market jobs that candidates can apply to. Candidates can also use Quick Apply that populates fields on the job application from their resume or CV automatically. Workday performs a virus scan on files that candidates upload using industry standard virus scanning tools, but doesn't guarantee that all files are scanned or that all viruses are detected.

Steps

1. Maintain Security Group Permissions.

   Add the *Candidate as Self* group with *Modify* access to the security policies on these domains:

   - *External Application History*
   - *External Careers*
   - *External Recommended Jobs*
2. Access the Edit Tenant Setup - Recruiting task.

   Consider these fields:

   - Enable Automatic Candidate Merging
   - Enable Candidate Verification Email
   - Require Candidate Home Account

   See Reference: Edit Tenant Setup - Recruiting.

   Security: *Set Up: Tenant Setup - HCM* in the System functional area.
3. Maintain Recruiting Sources on page 272.
4. Create Job Posting Templates on page 416.
5. Create Locations.
6. Access the Maintain Feature Opt-Ins report.

   Opt in to the External Career Site Apply Flow Improvements feature.

   Security: *Set Up: System* in the System functional area.
7. Create External Career Sites on page 379.

8. Create sidebar configurations.

   See Steps: Configure External Career Site Sidebars on page 368.
9. (Optional) Configure automatic address lookup for Japan and Republic of Korea.

   Select Contact Information for the Area.

   Enter *Japan* and *Korea, Republic of* in the Allow for Countries or Regions column for the Enable Address Lookup localized field and select the Active check box.

   See Maintain Localization Settings on page 144.

Next Steps

Use these reports to view candidate sign-in activity:

- Candidate Signons and Attempted Signons
- Candidate Invalid User Signon Attempts

To add, remove, and reorder subtitle fields on the Search for Jobs page for external career sites, use the Find Jobs for External Career Sites report.

To support global recruiting, you can translate external career sites.

Related Information
Reference
Reference: Track Sign-In Activity for External Sites
Workday 31 What's New Post: Address Lookup for Japan and Korea
2024R2 Feature Release Note: External Career Site Job Applications

Steps: Set Up Candidate Home Accounts

Prerequisites

Set up external career sites.

Context

When you set up Candidate Home accounts, candidates can register an account on your external career site. You can also require Candidate Home accounts for all job applications.

You can send candidates with a Candidate Home account requests to:

- Complete questionnaires.
- Provide additional information.
- Schedule, reschedule, or cancel an event.
- Sign electronic documents.
- Upload government or national IDs.
- Take assessment tests.

Workday uses the most recent language that the candidate selects in the Language field on their account settings to determine their preferred language for communications.

Steps

1. Access the Edit Tenant Setup - Security task.

   Configure tenant-wide password requirements.

   See Reference: Edit Tenant Setup - Security.

2. Access the Edit Tenant Setup - Recruiting task.

   To prevent email delivery issues, Workday recommends selecting the Require Candidate Home Account check box. If you don't select this check box, Workday selects the Enable Candidate Verification Email check box to restrict application data to the candidate.

   a) (Optional) Select the Require Candidate Home Account check box and enter an Account Creation Consent Message.
   b) Select the Enable Candidate Verification Email check box.

   See Reference: Edit Tenant Setup - Recruiting.
3. Edit Domain Security Policies.

   Configure the security policy for the *Manage: Candidate Account* domain in the Recruiting functional area.
4. Create External Career Sites on page 379.

   a) In the Apply - Terms and Agreement section, enter an Apply Confirmation Message.
   b) Complete the Candidate Home section.

Result

Workday automatically assigns candidates who create a Candidate Home account to the *Candidate as Self* security group.

Next Steps

Use the Manage External Accounts task to perform these actions on external accounts in bulk:

- Lock accounts.
- Reset passwords.

Merge 2 candidates who have separate Candidate Home accounts, as long as neither candidate has a complete *Job Application* event. Workday sets the email address of the most recent candidate record as their Candidate Home username.

Related Information

Concepts

Concept: User Accounts for External Sites

Tasks

Manage External Accounts

Reference

The Next Level: To Require or Not to Require - The Candidate Home Debate

Steps: Configure External Career Site Sidebars

Context

You can configure sidebar panels to display on the Search for Jobs and Candidate Home pages of your external career sites. Sidebars enable you to provide applicants with additional information about your organization. You can configure additional sections that include a combination of these components:

- A Prospect Introduce Yourself shortcut (on Search for Jobs page only)
- Images
- Rich Text
- Videos

Note: You must have a valid Workday Media Cloud contract before you can upload videos. See: Workday Community: Media Cloud.

You can also configure job post template-specific sidebars that only display when users view jobs.

Steps

1. Create sidebar configurations.

   Access 1 of these tasks:

   - Create Sidebar Configuration.
   - Edit Sidebar Configuration.
   - Copy Sidebar Configuration.

   Avoid using nonbreaking spaces to control the spacing and flow of text. Consider manually entering text to avoid copying and pasting in unsupported HTML characters that can impact how content displays.

   Security: *Set Up: Career Sites* domain in the Recruiting functional area.
2. Access the Edit External Career Site task.

   Select the sidebar configuration from the:

   - Default Sidebar prompt in the Branding section for the sidebar to display on the Search for Jobs page.
   - Sidebar prompt in the Candidate Home section.
3. Create Job Posting Templates on page 416.

   You can configure the job posting template content with a different sidebar that displays when users click a job from the search results page.

Result

Changes to sidebar configurations that are in use on a published external career site are effective immediately.

Related Information

Reference

2022R2 What's New Post: Welcome Page for Candidate Home

2021R2 What's New Post: External Career Site Search Experience and Job Details

Steps: Add Location Hierarchy Facets to Find Jobs

Context

You can configure the Find Jobs report that displays on external and internal career sites to include 2 additional location hierarchy subtype facets.

Example: You might want to see job postings according to these location hierarchy subtypes:

- Geographic region
- Product line

There's no limit on the location hierarchy subtypes you can configure. You can also configure different types for different external career sites.

Steps

1. Access the Maintain Organization Subtypes task.

   Create a new organization subtype. Example:

   - Organization Subtype Name: Product
   - Organization Type(s): Location Hierarchy

   Security: *Set Up: Organization* and *Committee Definition: Set Up* domains in the Organizations and Roles functional area.

2. Create Location Hierarchies.

   Associate a location hierarchy with the organization subtype. Example:

   - Name: Electronic Games
   - Subtype: Product
3. From the related actions menu of the location hierarchy, select Reorganization > Assign Locations.

   Associate locations to the location hierarchy. To see facet results on the Find Jobs report after completing this setup, you must have at least 1 job posting associated with the locations mapped to this location hierarchy.

   Security: *Manage: Organization Edit and Reorganization Action* domain in the Organizations and Roles functional area.
4. Access the Edit Internal Career Site task.

   To use the location hierarchy as a facet on Find Jobs, select it on the Location Hierarchy Subtype 1 or Location Hierarchy Subtype 2 prompt. Example: Location Hierarchy Subtype 1: Product.

   For immediate results, we recommend testing new facets using your internal career site.

   Security: *Set Up: Career Sites* domain in the Recruiting functional area.
5. Access the Edit Internal Career Site for Non-Workers task.

   To use location hierarchy as a facet on Find Jobs, select it on the Location Hierarchy Subtype 1 or Location Hierarchy Subtype 2 prompt for a specific type of internal career site for nonworkers. Example: Location Hierarchy Subtype 1: Country.

   Security: *Set Up: Career Sites* in the Recruiting functional area.
6. Copy the Find Jobs standard report.
   a) Click the Advanced profile group.
   b) In the Facet Options section, add *Location Hierarchy 1* as a Facet Filter.
   c) Add a Label Override. Example: Product Area
   d) Add or remove other facet fields as needed.
   e) Run the report.
   f) Repeat these steps if you want to add additional location hierarchy facets on the copy of your internal Find Jobs report.

   Security: *Internal Careers* domain in the Recruiting functional area.
7. Access the Edit External Career Site task.

   Select the location hierarchy on the Location Hierarchy Subtype 1 or Location Hierarchy Subtype 2 prompt. Example: Location Hierarchy Subtype 1: Product.

   Wait 2 hours for Workday to index the entries.

   Security: *Set Up: Career Sites* domain in the Recruiting functional area.
8. Copy the Find Jobs Template for External Career Sites standard report.
   a) In the Search Results tab, don't change anything.
   b) In the Share profile group, select the *Share with all authorized users* option in the Report Definition Sharing Options section.
   c) In the Facet Options section of the Advanced tab:

      - Select the Enable As Web Service check box.
      - Add the Location Hierarchy 1 or Location Hierarchy 2 fields in the Facet Filters grid and enter a Label Override.

   Security: *Set Up: Career Sites* domain in the Recruiting functional area.

9. Access the Edit External Career Site task.

   In the Job Details section, select the report you created in step 7 on the Find Jobs Custom Report prompt.

   Security: *Set Up: Career Sites* domain in the Recruiting functional area.
10. (Optional) Update the Find Jobs report for internal career sites.
    a) Access the Edit Internal Career Site task and complete Location Hierarchy Subtype 1 or 2.
    b) Copy the Find Jobs report.

    Security: *Set Up: Career Sites* domain in the Recruiting functional area.

Result

The Find Jobs report used on the external career site reflects the changes you made.

Related Information
Tasks
Steps: Create Search Reports
Reference
Workday 31 What's New Post: Internal Apply for Non-Workers

Steps: Set Up Internal Recruiting

Prerequisites

- Create job posting templates.
- Configure the *Manage Internal Career Apply* business process.

Context

Workday enables you to create 1 internal career site to source talent from within your organization or company. When you post jobs for your employees, they can:

- Add jobs to their job interests on their worker profile.
- Apply for jobs and track their applications.
- Review their upcoming scheduled recruiting events.
- Refer other candidates.
- Share job postings on their social media profiles.

Steps

1. Edit Domain Security Policies.

   Configure the security policy for the *Internal Careers* domain in the Recruiting functional area to enable workers to find and apply for jobs, or to withdraw their application.
2. Edit Business Process Security Policies.

   Add the Employee As Self security group to the *Manage Internal Career Apply* business process security policy.
3. Access the Create Internal Career Site task.

   Create an internal career site for your employees.

   Security: *Set Up: Career Sites* domain in the Recruiting functional area.
4. Set up Jobs Hub.

   See Steps: Set Up Jobs Hub on page 372.

5. Steps: Set Up Profiles and Profile Groups.

   Add the My Job Applications report to the Career, Job, or Personal profile group of the worker profile.
6. (Optional) Access the Hide Workday Delivered Report task.

   Note: When you hide standard reports, Workday doesn't display them in searches. If you can't find a specific report, access the Hide Workday Delivered Report task to determine if you or another administrator hid it.

   - We recommend you hide the My Job Applications and old My Applications standard reports and use the newer My Applications report instead.
   - If you use a custom report named Find Jobs, hide the Find Jobs report that redirects workers to the Browse Jobs report from global search. You can select this specific report from the Recruiting prompt category. Hiding this report enables workers to access your custom report in global search without being redirected.

   Security: *Set Up: Tenant Setup - General* domain in the System functional area.
7. (Optional) Hide or Require Optional Fields.

   From the By Functional Area prompt, select:

   - *Manage Internal Career Apply* to configure which fields are hidden or required on internal job applications.
   - *My Applications* to hide any columns from the report as needed.
8. (Optional) Steps: Set Up Internal Job Alerts on page 373.

   Create job alerts templates and enable employees to create, manage, edit, and delete their job alerts.
9. Create Internal Career Sites for Non-Workers on page 386.

   Create internal career sites for contingent workers and students to access.
10. Create a custom dashboard for your contingent workers and students to access.

    See Example: Create Career Dashboard for Non-Workers on page 388.

Next Steps

Post jobs to your internal career site.

Related Information
Reference
2023R1 What's New Post: Internal Mobility

Steps: Set Up Jobs Hub

Context

Jobs Hub provides employees a single place to access:

- Job alerts.
- Job postings.
- Their applications and relevant tasks.
- Their referrals.
- User-configured Quicklinks.

Steps

1. Access the Configure Home Page Content task.

   Add the Jobs Hub worklet to the Workday Home page menu.

   Security: *Set Up: Tenant Setup - Worklets* domain in the System functional area.

2. Set Up Hubs.

   Configure Jobs Hub and customize its:

   - Name.
   - Announcements.
   - Navigation items.
   - Suggested links.
   - Sections and cards.

   Security: *Set Up: Tenant Setup - Hub* domain in the System functional area.
3. Edit Domain Security Policies.

   Configure employee access to the *Self-Service: Career Alerts* domain in the Career and Development Planning functional area and these domains in the Recruiting functional area:

   - *Employee Referrals*
   - *Self-Service: My Applications*

Next Steps

If you configured Opportunity Marketplace or Career Hub, you can add the Manage Job Alerts and My Referral Activity reports as Quick Links.

Related Information

Concepts

Setup Considerations: Career Hub on page 1543
Setup Considerations: Talent Marketplace on page 1569

Steps: Set Up Internal Job Alerts

Prerequisites

Security: *Self-Service: Career Alerts* domain in the Career and Development Planning functional area.

Context

Employees can create custom job alerts and directly apply to internal job opportunities that interest them. When you configure internal job alerts, your employees can:

- Create, manage, edit, and delete job alerts.
- Access job alerts from Jobs Hub and internal job postings.
- Receive job alerts through email, push notification, and Workday Notifications.

Steps

1. Edit Domain Security Policies.

   Configure these domains:

Domain	Description
Reports: Job Alerts in the Recruiting functional area.	This domain controls access to the Job Alert Preferences for All Candidates report data source and the Job Alert Insights report.
Set Up: Message Template in the System functional area.	Configure to have a segment-based security group with Edit access. Give the segment-based security group access to the Job Alerts for Internal Candidates notification type security segment.

2. Access the Edit Tenant Setup - Notifications task.
    a) In the Mobile App Notification Settings section, select these check boxes:
        - Enable Apple Push Notifications
        - Enable Google Cloud Messaging
    b) In the Recruiting notification category, select a routing rule and enable delivery settings for email and push notifications.

        Workday recommends configuring a unique routing rule on the Job Alerts - Internal Candidates notification type by enabling the Override Parent Notification Type Settings check box in the Recruiting parent notification type. Internal job alerts use the notification settings on the parent routing rule unless you override it.

        See: Reference: Edit Tenant Setup - Notifications.
3. Create Email Templates.

    From Email Template Behavior, select Job Alerts to define the branding elements, layout, and content for your custom internal job alerts email template.
4. Access the Maintain Email Templates task.
    - Activate the custom email template.
    - Select a default email template, if you've more than 1 template.
5. Access the Create Message Template task.

    Create a message template with the Job Alerts – Internal Candidates notification type. You can use the Job Alert Name and Job Alert Links merge tags to personalize job alerts and include links to the job postings.

    See: Steps: Set Up Message Templates.
6. Copy Reports.
    a) Copy the Find Jobs standard report to create a custom report with these values:

Prompt	Value
Data Source	Select Job Posting Anchor.

Prompt	Value
Data Source Filter	Select Approved Job Posting Anchor.

b) On the Advanced tab, add job alerts-specific facets in the Facet Options section.

These facets determine the filters workers can use when creating or editing their job alerts.

Workday supports only these job alerts filters:

- Company
- Full/Part-time
- Hiring Manager
- Job Families
- Job Family
- Job Posting Employee Contract Type
- Job Profiles
- Job Type
- Location Country
- Location Hierarchy 1
- Location Hierarchy 2
- Location Region/State/Province
- Locations
- Management Level
- Organization
- Primary Location
- Skills
- Work-Study
- Work Shift

7. Set up Jobs Hub.

   See Steps: Set Up Jobs Hub on page 372.
8. Access the Edit Internal Career Site task.

   As you complete the Job Alerts section, consider:

Option	Description
Enable	Select to enable internal candidates to create job alerts.
Message Template	Select the message template that you created to enable standardized messaging for internal candidate job alerts.
Override Email Template	Select an email template to override the default job alerts email template.
Override Find Jobs Report for Job Alerts Filters	Select the custom report whose facets that you modified earlier. If you don't select a custom report, the job alert filters use the facets on the Find Jobs report.

Result

Employees can now create and customize their job alerts when searching for jobs internally or viewing a job posting. Workday processes sending job alerts at:

- 4:00 AM PST for the daily frequency.
- 9:00 AM PST for the weekly frequency.

Next Steps

You can access the Job Alert Insights report to view the status of job alerts.

Steps: Hide Similar Jobs on an Internal Career Site

Prerequisites

Security: *Internal Recommended Jobs* domain in the Recruiting functional area.

Context

You can hide the Similar Jobs section on the View Job Posting Details report of an internal career site from specified security groups. Candidates in those security groups can then focus solely on referred jobs.

Steps

1. Edit Domain Security Policies.

   Edit permissions on the *Internal Recommended Jobs* domain in the Recruiting functional area to exclude selected security groups.
2. Activate Pending Security Policy Changes.

   Enter a comment about the security changes.

Steps: Set Up Notifications for Candidate Home Tasks

Prerequisites

Create an email template for external candidates.

Context

When external candidates have tasks to complete on Candidate Home, you can configure notifications that inform them of the tasks. In some cases, however, candidates might not have Candidate Home accounts, such as when:

- An agency submits the candidate.
- A recruiter creates a prospect and then creates a job application for the candidate.
- A data migration of candidate records occurred.

To send Candidate Home task notifications to external candidates:

- Create a condition rule that identifies if candidates have a Candidate Home account.
- Create 2 messages: 1 for candidates with a Candidate Home account and another for candidates without an account.

Steps

1. Access the business process where candidates must complete a task. Example: *Offer* or *Screening*.
2. Identify the step in which to send a notification.

   Example: *Review Documents* or *Change Personal Information*.
3. Disable Workday-generated business process notifications for the step.
   a) Click Notifications.
   b) Click Maintain System Notifications.
   c) Click OK.
   d) Click the Disabled check box for the step.

4. Create Custom Notifications.

   Create 2 notifications for the business process. As you complete the task, consider:

Prompt	External Candidate with a Candidate Home account.	External Candidate without a Candidate Home account.
Overall Email Template	Select a template.	Select a template.
Don’t Include Notification Details Link	*Yes.*	*Yes.*
Triggers	*On Entry.*	*On Entry.*
Conditions and Rules	Leave blank until you create the conditions and rules.	Leave blank until you create the conditions and rules.
Recipient	Candidate.	Candidate.
Message Content	Include the *External Site Task Link* report field in the body of the message.	Include the *Create Candidate Home Account URL* in the body of the message.

5. Create Business Process Condition Rules.

   Create 2 condition rules for the notifications. As you complete the task, consider:

Source External Field or Condition Rule	Relational Operator	Candidate Home Status
Valid for Candidate Account Creation	*Is blank*	Candidate has a Candidate Home account.
Valid for Candidate Account Creation	*Is not blank*	Candidate doesn't have a Candidate Home account.

6. Add the appropriate Rules and Conditions to the new notifications.

Related Information
Concepts
Concept: User Accounts for External Sites

Enable Social Sign in for Candidate Accounts

Prerequisites

Set up external career sites.

Context

When you enable Social Sign In for candidate accounts on your external career sites, external candidates can use their Google or Apple accounts to create candidate accounts and apply for jobs in your organization. This is a tenant-level setting and applies to all of your external career sites.

Steps

1. Access the Edit Tenant Setup - Recruiting task.

   From the Candidate Social Sign-In Providers list, select the providers that you want candidates to use to create accounts.

   Example: Google and Apple.

2. Enter the message for candidates in the Candidate Social Sign-In Consent Message field.

   This message should explain that the candidate is giving user consent by using their social account for account creation. The message appears above the social sign in options when candidates sign into the external career site.
3. Wait for the Register SSO Client background job to complete.

   This can take up to 24 hours.

Result

Candidates can use the specified providers to create accounts on your external career sites.

Related Information
Concepts
Concept: Social Sign In for Candidate Accounts on page 365

Populate Job Applications with LinkedIn Profile

Prerequisites

An agreement with LinkedIn for LinkedIn Recruiter or Job Slots.

Security: These domains in the Recruiting functional area:

- *Set Up: Recruiting*
- *Set Up: External Career Site Access*

Context

Workday enables candidates to use their LinkedIn profile to quickly fill in their job applications. This saves time by reusing information they have already entered in LinkedIn.

Steps

1. Access the Edit Tenant Setup - Recruiting task.
2. Click the Configure LinkedIn Integrations button.
3. On the Integration System User for LinkedIn Integration prompt, select the integration system user (ISU) that you created.

   This page is required for the LinkedIn RSC One-Click Export integration and not needed for Apply with LinkedIn.
4. Click OK.
5. On the Terms and Conditions Agreement page select the I Agree check box.
6. Click OK.
7. Sign into your LinkedIn account.
8. Click OK and Done.

   Once logged into LinkedIn, click Request next to Apply with LinkedIn.
9. Access the Create External Career Site or Edit External Career Site task.
10. In the Apply - Social Profiles section, select the Enable Apply with LinkedIn check box.

Result

When applying through an external career site, candidates can use the Apply with LinkedIn or Sign In to LinkedIn buttons to submit their applications. When candidates sign into their LinkedIn account, Workday automatically populates these fields on their job application with details from their LinkedIn profile:

- Country

- Contact Information
- Education
- Experience
- Skills

Populate Job Applications with SEEK Profiles

Prerequisites

Obtain a license agreement with SEEK and a SEEK Advertiser ID.

Context

Workday enables candidates to use information from their SEEK profile to populate information in their job applications. Using their SEEK profile enables candidates to save time by using information they have already entered in SEEK.

Steps

1. Access the Create or Edit Career Sites tasks.
2. Select the Enable Apply with Seek check box.
3. Enter your SEEK Advertiser ID.

Result

When candidates apply for a job using an external career site, they'll see an Apply with SEEK button. SEEK will request the candidate to authorize access to their profile. Workday automatically populates job applications with these fields from their SEEK profile:

- Achievements
- Company Name
- Description
- Email Address
- End Date
- Experience
- First Name
- Job Title
- Last Name
- Phone Number
- Skills
- Start Date
- Work History

Create External Career Sites

Prerequisites

- Set up veteran statuses for Recruiting.
- Create a message template.
- Security: These domains in the Recruiting functional area:
    - *Candidate Data: Personal Information*
    - *Set Up: Career Sites*
    - *Set Up: External Career Site Access*
    - *Set Up: Site Branding*

Context

You can create 1 to 100 active external career sites to support specific:

- Countries or locations.
- Population groups, such as college graduates.

When you create an external career site, you can:

- Brand it with your company logo or embed it into another website.
- Define sections that candidates must complete when they apply for a job.
- Integrate it with your social media recruiting outlets.
- Add a Prospect Introduce Yourself page to branded external career sites. Prospective candidates can submit information without signing in or applying to a specific job. The submission creates a prospect record. When the prospect uploads a resume, Workday parses contact information, education, and experience, which becomes part of the prospect record.

Steps

1. Access the Create External Career Site task.
2. As you complete the task, consider:

Option	Description
ID	Enter a unique alphanumeric identifier that becomes part of the URL. Workday converts spaces to dashes.
Languages	When you select more than 1 language, Workday displays the external career site in English and allows candidates to choose another language from the ones you selected. If you configure a Native Country Name on the Maintain Workday Delivered Country Names task, Workday displays the custom name on the external career site when candidates choose a language option. You can select a non-US English language option to enable candidates outside the United States enter dates in the DD/MM/YYYY and YYYY/MM/DD formats. Example: Selecting English (United Kingdom) will display the Date of Birth as 02/12/2025. Workday defaults locales based on browser settings and these predefined mappings: • Preferred language browser settings for Ireland, India, New Zealand, Singapore, Australia, and Hong Kong are mapped to English (United Kingdom). • Preferred language browser settings for South Africa are mapped to English (Canada). • All other preferred language browser settings map to English (U.S.).

Option	Description
Embed Mode	Embed mode enables you to display your external career site within another page, which offers flexibility regarding customization. Note: If you enable embed mode, you're allowing other sites outside of Workday-delivered domains to host your external career site within their pages. This can be done by third parties with or without your consent. This means you’re incurring the risk of exposing your users to social engineering scams such as phishing. As a result, users can be misled into performing unwanted actions on your career site. We advise that users should be educated on basic internet safety, as well as which third-party websites they can expect to see with your job postings or other career site-related information. When you enable embed mode, these items don't display on the embedded page: • Follow Us icons. • Privacy Policy link. • Prospect Introduce Yourself link, which you can add manually. Embed mode doesn't support LinkedIn applications. Note: Users with these browsers might not be able sign in or complete applications because they block third-party cookies by default: • All browsers on iPhone and iPad devices. • Safari on desktop. Workday recommends that you include instructions for impacted users so they know how to adjust browser settings.

3. The EU Cookie Policy section includes a Cookie Display Notice.

   When you select *Show only in limited time zones*, the notice displays for users who set their local time for 1 of these time zones:

   - UTC
   - UTC+1
   - UTC+2
   - UTC+3
4. As you complete the Tracking and Analytics section, consider:

Option	Description
Google Analytics Tracking ID	Workday accepts IDs from Google Universal Analytics (UA) and Google Analytics 4 (GA4).

Option	Description
	You can configure 1 Tracking ID type for each external career site.
Tracking Pixels	To count completed applications, enter the URL of an image pixel tracker. If you configure multiple tracking pixel URLs, each must have a unique URL. Workday doesn't support these URL types: • HTML • Image tags • JavaScript Work with your third-party vendors to get a URL that meets Workday's requirements. Depending on the vendor, you might need to: • Complete additional steps to set up conversion tracking in a third-party application. • Wait for a period of time before you can report on conversion data. • Omit unnecessary attributes from the image tag that contains the URL. Example: If the vendor gives you this tag, only enter. *https://ExampleURL.com/pixeltracking.gif*: `<img height="1" width="1" src="https://ExampleURL.com/pixeltracking.gif">`

5. As you complete the Branding section, consider:

Option	Description
Published Brand	You can use the Create Brand task to configure branding settings then select brands from this prompt.

6. In the Chatbot Configuration section, enter the Paradox Chatbot widget token to enable the chatbot on your external career site.

   This step only applies if you have:

   - A Paradox AI license.
   - Connected Paradox AI and Workday using the Paradox integration.
   - Obtained a widget token from Paradox. You need a unique token for each external career site that you want to enable the chatbot for.

7. As you complete the Prospect Introduce Yourself section, consider:

Option	Description
Header Link Text and Page Title	Workday recommends entering fewer than 25 characters. If you edit text in this field later, the page URL won’t change. The format for the direct link to the Prospect Introduce Yourself page is *[External site URL]/introduceYourself*.
Require Email Address	Select to require an email address.

Option	Description
Require Phone Number	Select to require a phone number.
Require Resume Attachment	Select to require prospects to attach a resume.
Enable Skills	You can use this check box to enable prospects to select skills when they fill out the Prospect Introduce Yourself form. If you enable Skills Cloud, Workday automatically displays suggested skills.
Default Opt-in Terms and Conditions	Default terms and conditions are specific to the Prospect Introduce Yourself page. Enter terms and conditions that display when you don't configure Opt-in Terms and Conditions by Country.
Opt-in Consent	Text that you enter in the Opt-in Consent field displays next to the consent check box.
Auto-Append Source	You can select 1 source, which applies to all submissions for the site.
Auto-Tag to Candidate Pool	Tag up to 50,000 prospects to candidate pools. When you reach the limit, Workday no longer adds prospects to the pool but continues to create a prospect record. The pools apply to all submissions for the site. If you anticipate over 50,000 submissions and don't have a process to move prospects from the selected pool into another, Workday recommends that you don't use this feature.
Auto-Tag with Candidate Tag	The tags apply to all submissions for the site.
Confirmation Message for Direct Links	Enter a confirmation message that displays: • When prospects access the Prospect Introduce Yourself page from a direct link (other than the header link). • If the Hide Search for Jobs Link is selected in the Branding section. Otherwise, Workday displays the confirmation message on the job search page.

8. As you complete the Job Alerts section, consider:

Option	Description
Enable	Select the check box to allow prospects and candidates to specify search criteria to create job alerts in Candidate Home.
Message Template	Select the message template you created for standardized job alert emails.
Notification Template	Select a Notification Designer template to customize the branding for job alerts emails.

9. As you complete the Job Details section, consider:

Option	Description
Location Hierarchy Subtype 1 and Subtype 2	Select additional location-related subtypes to use as facets on the Find Jobs report. It can take up to 2 hours for Workday to make facets available.
Find Jobs Custom Report	Select the custom report that you want to use to display jobs on this external career site. Custom reports must be: • Based on the Find Jobs Template for External Career Sites report. • Shared with all authorized users. • Web service enabled. Workday doesn't recommend changing the XML alias for these report fields as it can impact the filtering and placement of icons: • Any of the Location fields. • Date Posted • Distance • Time Type When you leave this field blank or Workday detects a problem with the selected custom report, the external career site uses the Find Jobs report.

10. As you complete the Apply - Intro section, consider:

Option	Description
How Did You Hear About Us?	When you configure more than 1 source, Workday displays the How Did You Hear About Us? prompt on the job application. If candidates select a source mapped to 1 of these Workday-delivered sources, they can identify the worker who referred them: • *Employee Referral* • *Proxy Referral* • *Self-Identified*
Recruiting Sources for Auto-Tracking	Assign 1 or more recruiting sources for this career site. When a candidate applies through a URL with a reference ID for 1 of these sources, Workday hides the How Did You Hear About Us? prompt on the job application.
Resume Parsing Message	Replace the standard message on the Quick Apply page of the job application.

11. In the Apply - Background section, enter social network types that candidates can select.

    Workday supports Facebook, Glassdoor®, LinkedIn, Twitter, and YouTube in this section.

12. In the Apply - Previous Worker section, select the Enable Previous Worker Verification check box.

    Select options from the Field prompt on the Previous Worker Questions grid to collect information on candidates who previously worked at the company. If you enable the previous worker verification, the View Application action in Candidate Home displays Are you a previous worker? as the section name and first question.

13. As you complete the Apply - Terms and Agreement section, consider:

Option	Description
Provider	Select the provider that you want you use to configure terms and conditions in Workday. Integrate with a third-party vendor for alternative configuration options.
Hosted Web Form Link	Enter the OneTrust Collection Point URL to integrate the web form hosted by OneTrust.
Terms and Conditions by Country	Add 1 or more countries on the grid and enter terms and conditions for each country.
Candidate Consent	Enter a message for when candidates consent to terms and conditions. Workday automatically includes a check box for the candidate consent message.
Apply Confirmation Message	Replace the standard confirmation message that displays when candidates submit job applications. You can configure 1 message for the entire career site. Workday recommends that you use 200 characters or fewer.

14. (Optional) Complete the Apply - Voluntary Self Identify Disability (US Only) section.
    a) To display the Voluntary Self-Id Disability Form (CC-305), select the Include Voluntary Self-Identification of Disability check box.
    b) To require that external candidates complete disability information, select the Require Completion of Voluntary Self-Identification of Disability check box.
15. In the Apply - Inline Assessment section, add instructions that display on the Take Assessment task.
16. As you complete the Candidate Home section, consider:

Option	Description
Enable Delete My Information	When you select this check box, the Delete My Information Message and Delete My Information Confirmation Message fields populate.
Withdraw Confirmation Message	Enter text that candidates will review before withdrawing their application from your company.
Delete My Information Message	Enter text that candidates will review before submitting a request for your company to delete their information.
Delete My Information Confirmation Message	Enter text to display after candidates confirm that they want your company to delete their information.

Result

If you enable the Paradox AI chatbot, job seekers can converse with the chatbot on your external career site to receive job suggestions and assistance with completing job applications.

Next Steps

Add or update personal and contact information for external candidates from their candidate profile.

Publish your brands to your external career sites using the View All Brands report. You can edit your brands on the Edit Brand task.

You can use the Delete External Career Site task to delete an external career site. You can only delete unused sites and can't delete sites that have been used for job postings.

Related Information

Concepts

Concept: User Accounts for External Sites

Tasks

Create Job Posting Templates on page 416

Maintain Recruiting Sources on page 272

Steps: Set Up Message Templates

Reference

Workday 32 What's New Post: Configurable Downtime URL

2020R1 What’s New Post: Prospect Introduce Yourself on External Career Sites

2024R1 What's New Post: Paradox AI Chatbot for External Career Site

The Next Level: Previous Worker Questions and Adding Responses to the Candidate Grid

2020R2 What’s New Post: Resume Parsing for Prospect Introduce Yourself

External Career Site Cookies FAQ

2021R2 What's New Post: External Career Site Search Experience and Job Details

Reference: Custom Events in Google Analytics 4 on page 389

2023R1 What's New Post: External Career Site Consent Collection Through Third Parties

2024R1 What's New Post: Skills Cloud for Candidate Pools and Prospect Introduce Yourself

Create Internal Career Sites for Non-Workers

Prerequisites

Security: Configure these domains in the Recruiting functional area:

- *Candidate Data: Job Application*
- *Self-Service: Candidate*
- *Self-Service: My Applications*
- *Set Up: Career Sites*

Context

Workday enables you to create internal career sites for nonworkers who have Workday accounts to search and apply for jobs. Nonworkers can be:

- Contingent workers
- Extended enterprise learners
- External students

When you create an internal career site for nonworkers, you can define the sections that candidates must complete when they apply for a job.

You can configure internal career sites for nonworkers to enable you to:

- Reduce duplicate candidate records for nonworker applications.
- Provide an easy apply flow within Workday.
- Manage different job postings with separate nonworker career sites.

Steps

1. Access the Create Internal Career Site for Non-Workers task.
2. As you complete the task, consider:

Option	Description
Location Hierarchy Subtype 1 Location Hierarchy Subtype 2	Select additional location-related subtypes to use as facets on the Find Jobs report. It can take up to 2 hours for Workday to make facets available.
Recruiting Source	You can't map more than 1 custom source to the same Workday-delivered source.
Inactive	You can make the site inactive. Candidates will be able to see the site but can't apply.
Withdraw Confirmation Message	This message displays to candidates on the Withdraw Application confirmation page when they withdraw their job application.

3. (Optional) Complete the Apply - Personal Information (U.S.) section if job requisitions on the internal career site for nonworkers are in the United States of America.

   Add fields on the Personal Information - U.S. grid to collect from candidates when they apply to job requisitions in the United States of America.
4. (Optional) Complete Apply - Personal Info (Non-U.S.) section if job requisitions on the internal career site for nonworkers aren't in the Unites States of America.
   a) Add 1 or more countries and personal information fields on the grid for Personal Information - Non-U.S.
   b) Add 1 or more fields for Personal Information Question Text Override - Non-U.S. and enter question text for each field.
5. (Optional) Complete the Apply - Voluntary Self Identify Disability (US Only) section.
   a) To display the Voluntary Self-Id Disability Form (CC-305), select the Include Voluntary Self-Identification of Disability check box.
   b) To require that internal non-workers complete disability information, select the Require Completion of Voluntary Self-Identification of Disability check box.
6. Complete the Apply - Terms and Agreement section.
   a) Enter text to display in the Default Terms and Conditions section on the job application.

      Workday automatically includes a check box for the candidate consent.
   b) Add 1 or more countries on the grid Terms and Conditions by Country and enter terms and conditions for that country.

   You can replace the standard confirmation message that displays when a candidate submits their job application in the Apply Confirmation Message field. You can only configure 1 message for the entire career site. Workday recommends that you use 200 characters or fewer.

   You can use these report fields to create custom reports for Terms and Conditions:

   - Candidate Terms and Conditions Consent
   - Job Application Language
   - Terms and Conditions for Job Application
   - Terms and Conditions Lock Date

Result

Related Information

Reference

Workday 31 What's New Post: Internal Apply for Non-Workers

Example: Create Career Dashboard for Non-Workers

This example illustrates how to create a custom dashboard for a group of non-workers to provide them access to internal job postings on the Workday browser application.

Context

You want to create a custom dashboard for students to provide them with quick access to a custom Find Jobs for Students report that was previously accessible on the Career worklet. You can make this custom dashboard a required worklet on the Home page for students to make it more accessible.

Prerequisites

- Create a custom Find Jobs for Students report for students.
- Security: The *Set Up: Tenant Setup - Worklets* domain in the System functional area.

Steps

1. Access the Create Custom Dashboard task.
2. In the Dashboard prompt, enter *Student Careers*.
3. Click OK.
4. Enter these values:

Field	Enter
Domains	• *Business Process Administration* • *Internal Careers* • *Security Administration* • *User-Based Security Group Administration*
Description	*A career dashboard for students to search for and apply to job opportunities.*
Dashboard Icon	*Career*

5. Click OK.
6. From the related actions menu of the Student Careers dashboard, select Dashboard > Edit.
7. Click Add.
8. Enter *Careers* in the Tab Name field.
9. Click the Menu section to expand it.
10. In the Menu Sections grid, add a row to add a new section. and enter these values:

Section Label	+	Item
Find Jobs	Click +	From the Custom Report prompt, select: *Find Jobs for Student*

11. Click Done.
12. On the Maintain Dashboards task, click the Dashboard column and enter *Home*.
13. Click Filter.
14. Click Edit.

15. Click the Worklets section on the Content tab.
16. In the Dashboards/Worklets grid, add a row and enter these values:

Worklet	Required for Groups	Required
Student Careers	*All Students*	Select the check box.

17. Click Done.

Reference: Custom Events in Google Analytics 4

Workday delivers custom events and parameters for tracking external career site metrics in Google Analytics 4. You can track these items when you add your Google Analytics tracking ID to your external career site.

Job Search and Facet Usage

Custom events and parameters for job search and facet usage.

Event Name	Description
facet_filter	Candidate selects a value from a facet filter.
search	Candidate enters a search term.
view_job_posting	Candidate views a job posting.
view_search	Candidate views the Search for Jobs page.

Parameter Name	Description
facet_name	Included in facet_filter events.
facet_value	Included in facet_filter events.
job_posting_id	Included in view_job_posting and the Workday delivered custom apply flow events.
search_term	Included in search events.

Apply Flow

Custom events and parameters for apply flow pages. Events listed in apply flow order.

Event Name	Description
apply_login	Candidate asked to sign in or create an account.
apply_start	Candidate begins the job application process.
apply_autofill_with_resume	Candidate lands on page to autofill application with a resume.
apply_my_information	Candidate lands on the My Information page.
apply_my_experience	Candidate lands on the My Experience page.
apply_personal_information_agreement	Candidate lands on the Voluntary Disclosures page.
apply_self_identify	Candidate lands on the Self Identify page.
apply_assessment	Candidate launches the Assessment page.

Event Name	Description
apply_primary_questionnaire	Candidate lands on Application Questions 1 of 2 page.
apply_secondary_questionnaire	Candidate lands on Application Questions 2 of 2 page.
apply_supplementary_questionnaire	Candidate lands on Supplementary Questionnaire page.
apply_review	Candidate lands on the Review page.
apply_job_application_submitted	Candidate successfully submits a job application.

Parameter Name	Description
apply_method	Included in the apply_start event, and indicates the method that the candidate selected to apply.

Candidate Lifecycle

Custom events for candidate lifecycle events.

Event Name	Description
sign_up	Candidate creates an account on the career site.
login	Candidate logs into the career site.

Troubleshooting: External Career Sites

This topic provides strategies for diagnosing and resolving these external career site problems:

- External career site is down or failing to load. on page 390
- Users are unable to sign in or complete applications. on page 391

External career site is down or failing to load.

Cause	Solution
Career site isn't published.	Security: *Set Up: Career Sites* domain in the Recruiting functional area. 1. Access the Edit External Career Site report. 2. Ensure that the Publish Site check box is selected.
The Recruiting System account is disabled, expired, or locked.	For disabled or expired accounts: Configure the *Edit Workday Account* business process and security policy in the System functional area. 1. Access the Edit Workday Account task. 2. Select *Recruiting System*. 3. Clear the Account Disabled check box and Account Expiration Date fields. For locked accounts:

Cause	Solution
	Security: *Lock Out Workday Accounts* domain in the System functional area. 1. Access the Manage Workday Accounts task. 2. Click the *Unlock Workday Accounts* option. 3. Select *Recruiting System* from the Include Selected Workday Accounts prompt.
Recruiting System isn't excluded from any current session restrictions.	Security: *Security Administration* domain in the System functional area. 1. Access the View Workday Maintenance Window History report to see if a session restriction is in progress. 2. Access the Manage Workday Maintenance Window task. 3. Click *System Accounts Excluded from Session Restriction* and select *Recruiting System*.

Users are unable to sign in or complete applications.

Cause: Embed mode is enabled for the external career site. Users with these browsers might run into issues because they block third-party cookies by default:

- All browsers on iPhone and iPad devices.
- Safari on desktop.

Solution: Provide text that mentions that browsers on iOS devices and Safari on desktop might block third-party cookies by default, preventing the career site from working properly. You can include this text where you link to the external career site or somewhere visible on the page with the embedded site.

Candidate Engagement

Recruiting Campaigns

Steps: Set Up Recruiting Campaigns

Prerequisites

See 2022R2 What's New Post: Recruiting Campaigns.

Context

You can set up message and notification templates that enable recruiters to send branded marketing communications to pools of prospects or candidates. The emails can include links to job postings. You can also configure an analytics discovery board so recruiters can view engagement metrics and conversion rates for job applications submitted by campaign recipients.

Steps

1. Enable the Candidate Engagement functional area.

   See Steps: Enable Functional Areas and Security Policies.
2. Edit Domain Security Policies.

   Configure the *Manage: Recruiting Campaigns* domain in the Candidate Engagement functional area.

3. Set up email analytics for the Recruiting Campaigns notification type in the Candidate Engagement service.

   See Steps: Set Up Email Analytics.
4. Ensure recruiters who manage campaigns can view candidate pools.

   See Steps: Set Up Candidate Pool Security on page 245.
5. Create templates with Notification Designer.

   You can create and activate notification templates for the *Recruiting Campaigns* notification type.

   You can insert the Recruiting Campaign data row on the template to enable recruiters to add up to 25 job posting links in a message.

   See Create and Activate Notification Templates.
6. (Optional) Create message templates for the *Recruiting Campaigns* notification type.

   See Steps: Set Up Message Templates.
7. (Optional) Maintain Recruiting Sources on page 272.

   Add a new recruiting source category and recruiting source and map it to the *Recruiting Campaigns* option. This enables you to view the campaign that is the source of the job application on a candidate's profile.
8. (Optional) Access the Edit Tenant Setup - Recruiting task.

   Select the Enable Automatic Candidate Merging check box. This supports candidate source tracking by merging candidates who submit applications with email recipients.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.
9. (Optional) Enable workers to mute internal recruiting campaigns.

   Set up the Notification Routing Rule for Recruiting Campaigns in the Edit Tenant Setup – Notifications task to include *Mute* as an Allowed Frequency.

   See Concept: Notifications.
10. Steps: Set Up Recruiting Campaign Email Analytics Discovery Board on page 395.
11. (Optional) Access the Candidate Engagement Hub.

    The hub displays published recruiting campaign and landing page analytics and provides links that enable you to drill down to further details and reports.

    Recruiters can add a link to the Candidate Engagement Hub in the Recruiting Hub under Shortcuts or add the Candidate Engagement worklet to their Workday homepage.

Result

Recruiters can manage campaigns and access analytics using the Maintain Recruiting Campaigns task.

Related Information

Tasks

Steps: Set Up Recruiting Hub on page 195

Reference

2022R2 What's New Post: Recruiting Campaigns

Manage Recruiting Campaigns

Prerequisites

- Create candidate pools that include external or internal candidates.
- For internal recruiting campaigns, configure the Apply to Job initiating action on the *Manage Internal Career Apply* business process security policy to include the *Employee as Self* security group to allow employees to apply to jobs from internal recruiting campaigns.
- Security: *Manage: Recruiting Campaigns* domain in the Candidate Engagement functional area.

Context

Workday enables you to create recruiting campaigns and schedule them to send to pools of prospects and candidates. You can configure a series of messages within a campaign and specify the conditions and timeframe in which Workday should send each message. Example: You can send a message to prospects who read your first email and another message to prospects who don't read your email after 5 days. You can also monitor campaign analytics using the Recruiting Campaign Analytics dashboard.

Steps

1. Access the Manage Recruiting Campaigns task.
2. Click Add New Campaign.

   As you complete the guided sections on the task, consider:

Option	Description
Campaign Name	Enter a unique name for the campaign.
Audience Type	Select *External* or *Internal* for your targeted audience type. Campaigns for external and internal candidates are mutually exclusive.
Select Recipients	Add recipients from existing candidate pools. Workday displays a count for recipients based on the audience type and exclusions. Workday doesn't send messages to these recruiting campaign recipients: • Purged candidates. • Recipients who unsubscribe from receiving campaign emails. External recruiting campaign exclusions: • Active workers in your tenant. • Confidential candidates and prospects. • Prospects who have declined consent for collecting their information Internal recruiting campaign exclusions: • External candidates or prospects. • Terminated workers. • Workers who have removed their primary work email address. • Workers who aren't internal candidates. • Workers that don't have a Workday account. You can't use private pools in recruiting campaigns. You also can't restrict or inactivate a pool used in a campaign until the campaign ends.
Set Up Messages	Set the campaign start and end dates, then configure emails and conditions. As you configure emails, you can select:

Option	Description
	• A notification template to specify the layout and design. • A message template to specify the text within the body and subject line. • How long you want to delay the message from sending. • Up to 25 job postings to link to if the notification template has the Campaign data row on it. The audience type selected restricts job postings listed. You can also draft messages by editing an existing template or by selecting a notification template and writing a custom message. However, if you modify a campaign message, Workday won't persist your edits in the message template. After configuring the initial email, you can configure subsequent emails and select conditions for sending them. The *Previous Email Is Clicked Into* condition checks if recipients click a link in the email. The *Previous Email Is Opened* condition checks if recipients read an email.
Review	If you don’t publish the campaign, Workday saves it as a draft.

3. Add or remove recipients individually from campaigns from the related actions menu on the Candidate profile.
    - Add recipients by selecting Candidate Actions > Add to Campaign.
    - Remove recipients by selecting Candidate Actions > Remove from Campaign.

Result

Workday begins processing campaign messages at 11:00 AM in the default time zone for your tenant. Campaign messages might take up to an hour to send to all recipients. Messages display on the timeline on the Recruiting History profile group of the Candidate profile.

If you've opted in to the Workday 32 - Time Zones feature, then Workday uses the user's local time zone.

Next Steps

- Click a campaign to view details or view the analytics dashboard to monitor campaign and recipient activities.
- Purge campaign records for job applications and candidates.

Related Information
Reference
What's New Post: Internal Recruiting Campaigns

Concept: Recruiting Campaign Analytics

Workday delivers email analytics so you can drill into email metrics and understand actions candidates take in response to campaigns. Examples:

- Number of emails delivered.
- Number of bounced, or undeliverable emails.
- Number of emails clicked and click-through rate.
- Number and rate of opened emails.
- Number and rate of unsubscribed emails.

Workday calculates open and click rates by dividing the number of opens or clicks for an email by the number of emails successfully delivered. When a recipient opens and clicks the same email more than once, Workday only counts 1 open and 1 click.

Purging and Merging Candidate Records

When you purge recruiting campaign communications for job applications, Workday no longer counts them in analytics. Purging campaigns for candidates has no impact on analytics.

You can use the Candidate Actions > Find Duplicates related action on the Candidate profile to merge candidate records. Workday automatically updates campaign data and analytics after a merge. Consider the impacts of these merge scenarios:

Scenario	Impact
You merge 2 prospects who each click the same email once.	Workday keeps the merge target in the campaign. Analytics show that 1 person clicked the email once.
You merge 2 prospects. One is in a campaign and the other isn't.	Workday keeps the merge target in the single campaign.
You merge 2 prospects who are each in different campaigns.	Workday keeps the merge target in both campaigns.
You want to unmerge a prospect who was previously 2 prospects in different campaigns. While merged, the prospect clicked an email in a campaign.	Workday separates the merge source from the merge target. Analytics show that only the merge target clicked the email.

Steps: Set Up Recruiting Campaign Email Analytics Discovery Board

Prerequisites

- Set up your tenant for Drive.
- Security: These domains in the System functional area:
    - *Discovery Boards: Administration*
    - *Discovery Boards: Create*
    - *Discovery Boards: Manage Delivered Discovery Boards*

Context

You can use the Recruiting Campaign Email Analytics discovery board to examine key performance indicators, including these tabs:

- Engagement: Provides information on recruiting campaigns and a breakdown of each campaign by open rate, click rate, and job application rate. You can determine which messages result in the most engagement and which recipients are most engaged. You can also see which campaigns have the highest unsubscribe, spam, and bounce rates.
- Job Applications: Displays data on job applications by campaign and details on which campaigns result in the most applications, interviews, offers, and hires.

The email analytics calculations include:

- Bounce Rate
- Click-Through Rate
- Job Application Conversion Rate
- Open Rate
- Spam Complaint Rate
- Total Clicked
- Total Opened
- Total Spam
- Total Unsubscribed
- Unsubscribe Rate

Steps

1. Access the Delivered Discovery Boards report.
2. Select Recruiting Campaign Email Analytics from the list of Workday-delivered discovery boards available in your tenant.
3. Select Make a Copy and save it in your Drive.
4. Configure your Recruiting Campaign Email Analytics discovery board and select controls as you see fit.

   Workday updates indexed data sources and fields every hour.
5. Configure which discovery board displays when you click the View Analytics button from a recruiting campaign.

   Access the Maintain Candidate Engagement task and select a discovery board from the Recruiting Campaigns prompt. When you click View Analytics from the Manage Recruiting Campaigns task, your selected discovery board displays.

Next Steps

You can customize the Recruiting Campaign Email Analytics discovery board by adding visualizations and sheets. Examples:

- Add indicators to your visualizations.
- Configure the Show Details functionality to enable users to drill down to prospect and job application records.

Related Information

Concepts

Concept: The Discovery Board Workflow

Concept: Discovery Board Workspace

Tasks

Copy Workday-Delivered Discovery Boards

Steps: Set Up Tenant for Discovery Boards

Steps: Set Up Recruiting Hub on page 195

FAQ: Recruiting Campaign Email Analytics

Why don't the job application counts on the Job Application tab match the Engagement tab on the delivered discovery board?	You can enable Automatic Candidate Merging in the Edit Tenant Setup - Recruiting task to merge the candidate records. See Concept: Automatic Candidate Merging on page 309. Example: Workday creates a candidate record for when a candidate receives a campaign message.

	When the same candidate applies to a job marketed through a recruiting campaign, Workday creates another candidate record. Enabling Automatic Candidate Merging allows Workday to count the job application for the campaign recipient.
Why is a campaign message in my spam folder not counted as Spam on the discovery board?	Candidate Engagement email analytics calculations for spam only capture messages marked as spam by the message recipient. Workday counts messages delivered to the spam folder as delivered emails.

Recruiting Landing Pages

Steps: Set Up Recruiting Landing Pages

Context

You can enable recruitment marketers to design and publish external web pages that market your organization to specific populations. A landing page can include prospect forms, job postings, photos, videos, and content relevant to the target population. You can also configure an analytics dashboard to view engagement metrics and conversion rates for prospect forms and job applications submitted by landing page visitors.

Steps

1. Enable the Candidate Engagement functional area.

   See Steps: Enable Functional Areas and Security Policies.
2. Edit Domain Security Policies.

   Grant access to these domains:

   - *Manage: Recruiting Landing Pages* to create landing pages.
   - *Drive* to upload video media files stored in Workday.
3. Create External Career Sites on page 379.

   Landing pages share the URL path, header, and footer of your career site. Workday doesn't support embed mode with landing pages.

   Enable Prospect Introduce Yourself on the external career site if you plan to use a Prospect Form on landing pages.
4. (Optional) Create candidate pools and candidate tags to apply to prospects who introduce themselves from landing pages.

   Use these tasks:

   - Maintain Candidate Tags (secured to the *Set Up: Recruiting* domain).
   - View All Candidate Pools (secured to the *Candidate Pool: View and Modify Pool* domain).

   You can only use static candidate pools for landing pages.
5. (Optional) Maintain Recruiting Sources on page 272.

   Add a new recruiting source category and recruiting source and map it to the *Recruiting Landing Pages* option. This step enables you to view the landing page that is the source of a prospect record on the prospect's profile.
6. Steps: Set Up Recruiting Landing Pages Analytics Discovery Board on page 400.

7. (Optional) Access the Candidate Engagement Hub.

   The hub displays high level metrics for campaigns and landing pages and provides a link to the analytics dashboard. Consider adding Candidate Engagement as a worklet on your Workday homepage or in your Recruiting Hub shortcuts.

Result

Recruitment marketers can create, publish, and analyze landing pages using the Manage Recruiting Landing Pages task.

Related Information

Reference

2022R2 What's New Post: Recruiting Landing Pages

Manage Recruiting Landing Pages

Prerequisites

- Set up landing pages and analytics.
- Create and publish an external career site with branding.
- Security: *Manage: Recruiting Landing Pages* domain in the Candidate Engagement functional area.

Context

You can create landing pages that are associated with an external career site. You can include these components on a landing page:

- Branded buttons.
- Images.
- Job postings.
- Prospect sign up forms.
- Text blocks.
- Videos

Steps

1. Access the Manage Recruiting Landing Pages or the Create Recruiting Landing Page tasks.

   Select an external career site to associate with the landing page.
2. Configure landing page contents.

   You can access these options by clicking Insert on the toolbar or by hovering over an existing content container. You can add new contents by clicking the + icon along the border of existing containers.

   Workday recommends that you click Save frequently on the header as you make changes.

Component	Settings
Image	Select an image that is less than 10MB. On the Image properties panel, you can: • Adjust positioning. • Expand the image to the full width of the page. • Resize images that aren't full-width. • Add descriptive text for screen reader users.

Component	Settings
	• Enter a link.
Text	Use options available on the toolbar to configure text formatting, such as styling, font size, adding links. On the Text properties panel, you can adjust positioning.
Buttons	Workday limits the shape and color of buttons to what's available on the associated career site. You must have access to the Edit Brand task to change button styling. On the Button properties panel, you can: • Adjust positioning. • Change a button to a primary or secondary brand style. • Enter button label text. • Enter a link.
Job Postings	You can add a subset of job postings from the associated career site. You can filter job postings to display only jobs relevant to the target audience. The filters that display depend on the configuration of the career site associated with the landing page. Up to 5 jobs display. Select the overflow button to display all the jobs that match page criteria. Workday automatically updates the list of jobs that display as you repost or unpost jobs. If you've mapped a recruiting source, Workday indicates the name of the landing page as the source after users submit the job application.
Prospect Form	You can add a link to the prospect form so interested users can create a prospect record. On the form properties panel, you can: • Adjust positioning. • Select a button style. • Enter button label text. • Specify candidate pools and candidate tags to associate with prospects who complete the form. If you've mapped a recruiting source, Workday indicates the name of the landing page as the source after users complete the form.
Video	You can upload a video from your device or select 1 available in Drive.

Component	Settings
All Components	From the properties panel on any component you can: • Adjust the padding, or amount of blank space around the component. • Select a background color. To change the background color for the entire landing page, select Settings > Background on the toolbar.

3. Translate page contents.

   To translate a landing page, select Language > Add Languages on the toolbar. You can only edit the layout of the landing page in the base language, English. Workday doesn't update content in other languages as you make changes to the base language. Consider adding languages after you finalize the base language content.

   Candidates who visit a published landing page can change the language on the web page header.
4. Publish the landing page or save it as a draft.

Result

When you publish a landing page, anyone who has the URL can view it.

Next Steps

Copy the published landing page URL and share it on your social media sites or in your recruiting campaigns. To make changes to a published landing page, edit and republish it. To archive a landing page permanently, unpublish it. You can reuse the contents of an archived landing page by copying it into a new page.

Click View Analytics on the Manage Recruiting Landing Pages task to access conversion rates and metrics.

Steps: Set Up Recruiting Landing Pages Analytics Discovery Board

Prerequisites

- Set up your tenant for Drive.
- Security: These domains in the System functional area:
  - *Discovery Boards: Administration*
  - *Discovery Boards: Create*
  - *Discovery Boards: Manage Delivered Discovery Boards*

Context

You can use the Recruiting Landing Pages Analytics discovery board to examine key performance indicators, including these tabs:

- Engagement: Provides information to help you determine which pages result in the most engagement for your audience, including page views, prospects, and job applications.
- Prospects and Job Applications: Provides data on prospects and job applications and details on which landing pages result in the most job applications that advance to interviews, offers, and hires.

Steps

1. Access the Delivered Discovery Boards report.

2. Select Recruiting Landing Pages Analytics from the list of discovery boards available in your tenant.
3. Select Make a Copy and save it in your Drive.
4. Share the copied discovery board with the security groups you want to view landing page analytics.
5. Configure which discovery board displays when you click the View Analytics button from a recruiting landing page.

   Access the Maintain Candidate Engagement task and select a discovery board from the Recruiting Landing Pages prompt. When you click View Analytics from the Manage Recruiting Landing Pages task, your selected discovery board displays.

Next Steps

You can customize the Recruiting Landing Pages Analytics discovery board by adding visualizations and sheets. Examples:

- Add indicators to your visualizations.
- Add Prospects and Job Applications to the Drill By Fields tab.
- Configure the Show Details functionality to enable users to drill down to prospect and job application records.

Related Information
Concepts
Concept: The Discovery Board Workflow
Concept: Discovery Board Workspace
Tasks
Copy Workday-Delivered Discovery Boards
Steps: Set Up Tenant for Discovery Boards

Recruiting Event Management

Steps: Set Up Recruiting Event Management

Context

Recruiting event organizers can create and manage virtual, in-person, and hybrid recruiting events to improve candidate engagement. You can set up event landing pages and registration forms for recruiting event management.

Steps

1. Enable the Candidate Engagement functional area.

   See Steps: Enable Functional Areas and Security Policies.
2. Edit Domain Security Policies.

   Grant access to these domains:

   - *Manage: Recruiting Events for Candidate Engagement* to create recruiting events.
   - *Set Up: Recruiting Events for Candidate Engagement* to enter recruiting event information.
3. Create External Career Sites.

   Event landing pages share the URL path, header, and footer of your career site.

4. (Optional) Create candidate pools and candidate tags to apply to event participants who register for events.

   When an event participant registers for an event, Workday creates a prospect record for the participant. Use these tasks:

   - Maintain Candidate Tags (secured to the *Set Up: Recruiting* domain).
   - View All Candidate Pools (secured to the *Candidate Pool: View and Modify Pool* domain). You can only use static candidate pools for event landing pages.
5. (Optional) Maintain Recruiting Sources.

   Add a new recruiting source category and recruiting source and map it to the *Recruiting Events* option. This step enables you to view which recruiting events are the source of a prospect record and job applications on a candidate's profile.
6. Create Recruiting Event Types.

   Create event types for recruiting events.
7. Create Recruiting Event Registration Templates.

   The template allows you to set up fields for recruiting event registration. You can require event participants to provide their email address, phone number, or resume during registration.
8. Review recruiting event communications.

   See Concept: Recruiting Event Management Messages.
9. Steps: Set Up Recruiting Event Analytics Discovery Board.
10. Access the Candidate Engagement Hub to access recruiting events.

Result

You can use the Manage Recruiting Events for Candidate Engagement report to access tasks to create and publish recruiting events and event landing pages.

Related Information

Tasks

Steps: Set Up Recruiting Landing Pages on page 397

Reference

2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 1

2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 2

2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 3

2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 4

Create Recruiting Event Types

Prerequisites

Security: *Set Up: Recruiting Events for Candidate Engagement* domain in the Candidate Engagement functional area.

Context

You can create and set up recruiting event types offered by recruiting event organizers.

Steps

1. Access the Maintain Recruiting Event Types for Candidate Engagement task.
2. Enter a name for the event type.

   You can use the same name for multiple event types. Create a name that is clear to all event administrators.
3. Set the order that you want the event types to display.

4. Confirm that the Inactive check box is clear.

Result

Recruiting event types display in the Create Recruiting Event for Candidate Engagement task. If 1 or more events use an event type, Workday selects the In Use check box.

Example

You can create an event type to use for all on-campus recruiting events.

Next Steps

You can use this same task to inactivate or edit event types. You can't delete an event type when 1 or more events use the type.

Related Information

Reference

2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 1

Create Recruiting Event Registration Templates

Prerequisites

- Set up recruiting events.
- Security: *Set Up: Recruiting Events for Candidate Engagement* domain in the Candidate Engagement functional area.

Context

You can create registration forms to be associated with recruiting events. Workday creates a prospect record for registered event participants.

Steps

1. Access the Create Recruiting Event Registration Template for Candidate Engagement task.
2. As you complete this registration form, consider:

Option	Description
Template Name	Name of the registration template.
Page Title	Workday recommends entering fewer than 25 characters.
Page Instruction Text	The instructions to provide during registration.
Require Email Address	Select if you want to require an email address for registration to use for event check-in.
Require Phone Number	Select if you want to require a phone number for registration.
Require Resume Attachment	Select if you want to require participants to attach a resume or CV.
Default Opt-in Terms and Conditions	Default terms and conditions are specific to the Registration Form page. Enter terms and conditions that display when you don't configure Opt-in Terms and Conditions by Country.

Option	Description
Opt-in Consent	Text that you enter in the Opt-in Consent field displays next to the consent check box.
Auto-Tag to Candidate Pool	Tag up to 50,000 prospects to candidate pools. When you reach the limit, Workday no longer adds prospects to the pool but continues to create a prospect record. The pools apply to all submissions for the site. If you anticipate over 50,000 submissions and don't have a process to move prospects from the selected pool into another, Workday recommends that you don't use this feature.
Auto-Tag with Candidate Tag	The tags apply to all submissions for the site.
Confirmation message for direct links	Enter a confirmation message that displays to the event participant once they register.

Next Steps

You can associate the registration template with an event. Use the Delete Recruiting Event Registration Template for Candidate Engagement task to delete registration templates that aren't in use.

Related Information
Reference
2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 1

Steps: Manage Recruiting Events for Candidate Engagement

Prerequisites

- Set up recruiting events types.
- Create and publish an external career site with branding.
- Create a registration template.
- Security: *Manage: Recruiting Events for Candidate Engagement* and *Manage: Recruiting Landing Pages* domains in the Candidate Engagement functional area.

Context

You can create recruiting events that are associated with an external career site and registration form. When you create an event, Workday also creates an event landing page. You can include these components only on event landing pages:

- Registration forms.
- Data field enabled text blocks.

Additional content types available for event landing pages:

- Branded buttons.
- Images
- Job Postings
- Videos

Steps

1. Access the Manage Recruiting Events for Candidate Engagement report or the Create Recruiting Event for Candidate Engagement task.

2. Enter event details. Select an external career site and registration form to associate with the event landing page.

   As you complete this task, consider:

   - Event Name
   - Description (Internal) for internal users to view.
   - Event Type
   - Start Date and Time
   - End Date and Time
   - Time Zone
   - Event Format: Virtual, In-person, or Hybrid.
   - Location for in-person events.
   - Conference Link for virtual and hybrid events.
   - Career Site for Event Page
   - Registration Template
   - Auto-Create Candidate Pool

     Security: *Candidate Pool: Create* domain in the Recruiting functional area.
3. Set up the event landing page contents.

   You can access these options by clicking Insert on the toolbar or by hovering over an existing content container. You can add new contents by clicking the + icon along the border of existing containers.

   Workday recommends that you click Save frequently on the header as you make changes.

Table 1: Event Landing Page Components

Component	Settings
Registration Form	You can add a button to the registration form so interested users can sign up to be an event participant. Workday creates a prospect record for all registered event participants. On the form properties panel, you can • Adjust positioning. • Select a button style. • Specify candidate pools and candidate tags to associate with prospects who complete the form. Note: If you selected the Auto-Create Candidate Pool check box, Workday defaults the automatically created candidate pool in the Auto-Tag to Candidate Pool prompt for the registration form.

Component	Settings
Data Enabled Text	You can add these data fields in text blocks for event landing pages. • Recruiting Event Conference Link • Recruiting Event Format • Recruiting Event Location • Recruiting Event Name • Recruiting Event Time Zone • Formatted Recruiting Event End Date • Formatted Recruiting Event End Time • Formatted Recruiting Event Start Date • Formatted Recruiting Event Start Time On the Text properties panel, you can adjust positioning.

Table 2: Landing Page Components

Components	Settings
Buttons	Workday limits the shape and color of buttons to what's available on the associated career site. You must have access to the Edit Brand task to change button styling. On the Button properties panel, you can: • Adjust positioning. • Change a button to a primary or secondary brand style. • Enter the button label text. • Enter a link.
Image	Select an image that is less than 10MB. On the Image properties panel, you can: • Adjust positioning. • Expand the image to the full width of the page. • Resize images that aren't full-width. • Add descriptive text for screen reader users. • Enter a link.
Job Postings	You can add a subset of job postings from the associated career site. You can filter job postings to display only jobs relevant to the target audience. The filters that display depend on the configuration of the career site associated with the landing page. Up to 5 jobs display. Select the overflow button to display all the jobs that match the page criteria. Workday automatically updates the list of jobs that display as you repost or unpost jobs.

Components	Settings
Text	Use options available on the toolbar to configure text formatting, such as styling, font size, adding links, and data fields.
Video	You can upload a video from your device or select 1 available in Drive.
All Components	From the properties panel on any component you can: • Adjust the padding, or amount of blank space around the component. • Select a background color. To change the background color for the entire landing page, select Settings > Background on the toolbar.

4. Publish the event landing page or save it as a draft.
5. Provide a link to the Check In page for Hybrid, In-Person, and Virtual events to enable registered participants to check in from a computer or mobile device.

   Set up a link to the Check In page on:

   - The event landing page.
   - An email or campaign communication.
   - Using event management QR codes.
   - Event participants must submit the email used during the registration process to check in.

Result

When you publish a page, anyone who has the URL can view it and use the registration button to access the registration form. To make changes to a published event landing page, edit and republish it. To archive an event landing page permanently, from the related actions menu select Recruiting Event for Candidate Engagement > Unpublish Event..

If you've opted in to the Workday 32 - Time Zones feature, then Workday uses the user's local time zone.

Next Steps

View and change recruiting event details on the Event Details tab of the View Recruiting Event for Candidate Engagement report. You can:

- View candidate pools and candidate tags that are associated with the event.
- Generate scannable QR codes for links to the event landing page, event registration, and event check-in page.
- Share these links for published events: event landing pages, event registration, event check-in.

Use the Event Roster tab on the View Recruiting Event for Candidate Engagement report to view:

- The contact information, registration status, and resumes for event participants.
- Use the Check In and Remove Check-In mass actions to manage event participant attendance.
- Use these mass actions on registered event participants: Add to Pool, Invite to Apply, Send Message, Share.

Use the Copy Recruiting Event for Candidate Engagement task to copy any recruiting event, including archived events.

- Access the task from the related actions menu on an event. Select Recruiting Event for Candidate Engagement > Copy Event.

- When you copy a recruiting event, Workday copies:
    - All event fields, except for the event name, start date and time, and end date and time. Workday will append copy to the name of the copied event.
    - All event landing page configurations, including candidate pool and candidate tag associations.
- Copying a recruiting event doesn't copy the event campaign and memberships.

Related Information

Tasks

Steps: Manage Candidate Pools on page 261

Reference

2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 1

2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 2

2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 4

Steps: Set Up Recruiting Event Analytics Discovery Board

Prerequisites

- Set up your tenant for Drive.
- Security: These domains in the System functional area:
    - *Discovery Boards: Administration*
    - *Discovery Boards: Create*
    - *Discovery Boards: Manage Delivered Discovery Boards*

Context

You can use the Recruiting Event Analytics discovery board to examine key performance indicators, including these tabs:

- Engagement: Provides information to help determine which recruiting events result in the most engagement for your audience, including page views, registrations, event attendance, and job applications.
- Prospects and Job Applications: Provides data on prospects and job applications and details on which recruiting events result in the most job applications that advance to interviews, offers, and hires.

Steps

1. Access the Delivered Discovery Boards report.
2. Select Recruiting Events Analytics from the list of discovery boards available in your tenant.
3. Select Make a Copy and save it in your Drive.
4. Share the copied discovery board with the security groups you want to view recruiting event analytics.
5. Configure which discovery board displays when you click the View Analytics button on the Manage Recruiting Events for Candidate Engagement report.

    Access the Maintain Candidate Engagement task and select a discovery board from the Recruiting Events prompt. When you click View Analytics from the Manage Recruiting Events for Candidate Engagement report, your selected discovery board displays.

Next Steps

Use the delivered controls to filter results by date or event status. You can customize the Recruiting Event Analytics discovery board by adding visualizations and sheets.

Related Information

Concepts

Concept: The Discovery Board Workflow

Concept: Discovery Board Workspace

Tasks

Copy Workday-Delivered Discovery Boards

Steps: Set Up Tenant for Discovery Boards

Reference

2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 3

Concept: Recruiting Event Management Messages

Recruiting event participants can receive registration confirmation and recruiting campaign messages. Workday sends confirmation messages to event participants who register with an email address. You can use recruiting campaigns to deliver messages for events.

Registration Confirmation

Workday automatically sends a registration confirmation message to all event participants who provide an email address. The confirmation message provides the event name, date, time, time zone, location, and the URL link (for hybrid and virtual events). See Create Recruiting Event Registration Templates.

If you've opted in to the Workday 32 - Time Zones feature, then Workday uses the user's local time zone.

We recommend creating a recruiting event email template using the Recruiting Event for Candidate Engagement Confirmation Email Template Behavior. See Create Email Templates.

Complete the task:

Option	Description
Static Content	• Add your company logo. • Add a registration confirmation message.
Dynamic Content	• For event details, select Recruiting Event Message . • Include the Conference Link URL for virtual or hybrid events.

The registration confirmation message triggers the Confirmed Opt-In (COI) request. We deliver the Event Management registration confirmation message regardless of the COI status of the recipient. We recommend updating the COI standard email notification template to inform COI recipients that Candidate Engagement messages are exempt from COI. See Concept: Confirmed Opt-In for Email Communications.

Note: At this time, only Job Alerts, Invite to Apply, and Send Message (without the context of a job application) emails require COI.

Recruiting Campaigns

You can optionally associate a recruiting event with 1 or more recruiting campaigns in a draft or published status to send branded email communications to event participants. See Steps: Set Up Recruiting Campaigns.

You can't remove campaigns from events once they've started, and once you associate a campaign with a recruiting event it's unavailable for other events.

You can access the Manage Event Campaigns for Candidate Engagement task using the Manage Event Campaigns option from related actions on an event.

The View Recruiting Event for Candidate Engagement report includes a Manage Event Campaigns button for the Manage Event Campaigns for Candidate Engagement task.

You can use recruiting event data fields in text blocks for recruiting campaign messages. Only published recruiting events return a value for fields in messages for the associated campaign.

Example: Include Recruiting Event Name and Recruiting Event Landing Page URL data fields in the campaign message to display the event name and URL in the body of the message.
Related Information
Reference
2024R1 What's New Post: Recruiting Event Management for Candidate Engagement - Part 3

Job Postings

Setup Considerations: Job Postings

You can use this topic to help make decisions when planning your configuration and use of Job Postings 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

Job Postings functionality enables you to advertise open job requisitions on internal and external career sites.

Business Benefits

Workday Job Postings improve hiring efficiency by enabling you to:

- Broaden candidate reach by posting job openings to internal, external, or agency sites.
- Protect confidential job requisitions by restricting access to sensitive postings.
- Attract top talent by allowing you to embed promotional videos about your organization into configurable job posting templates.
- Save time and reduce manual effort by automatically unposting of filled positions.
- Increase job visibility and reach by sharing job postings on social media.

Use Cases

- Post confidential job postings. Example: Share confidential requisitions with select agencies so they can source candidates for sensitive roles without public disclosure.
- Automatically unpost jobs when you've filled all positions on a job requisition. Example: If a requisition has 3 openings and all are filled, Workday unposts the job from all career sites.
- Post jobs to agency career sites. Example: Partner with agencies so their users can submit candidates directly.
- Add a video to promote your organization. Example: Add videos to job posting templates to showcase your culture and attract candidates.
- Sharing Job Postings on Social Media. Example: Post openings on LinkedIn or Facebook to reach a wider audience.

Questions to Consider

Question	Consideration
How do you want to send job posting details to third-party sites?	You can use integrations with external job board services to send job postings to third-party career sites. Example: Use eQuest to send job postings to a job board.
Where do you want to post your available jobs?	You can post your jobs to internal, external, and agency career sites.
Do you want candidates to find translated job postings?	Workday supports multi-language search for translated job postings including the Job Description and the Job Posting Title on the external career site.
How do you want to share confidential job openings?	Workday doesn't display confidential job openings in the search results on external career sites. You can share the link to a confidential job posting directly with candidates. Example: A job posting for a prospective top executive.
What media do you want to add to your job postings?	You can configure your job posting templates to include videos.
What social media websites do you want to enable internal users share your job postings on?	You can configure social media platforms for users to share jobs from a job posting page. To support social media sharing from internal career sites, post a job requisition both externally and internally.

Recommendations

To increase efficiency, Workday recommends that you configure business process steps to:

- Post or unpost jobs when you create, edit, or freeze job requisitions.
- Automatically unpost jobs when you close or fill a job requisition.

When you use the Find Jobs Template for External Career Sites report, we recommend that you ensure the report displays correctly on external career sites by:

- Creating a custom report.
- Modifying only the search facets associated with the report.

Requirements

Before configuring job postings:

- Set up job requisitions for Recruiting.
- Configure the *Update Job Posting* business process to manage your job postings.

Limitations

To update a job posting, you must unpost it, and repost the updated job posting.

Tenant Setup

No impact.

Security

Domain	Description
Internal Careers	Users can access tasks and reports associated with internal careers. Example: Using the Browse Jobs report to view current openings.
Job Postings *Job Postings: External* *Job Postings: Internal*	Users can view job postings posted to internal and external career sites.
Set Up: Job Postings	Users can create and edit job posting templates.
Set Up: Social Sharing	Users can configure social sharing tasks and reports.

Business Processes

Business Process	Consideration
Post Job	You can use the *Post Job* business process to post jobs. Add *Post Jobs* as a subprocess of these business processes: • *Evergreen Requisition* • *Job Requisition*
Update Job Posting	You can use the *Update Job Posting* business process to manage existing job postings. You can add *Update Job Posting* as a subprocess of these business processes: • *Evergreen Requisition Change* • *Close Evergreen Requisition* • *Close Job Requisition* • *Freeze Job Requisition* • *Job Requisition Change*
Close Job Requisition	You can also use the *Automatically Unpost Jobs* step in the *Close Job Requisition* business process, and on subprocesses of the *Job Application* business process. Example: You can configure the business process to unpost a job automatically once you send an offer to a candidate.

Reporting

Report	Description
Browse Jobs	Enables workers to view approved internal job postings on the Workday browser application.
Find Jobs	Enables workers to view approved internal job postings with Workday on: • Android • iPad

Report	Description
	• iPhone You can copy this report to create custom Find Jobs reports for your employees and contingent workers.
Find Jobs for External Career Sites	Enables external candidates to view with a list of published job postings.
Find Jobs Template for External Career Sites	Enables users to create a custom Find Jobs report for an external career site. Workday recommends that you only modify the search facets associated with the report.
Job Requisition Audit	Enables users to view any closed, frozen, or filled job requisitions that have active postings. You can also unpost job postings from this report.

Integrations

You can use integrations to post jobs to third-party sites using:

- Core Connector.
- The *Post Job* web service.
- Report-as-a-Service (RaaS).

You can also use the *Get Job Posting* web service to retrieve active posted jobs, jobs from a specific date range, or from a specific job requisition.

Connections and Touchpoints

Touchpoint	Description
Career Sites	You can post your job postings to external, internal, and agency career sites.
Job Applications	Candidates can apply to jobs from external and internal career sites. Agency users can also submit applications on behalf of a candidate.
Evergreen Requisitions Job Requisitions	You can post jobs for open evergreen or job requisitions.

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 Job Postings

Prerequisites

Security: These domains in the Recruiting functional area:

- *Internal Careers*
- *Set Up: Job Postings*

Context

Configure Workday so you can post your job openings to external and internal career sites and source candidates.

Steps

1. Configure the *Post Job* and *Update Job Posting* business processes and security policies.

   Note: To unpost jobs from the Job Postings tab of the job requisition profile, users need access to the *Unpost Jobs* initiating action on the *Update Job Posting* business process security policy.

   See:

   - Edit Business Processes.
   - Edit Business Process Security Policies.
2. (Optional) Send a task to My Tasks to post a job when you create, edit, or unfreeze a job requisition.

   Add *Post Job* as a step on these business processes:

   - *Close Evergreen Requisition*
   - *Create Job Requisition*
   - *Evergreen Requisition*
   - *Evergreen Requisition Change*
   - *Job Requisition Change*
   - *Unfreeze Job Requisitions*
3. (Optional) Send a task to My Tasks as a reminder to remove a job posting when you edit, close, or freeze a job requisition.

   Add *Unpost Job* as a step on these business processes:

   - *Close Evergreen Requisition*
   - *Close Job Requisition*
   - *Evergreen Requisition*
   - *Evergreen Requisition Change*
   - *Freeze Job Requisitions*
   - *Job Requisition Change*
4. (Optional) Configure Workday to remove jobs from career sites automatically.

   Add *Automatically Unpost Jobs* as an *Action* step on 1 of these business processes:

   - *Assess Candidate*
   - *Background Check*
   - *Interview*
   - *Offer*
   - *Reference Check*
   - *Screen*

   Workday recommends that you add this step after the *Make Decision* step. When the step is added, a condition rule; *Event is valid for auto unposting?*, also displays.

   You only need to edit the business processes you would hire a candidate from. If you never move a candidate from the *Assessment* stage to the *Ready for Hire* stage, there's no need to edit the *Assess Candidate* business process.

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
5. Create Job Posting Templates on page 416.
6. Create External Career Sites on page 379.

7. Set up an internal career site.

   See Steps: Set Up Internal Recruiting on page 371.
8. Steps: Set Up Profiles and Profile Groups.

   Configure the Job Postings for Job Requisition Composite View profile group. You can add these reports:

   - Current
   - Future
   - Historical
9. Access the Configure Social Sharing Targets task to enable workers to post job links on their social media accounts.

   Enable the applicable country for a specific social media site.

   Security: *Set Up: Social Sharing* domain in the Recruiting functional area.

Related Information

Tasks

Steps: Set Up Recruiting on page 191

Post Jobs on page 418

Reference

Release Center: Job Posting End Date and Time Left to Apply on Job Postings

The Next Level: Capitalizing on Your Career Site

Steps: Set Up Remote Jobs

Prerequisites

Security: *Set Up: Recruiting* in the Recruiting functional area to provide access to these tasks:

- Maintain Job Requisition Remote Types
- View Job Requisition Remote Types

Context

Create custom values that you can use when creating remote job requisitions. You can post these remote jobs to your career sites making it easier for prospects to search, find, and apply to remote opportunities in your organization.

This feature is hidden by default. Use the Configure Optional Fields task to display the Remote Type field.

Steps

1. Access the Maintain Job Requisition Remote Types task and configure Remote Types to display on Job Requisitions and Evergreen Requisitions.

2. Access the Configure Optional Fields task.

   From the By Functional Area prompt add the Remote Type field to these areas appropriate for your use cases:

   - Job Requisition
   - Job Requisition Change
   - Job Requisition Details for Composite View
   - Close Job Requisition
   - Freeze Job Requisition
   - View Job Requisition Detail
   - Evergreen Requisition
   - Evergreen Requisition Change
   - Close Evergreen Requisition
3. (Optional) Add the Remote Type filters to your External Career Site, enabling prospects to filter jobs on your career site.

   Edit the Find Jobs custom report:

   - Under the Advanced tab:
     - Add the Is Remote field to enable it to display as a boolean filter under the Location/ Distance facet on the career site.
     - Add the Remote Type report field under the Advanced tab to display the specific remote type as an additional filter.
   - Under the Search Results tab:
     - Add the Remote Type field to display the specific remote value for each individual job posting preview card and job posting.

Example

Use the Maintain Job Requisition Remote Types task to assign your remote type an internal facing name. You can also assign the same remote type an external facing name, which displays on the career site of your organization.

Next Steps

Use the View Job Requisition Remote Types report to view:

- The Name of the Remote Type.
- If Primary Job Posting Location is required.
- If the Remote Type is Inactive or In Use.

Related Information

Tasks

Post Jobs on page 418

Reference

2022R2 What's New Post: Support for Remote Jobs

Create Job Posting Templates

Prerequisites

Security: *Set Up: Job Postings* domain in the Recruiting functional area.

Context

Templates define the look and content of a job posting. Once you create a template, you can assign it to an external or internal career site. Workday enables you to create as many templates as you need, but you can only assign 1 template to a career site.

Steps

1. Access the Create Job Posting Template Content task.
2. Select a sidebar configuration to display next to job details on external career sites.
3. Add rows for template content using the Section Content grid.

   If your job posting requires compensation information, consider adding these report fields:

Report Field	Description
• *Job Profile Compensation Grades* • *Job Profile Minimum - Maximum Compensation Pay Range*	These fields pull compensation data from the primary job profile and any additional job profiles. If you use these fields, ensure the compensation grade and applicable compensation grade profiles are added to a job requisition's primary and additional job profiles.
Minimum - Maximum Requisition Compensation Pay Range	This field displays the pay range of job requisitions using requisition compensation. If you use this field, you must have the Request Requisition Compensation step in your Job Requisition business process.

4. (Optional) Upload a logo to display next to the job title on the posting. This logo can be different than your external career site logo.
5. (Optional) Upload a video or select a video from Drive.

   Note: You must have a valid Workday Media Cloud contract before you can upload videos. See: Workday Community: Media Cloud.
6. Access the Create Job Posting Template task.

   Use condition rules to associate content with job posting templates.

   If no rules evaluate as true, the job posting will use the default template content.

Next Steps

To assign the job posting template to your:

- External career site, access the Edit External Career Site task and select the Job Posting Template prompt under Job Details.
- Internal career site, access the Edit Internal Career Site task and select the Job Posting Template prompt.
- Internal career site for nonworkers, access the Edit Internal Career Site for Non-Workers task and select the Job Posting Template prompt.

Related Information

Tasks

Steps: Configure External Career Site Sidebars on page 368

Reference

2021R2 What's New Post: External Career Site Search Experience and Job Details

2023R1 What's New Post: Salary and Compensation Grade Ranges for Job Postings

Post Jobs

Prerequisites

- Set up job requisitions for Recruiting. See Steps: Set Up Job Requisitions for Recruiting.
- Set up job postings. See Steps: Set Up Job Postings.
- Configure these security domains in the Recruiting functional area:
  - *Job Postings: External*
  - *Job Postings: Internal*
  - *Set Up: Social Sharing*

Context

Post jobs to career sites to source candidates for your job openings. Candidates can apply to job postings directly. Recruiters can also create job applications on behalf of candidates.

You can post jobs to:

- External career sites.
- Recruiting agencies.
- Your internal career site.

You can only post jobs for open requisitions. You can't post a job when the requisition is assigned to someone and has a pending My Tasks item. If you schedule a job posting, Workday uses the time zone of the primary location defined on the job requisition.

Steps

1. Access the Post Job task or click Post Job on the Job Posting profile group of the job requisition profile.
2. As you complete the task, consider:

Option	Description
Job Posting Site	Select 1 or more job posting sites.
Preview Job Posting	Workday displays a preview of the job posting based on the job posting template.
Primary Posting	Workday uses the Primary Posting check box to determine the site to use as the link to the job posting for: • Notifications sent by the Refer a Candidate task. • Social share links on the internal career site job posting. You can only select 1 primary posting site for a job requisition.
Forecasted Agency Payout	When you post a job to an agency, this field populates with the percentage or value set in the Payout Terms section on the Create or Edit Recruiting Agency tasks.

Result

The Job Postings grid on the job requisition profile displays all internal, external, and agency postings for the job requisition.

Next Steps

You can also post jobs to third party websites using:

- The Core Connector: Job Postings integration.
- The *Post Job* web service.
- A Report-as-a-Service (RaaS) integration.

To manage job postings, use these tasks:

- Update Job Posting.
- Unpost Job. You can also unpost multiple job postings at once from the Job Postings profile group on the job requisition. You can't remove job postings assigned to a user who has a pending My Tasks item.

You can use the *Get Job Posting* web service to retrieve all active posted jobs, jobs posted within a specific date range, or a specific job requisition.

To change recruiting agency payout information, edit a job application and update the Recruiting Agency Payout.

Related Information
Tasks

Steps: Set Up Job Requisitions for Recruiting on page 220

Steps: Set Up Job Postings on page 413

Steps: Set Up Job Applications on page 445

Concept: Automatically Unpost Jobs

When you move a candidate from one of the stages where you added *Automatically Unpost Jobs* as a step, Workday uses the *Event is valid for auto unposting?* condition rule to determine whether to perform the step based on the outcome of the decision step.

If you decline the candidate at the decision step, Workday skips the *Automatically Unpost Jobs* step and marks it as *Not Required* in the business process history. Otherwise, Workday completes the step and moves to the next step of the *Job Application* business process.

The *Automatically Unpost Jobs* step evaluates the positions left on the job requisition.

- If no positions remain, Workday removes all related job postings on all career sites, including current and future dated listings.
- If 1 or more positions remain, the job postings stay posted.

You can manually unpost jobs when you've configured the *Automatically Unpost Jobs*. Workday skips the step if an *Update Job Posting* business process is already in progress.

If you rescind the *Job Application* business process, Workday rescinds the *Automatically Unpost Jobs* step and reposts all unposted jobs.

Related Information
Tasks

Steps: Set Up Job Postings on page 413

Reference

The Next Level: Automatic Decline and Unposting Actions

Concept: Job Posting End Date and Time Left to Apply

Workday displays the Job Posting End Date and the Time Left to Apply on all internal, external, and agency sites job postings.

Displaying the Job Posting End Date and Time Left to Apply fields enables potential candidates to track application deadlines, ensuring they don't miss job opportunities. This also ensures regulatory compliancy in jurisdictions where job posting transparency is a legal requirement.

Note: If you've opted in to the Workday 32 - Time Zones feature, then Workday uses the user's local time zone.

Job Posting End Date

The value of the Job Posting End Date field will display on all internal, external, and agency site job postings. The job posting will end and Workday will unpost the job after 23:59 on the previous day.

Workday follows this time zone logic for the Job Posting Start Date and Job Posting End Date:

- If the job requisition has a Primary Location, it uses the time zone of the Primary Location.
- If the job requisition has no Primary Location, it uses the default time zone on your tenant.
- If the job requisition has no Primary Location, and there's no default time zone on your tenant, it uses Pacific Standard Time (PST).

Time Left to Apply

The Time Left to Apply is the time difference between the Job Posting End Date and the current time in the job requisition location.

Example: If a job posting has the Job Posting End Date as November 2, 2024 and the current datetime is November 1, 2024 at 23:00, the Time Left to Apply field will display as 1 Hour Left to Apply. Workday will remove the job posting on September 2, 2023, at 00:00.

Job Cards in Search for Jobs

To display the Job Posting End Date and Time Left To Apply on Job Cards in Search for Jobs on the external career site, you can edit the Find Jobs Report and add 1 or both of these report fields to the search results:

- Job Posting End Date as Text
- Time Left to Apply

Job Posting End Date and Time Left to Apply Opt-Out

You can opt out of displaying the Job Posting End Date and Time Left to Apply on your Job Postings.

Access the Edit Tenant Setup - Recruiting task and select the Hide End Date and Time Left to Apply on Job Postings checkbox.

Related Information
Tasks
Post Jobs on page 418

Concept: Google Jobs

Workday enables you to draw external candidates to your job postings by ensuring that your job postings are compliant with Google for Jobs search.

When you post a job, the data structure for the posting includes:

- Date Posted: The start date on the job posting.
- Employment Type: The time type on the position or hiring restrictions. If time type is *Full time* or *Part time*, then Workday uses those values. If time type is anything else, Workday uses *Other* as the value.
- Hiring Organization: The company on the evergreen or job requisition.
- Identifier: The requisition Id.

- Job Description: The job description associated with the job posting.
- Job Location: The city and country from the primary location on the evergreen or job requisition. Exception is when evergreen requisition doesn't have a location.
- Job Title: The job title from the evergreen or job requisition.

Recruiting Agencies

Setup Considerations: Recruiting Agencies

You can use this topic to help make decisions when planning your configuration and use of recruiting agencies, 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

Recruiting agency management enables you to work with recruiting agencies who source and submit candidates for your open job requisitions.

Business Benefits

- Create agencies and establish hierarchies between them.
- Share job postings with specific agencies, including confidential postings.
- Create Workday accounts for agency users and enable them to submit candidates to job postings.
- Send questionnaires to agency users.
- Track agency payouts for successful candidates.

Use Cases

- Manage multiple recruiting agencies that each specialize in 1 type of vacancy by creating different agency types.
- Manage multiple types of vacancies that each have different payouts.
- Use Candidate Home accounts to collect further candidate information from agency candidates.

Questions to Consider

Question	Considerations
How do you want to track recruiting agency candidates?	You can create any number of custom recruiting sources on the Maintain Recruiting Sources task. Decide whether you want to create: • Individual sources for each recruiting agency, which enables more granular reporting for agency candidates, but requires additional configuration and maintenance. • A single source for all recruiting agencies.

Question	Considerations
Do you want to organize agencies by their type?	You can create recruiting agency types on the Maintain Recruiting Agency Types task.
Do you want to restrict agency job postings to specific locations?	When you create and edit recruiting agencies, you can limit job postings on the agency career site to specific locations.
Do you want recruiters to review agency candidates before they enter the recruiting workflow?	Add a *Review* step on the *Submit Agency Candidate* business process.
Do you use recruiting agencies to fill sensitive positions?	You can post confidential job requisitions to recruiting agencies so they can source confidential candidates.

Recommendations

Workday recommends that you configure external label overrides for the *Job Application* business process type on the Configure Dynamic Action Labels task. These labels replace the internal names of job application stages on the:

- Agency Job Applications report for recruiting agency users.
- Candidate Home for external candidates.

To ask agency candidates to create a Candidate Home account, configure a custom notification on one of the subprocesses of the *Job Application* business process.

Workday also recommends that you configure regions when setting up recruiting agencies. Configuring regions improve search results for jobs posted on the career site.

Requirements

To create Workday accounts for agency users, they must have a valid Primary Work email address.

Limitations

Workday doesn't create invoices or process automatic payments to recruiting agencies for successful agency candidates. The agency fees that you specify are for informational purposes only.

Workday doesn't enable you to:

- Send ad hoc messages to agency users. You can configure business process notifications to notify agency users of important events, such as newly posted jobs.
- Mass distribute tasks and documents to agency users within Workday. However, you can store document attachments, such as terms and conditions, on the agency profile.

Tenant Setup

When creating Workday accounts for agency users you can select tenant-wide configurations on the Edit Tenant Setup - Security task to determine whether to:

- Enable agency users to receive Workday generated emails, such as password reset confirmation. For security reasons, select the Send to work email only option.
- Email a temporary password to agency users when a Workday account is created.
- Enable agency users to reset their password at the Workday sign in page.

Note: These settings aren't limited to agency users. They impact all users with Workday accounts.

Security

Domain	Considerations
Set Up: Recruiting Agency in these functional areas: • Recruiting • Talent Pipeline	Users with Modify permission on this domain can create and edit: • Recruiting agencies. • Agency users. They can also view agency performance statistics.
Manage: Recruiting Agency in the Recruiting functional area	Users secured to this domain can: • View recruiting agencies. • View, create, and edit agency users.
Recruiting Agency Careers in the Recruiting functional area	Agency users secured to this domain can: • Access the agency career site (Find Agency Jobs report). • View their own candidates. We recommend adding the All Recruiting Agency Users security group to this domain policy.
Recruiting Agency Careers Self-Service in the Recruiting functional area	Users secured to this domain can: • View agency candidates and their job applications on the Find Agency Jobs report. • View job posting details. • Set personal candidate reminders. We recommend adding the Recruiting Agency User as Self group to this security policy.
Self-Service: Recruiting Agency User in the Recruiting functional area	This domain provides recruiting agency users with access to their own information.
Worklet: Recruiting in the Recruiting functional area	We recommend adding the Recruiting Agency User as Self group to this security policy if you want to use the Recruiting worklet for agency users.
Confidential Job Requisitions in the Recruiting functional area	Agency users secured to this domain can: • View confidential jobs posted to their agency career site. • Submit confidential candidates to these job postings.

Business Processes

Business Process	Considerations
Create Workday Account business process in the System functional area	Users with access to this business process security policy can create new Workday accounts. Add a role that can create Workday accounts for new agency users.
Submit Recruiting Agency Candidate business process in the Recruiting functional area	Add the Recruiting Agency User as Self security group to the *Submit Candidate* initiating action.

Business Process	Considerations
	Consider adding a *Review Recruiting Agency Candidate Duplicates* step on this business process. This step notifies the assigned security group when: • The candidate is a potential duplicate of another candidate. • More than 1 agency potentially owns this candidate.

Reporting

Reports	Considerations
Agency Job Applications report	Agency users can access this report to view a list of approved candidates submitted by their agency.
Agency Performance Summary report	Recruiting administrators can access this report to view and compare agency performance metrics.
Find Agency Jobs report	Agency users can access this report to view a list of approved agency job postings and submit candidates.
Recruiting Agency Payouts report	Recruiting administrators can access this report to view and compare agency fees, forecasted payouts, and actual payouts for hired agency candidates.
Source Effectiveness report	Recruiters can access this report to view and compare recruiting source effectiveness, including agency sources.
Recruiting worklet	You can add these tasks and reports to the Recruiting worklet and enable them for agency users: • Find Agency Jobs task. • View Recruiting Agency report. • View Recruiting Agency User report.

Integrations

You can perform bulk data operations using these Workday-delivered web services:

Web Services	Considerations
• *Put Recruiting Agency* • *Put Recruiting Agency Additional Data* • *Put Recruiting Agency User*	Enables you to mass upload recruiting agency and agency user information.
• *Get Recruiting Agencies* • *Get Recruiting Agency Additional Data* • *Get Recruiting Agency Users*	Enables you to mass retrieve recruiting agency and agency user information.

Connections and Touchpoints

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.

Related Information

Concepts

Concept: Segmented Security for Recruiting Questionnaires on page 459

Tasks

Steps: Enable Self-Management for Recruiting Agencies on page 427

Steps: Set Up Notifications for Candidate Home Tasks on page 376

Reference

Reference: Edit Tenant Setup - Security

Workday Community: Workday Recruiter Experience for End Users

Steps: Set Up Recruiting Agencies and Agency Users

Prerequisites

Review setup considerations for recruiting agencies.

Context

You can configure Workday to:

- Manage your relationship with third-party recruiting agencies.
- Enable recruiting agency users to submit candidates to job postings.
- Enable recruiting agencies to support confidential job postings and enable agency users to submit candidates to these job postings.

Use these Workday-delivered security groups to configure access for recruiting agency users:

- All Recruiting Agency Users
- Recruiting Agency User as Self

The *Set Up: Recruiting Agency* domain enables users with Modify permission to create recruiting agencies. You can also create or configure a Recruiting Agency Administrator role who can create and manage agency users.

Steps

1. Edit Domain Security Policies.

   Configure security for these domains:

   - *Confidential Job Requisitions*
   - *Manage: Recruiting Agency*
   - *Recruiting Agency Careers*
   - *Recruiting Agency Careers Self-Service*
   - *Self-Service: Recruiting Agency User*
   - *Set Up: Recruiting Agency*
   - *Worklet: Recruiting*

2. Edit Business Processes.

   Configure the *Submit Recruiting Agency Candidate* business process. Consider these steps:

   - *Complete Questionnaire*: The candidates' answers display on their profiles. To send the notification to the recruiting agent who referred a candidate, use the *Initiator* security group.
   - *Review Recruiting Agency Candidate Duplicates*: Workday sends the assigned security group a task in My Tasks when:
     - The candidate is a potential duplicate of another candidate submitted by the recruiting agency.
     - There's a potential ownership conflict for this candidate.
   - *Candidate Review of Agency Submission*: Sends the submission to the candidate so they can review and edit information that an agency has submitted on their behalf. Workday recommends you add this step after any internal review steps you've configured.
3. Edit Business Process Security Policies.

   Configure security for the *Submit Recruiting Agency Candidate* business process.
4. Create Segment-Based Security Groups.

   Configure the segment-based security groups that have access to the *Candidate Data: Recruiting Agency Questionnaires* security segment.
5. (Optional) Create Custom Notifications.

   You can create custom notifications on the:

   - *Post Job* business process to notify recruiting agency users when you post a job to their agency career site.
   - *Submit Recruiting Agency Candidate* business process to notify candidates that they have a submission to review. You can configure separate notifications for candidates with existing home accounts, and candidates with no home account.
6. Maintain Recruiting Sources on page 272.
7. Create Job Posting Templates on page 416.
8. Create Recruiting Agencies and Agency Users on page 427.
9. Create Workday accounts for recruiting agency users.

   From an agency user's related actions menu, select Security Profile > Create Workday Account.

   Security: Configure the *Create Workday Account* business process security policy in the System functional area.
10. (Optional) Set Up Recruiting Agencies for Confidential Job Postings and Candidates on page 428.
11. Set Up Worklets.

    Add these reports to the Recruiting worklet:

    - Find Agency Jobs
    - View Recruiting Agency
    - View Recruiting Agency User
12. Identify Duplicate Recruiting Agency Candidates on page 429.

    Prevent recruiting agencies from submitting duplicate candidates.

Next Steps

- Create recruiting agency types on the Maintain Recruiting Agency Types task.
- Post jobs to the recruiting agency career site.

Related Information

Concepts

Concept: Recruiting Agency Management on page 429

Tasks

Steps: Set Up Recruiting on page 191
Edit Domain Security Policies
Set Up Recruiting Agencies for Confidential Job Postings and Candidates on page 428

Steps: Enable Self-Management for Recruiting Agencies

Context

You can enable the Recruiting Agency Administrator to create recruiting agency users and manage their information.

Steps

1. Set Up Assignable Roles.

   Create a Recruiting Agency Administrator role and enable it for recruiting agencies on the Enabled for prompt.
2. Create Role-Based Security Groups

   Create the Recruiting Agency Administrator role-based security group and associate it with the Recruiting Agency Administrator role on the Assignable Role prompt.
3. Maintain Security Group Permissions.

   Enable View and Modify permission on the *Manage: Recruiting Agency* domain for the *Recruiting Agency Administrator* security group.
4. Activate Pending Security Policy Changes.
5. Assign the Recruiting Agency Administrator role to an active recruiting agency user.

   See Concept: Assign Roles.

Result

The Recruiting Agency Administrator role now has access to the:

- Create Recruiting Agency User task.
- Edit Recruiting Agency User task.
- View Recruiting Agency report.
- View Recruiting Agency User report.

Create Recruiting Agencies and Agency Users

Prerequisites

- Create recruiting sources for agency-submitted candidates.
- Security: Configure these domains in the Recruiting functional area:
  - *Set Up: Recruiting Agency*
  - *Manage: Recruiting Agency*

Context

You can create recruiting agencies, establish hierarchies between them, and create recruiting agency users. You can assign a user to more than 1 agency.

Each agency has its own internal career site where agency users can submit candidates for job postings.

Steps

1. Access the Create Recruiting Agency task.

2. On the Career Site Configuration tab, consider:

Option	Description
Ownership Period (Months)	The ownership period begins once the candidate is in the Review stage of the *Job Application* business process. More than 1 recruiting agency can own a candidate.
Linked External Career Site	Enables Workday to route agency candidates to the external career site, where they can review and complete their application.
Allow Confidential Job Postings	Enables you to post confidential job requisitions to this recruiting agency.
Restrict to Locations	Limit job postings only to job requisitions with this location as the primary location.
Terms and Conditions	This text displays before a recruiting agency user submits a candidate.
Require e-signature	Require agency users to acknowledge they read the terms and conditions before they submit a candidate.

3. On the Payout Terms tab, select a Fee Type.

   Workday calculates percentage fees based on the candidate's total compensation. The payment options you select are for informational purposes only. Workday doesn't generate invoices or make automatic payments to recruiting agencies based on these settings.
4. On the Agency Users tab of the confirmation page that displays once you finish creating the agency, click Create Agency User.

   If you want to create a Workday account for an agency user, they must have a Primary Work email address.

Next Steps

Workday provides a number of standard reports to help you track and manage recruiting agencies. For a complete list with report descriptions, access Workday Standard Reports and select the *Recruiting* category.

Set Up Recruiting Agencies for Confidential Job Postings and Candidates

Prerequisites

- Set up agencies and agency users.
- Security: These domains in the Recruiting functional area:
  - *Confidential Job Requisitions*
  - *Set Up: Recruiting Agency*
- Security: *Set Up: Assignable Roles* in the Organizations and Roles functional area.

Context

You can configure recruiting agencies to support confidential job postings and enable agency users to submit candidates to these job postings.

Steps

1. Access the Edit Recruiting Agency task.

2. On the Career Site Configuration tab, select the Allow Confidential Job Postings check box.
3. Create an assignable role for recruiting agencies on the Maintain Assignable Roles task. See Set Up Assignable Roles.
4. Add agency users to the *Confidential Job Requisitions* domain.

Result

You can now post confidential job requisitions to agency career sites and agency users can submit candidates to these job postings.

Next Steps

Update the agency job posting template to include job postings from confidential requisitions.

Identify Duplicate Recruiting Agency Candidates

Prerequisites

- Configure the *Submit Recruiting Agency Candidate* business process and security policy in the Recruiting functional area.
- Security: *Candidate Merge* domain in the Recruiting functional area.

Context

You can configure the *Submit Recruiting Agency Candidate* business process to prevent recruiting agencies from submitting duplicate candidates. Workday flags candidates with matching first and last names as a duplicate if at least one of these fields is also an exact match:

- Any social network username or profile.
- Email.
- Phone.

Steps

1. Access the *Submit Recruiting Agency Candidate* business process definition.
2. Add a new condition rule on the initiation step.

   As you complete the task, consider:

Option	Description
Source External Field or Condition Rule	Select *Exact Duplicate Match*.
Relational Operator	Select *equal to*.
Comparison Type	Select *Value specified in this filter*.
Comparison Value	Select the check box.

Related Information

Tasks

Create Business Process Condition Rules

Concept: Recruiting Agency Management

Workday enables you to manage your relationship with third-party recruiting agencies. You can create recruiting agencies and agency users, or you can assign the Recruiting Agency Administrator role to manage agencies and their user information.

Each recruiting agency has its own internal career site based on the Find Agency Jobs report. You can post jobs to the agency career site and create an agency-specific job posting template to control which information displays.

You can configure recruiting agencies to support confidential job postings and enable agency users to submit candidates to these job postings. To view confidential agency job postings, users must:

- Belong to the agency that the confidential job requisition was posted to.
- Have permission to view the confidential job requisition.

Recruiting agents with a Workday account can:

- Receive notifications about new job postings on the agency career site.
- Submit candidates to job postings using the agency career site or the *Submit Recruiting Agency Candidate* web service.

Candidates submitted by an agency user can create a Candidate Home account on your external career sites, where they can complete tasks and answer questionnaires.

Related Information
Tasks
Set Up Recruiting Agencies for Confidential Job Postings and Candidates on page 428

Example: Upload Multiple Workday Accounts for Recruiting Agency Users

Context

As the recruiting administrator for Global Modern Services, you want to upload 2 Workday accounts simultaneously for your newest external recruiting agency users, Kim Jin, and Marie Stanley.

Steps

1. Access the Create Recruiting Agency User task.

   Create agency users for Kim and Marie.
2. Access the View Reference IDs report.
   a) On the Business Object prompt, select *Recruiting Agency User*.
   b) Copy or export Kim and Marie's Recruiting Agency User IDs from the Reference ID Value column.
3. Access the Create EIB task.
   a) Name your EIB *Add Workday Account for Agency Users*.
   b) Select Inbound, and click OK.
   c) In the Get Data section, select *Add Workday Account (Web Service)* on the Web Service Operation prompt.
   d) Click Next and OK to advance to the View Integration System page.
   e) From the related actions menu of the integration system, select Template Model > Generate Spreadsheet Template.
   f) Select the Confirm check box, and click Submit.
4. Download the spreadsheet and replace the column header Academic_Affiliate_ID with Recruiting_Agency_User_ID.
5. Enter the required information for each agency user.

Option	Description
Spreadsheet Key	Enter a unique value for each row.
Recruiting_Agency_User_ID	The Reference ID value from the View Reference IDs report

6. Access the Launch/Schedule Integration task.
    a) In the Integration field, enter *Add Workday Account for Agency Users*.
    b) In the (Attachment) Add Workday Account (Web Service) row of the Integration Criteria grid, select:
        - Specify Value on the Value Type prompt.
        - Create Integration Attachment on the Value prompt.
    c) Select and upload your spreadsheet, and click OK.
    d) Click OK to run the integration.

Result

Access the View Recruiting Agency report to confirm that Kim Jin and Marie Stanley now have active Workday accounts.

Example: Enable Automatic Notifications for Recruiting Agency Users

This example describes how to configure Workday to send automatic email notifications when you:

- Create a Workday account for a recruiting agency user.
- Post a job to the recruiting agency career website.

Context

As the recruiting administrator for Global Modern Services (GMS), you want to create a Workday account for Alex, the newest hire at an external recruiting agency. You also want to send her a custom email notification with her sign-in details.

You also want to notify all users of that recruiting agency whenever you post a job to their career site.

Prerequisites

Create the GMS Recruiting: EMEA recruiting agency in Workday.

Steps

1. Access the Edit Tenant Setup - Notifications task.
    a) In the Default Email Settings section, from the Default SMTP Configuration prompt, select *Workday SMPT: Default SMTP Configuration*.
    b) In the Notification Delivery Settings section:
        - Select the Business Processes tab.
        - On the Custom Business Process Notifications row, select the Override Parent Notification Settings check box.
        - From the Rule prompt, select a routing rule that enables *Email* as a channel and *Immediately* as the email channel frequency.
2. From the related actions menu of the *Create Workday Account* business process definition, select Business Process > Add Notification.
    a) Enter an Effective Date.
    b) Select *Completed* from the Trigger on Status prompt.
    c) Select *Recruiting Agency User as Self* from the Group(s) prompt.
    d) In the Message Content section, add a subject and body for the notification email:
        - Subject: New Workday Account.
        - Body: This is an automatic notification that a Workday account has been created for you. You'll receive separate emails containing your username and password.

3. Access the Create Recruiting Agency User task.
    a) In the Recruiting Agency field, select *GMS Recruiting - EMEA* for the agency user's organization.
    b) In the Legal Name Information section, enter:
        - First Name: Alex.
        - Last Name: Morgan.
    c) In the Contact Information section, add a new Email and enter:
        - Email Address: alex.morgan@external-agency.com
        - Type: Work
        - Primary Work: Workday automatically selects this check box
4. From the agency user's related actions menu, select Security Profile > Create Workday Account.
    a) In the User Name field, enter alex.morgan.
    b) Select the Generate Random Password check box.
5. Access the Create Calculated Field task.

    Create a calculated field that returns all agency users that work for the agency.
    a) Enter:
        - Field Name: Agency Users for Recruiting Agency
        - Business Object: Post Job Event
        - Function: Aggregate Related Instances
    b) Click OK.
    c) On the Calculation tab, enter:
        - Source Field: Job Postings - Proposed
    d) Fields to Aggregate: Agency User Names
    e) Click Done.
6. From the related actions menu of the *Post Job* business process definition, select Business Process > Add Notification.
    a) Select an Effective Date.
    b) Select *Completed* from the Trigger on Status prompt.
    c) From the Recipients prompt, select *Agency Users for Recruiting Agency*.
    d) In the Message Content section, add a subject and body for the notification email:
        - Subject: Job Posting
        - Body: This is an automatic notification that a new job was posted to your external career site.

Result

When you create her account, Alex receives the custom email notification you set up, as well as 2 system-generated emails containing:

- Their user name.
- The random password.

Agency users from a specific agency receive an automatic email notification every time a job is posted to their agency career site.

Related Information

Tasks

Create Custom Notifications

Create Calculated Fields

Reference

Reference: Edit Tenant Setup - Notifications

Reference: Edit Tenant Setup - Security

Referrals and Endorsements

Setup Considerations: Referrals and Endorsements

You can use this topic to help make decisions when planning your configuration and use of referrals and endorsements. 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

Referrals enable workers to submit candidates to open job requisitions. Candidates can also identify a referring worker when they apply to a job posting. The worker they've identified can then optionally endorse the candidate's job application. You can also setup referral payment plans to award workers for referring or endorsing successful candidates.

Business Benefits

Referrals and endorsements enable you to:

- Reach qualified candidates who current workers already know and support.
- Maintain accurate records for reporting and compensation purposes.
- Process a one-time referral bonus payment to a worker who refers a hired candidate.
- Report on referred candidates who don't have job applications.

Use Cases

- Encourage workers to recommend qualified candidates by offering rewards for successful referrals and endorsements.
- Award points to your workers for sharing a job posting on social media.
- Rank your workers by their referral activity and process rule-based payments to the top referrers.

Questions to Consider

Question	Considerations
Do you want to differentiate between referral sources?	You can access the Maintain Recruiting Sources task to manage your sources and source types for referrals.
Do you want to award referral bonus payments to employees for endorsing candidates?	You can configure eligibility rules to include, exclude, or differentiate between endorsements and regular referrals. Use recruiting sources that map to these Workday-delivered sources: • Self Identified • Endorsement Denied

Question	Considerations
Do you want to enable referrals from social media channels?	You can use the Configure Social Sharing Targets task to enable the social media channels where workers can share job postings. You can enable each social media channel to be available only for specific countries.
Do you want to use referral payments?	Referral payment plans are optional. You can prevent the Referral Payment Plan prompt from displaying on job and evergreen requisitions.
How do you want to track how workers know their referral candidate?	Workday enables you to track the type of relationship between a worker and the candidate they referred. You can: • Define any number of referral relationships. • Require that a worker specifies a referral relationship.
Do you want to enable referrals to job areas as well as specific requisitions?	When you enable job areas on the Edit Tenant Setup - Recruiting task, workers can refer candidates to a job area, in addition to specific job requisitions.

Recommendations

Feature	Recommendations
Recruiting sources	Map your recruiting sources for employee referrals and self-identified referrals these Workday-delivered sources: • Employee Referral for referrals submitted by workers. • Self Identified for candidates who identify a worker to endorse them when they apply to a job.
Refer a Candidate business process	Workday recommends that you: • Use the default definition and don't add additional steps. • Set up a custom notification that triggers on completion to let the candidate know that someone has referred them. • Mark the Email field required for all users who create referrals. Marking this field will ensure that the referred candidates receive all email communications.

Requirements

Feature	Requirements
Referral ownership	Enable referral ownership in your tenant.

Feature	Requirements
Endorsements	Create recruiting sources mapped to these Workday-delivered sources: • Endorsement Denied • Self Identified Note: Configure an Endorsement Denied recruiting source to ensure that Workday removes the referral relationship between the worker and the candidate. This will ensure that payments to workers who declined to endorse the candidate won't be processed.
Referral payment plans.	Configure: • At least 1 amount-based one-time payment plan in the Referral category. • A *Request One-Time Payment for Referral by* Action step on the *Hire* business process.
Referral business processes	Configure these business process definitions: • *Endorse Candidate* • *One-Time Payment for Referral* • *Refer a Candidate*

Limitations

If you use referral payment plans, you can't split referral payments to a worker across multiple installments.

Tenant Setup

You can configure referral-related parameters on the Edit Tenant Setup - Recruiting task. You can specify 1 of these referral ownership levels:

- Candidate-level ownership, which enables you to see the worker who owns the prospect or candidate across all of their job applications.
- Job application-level ownership, which enables more granular referral rewards. Consider how you want ownership to work when 2 or more workers refer the same candidate to different job requisitions.

You can also specify an optional Duplicate Referrals Policy to prevent employee referrals in 1 of these situations:

- If the candidate already applied for the job requisition.
- If there's a duplicate prospect for the same job requisition or job area.
- If the person already exists anywhere in Workday.
- If the candidate has a duplicate referral with an active owner.

When you configure Candidate Level ownership and your Duplicates Referral Policy is set to Prevent referral if the candidate has a duplicate referral with an active owner, Workday:

- Prevents the referral from being created if a duplicate candidate exists and the candidate has an active candidate owner.
- Enables the creation of the referral if a duplicate candidate exists but the candidate owner has expired.

These tenant settings also impact referrals:

- Enable Recruiting Job Areas: Enables workers to submit a referral when no job openings match the candidate's skills.
- Enable Recruiting Referral Levels: Enables you to configure and track the relationship between a worker and the candidates they refer.

Security

Security	Considerations
Candidate Data: Employee Referrals domain in the Recruiting functional area	Enables you to view and modify information for referral ownership, referrals, and endorsements.
Employee Referrals domain in the Recruiting functional area	Enables you to refer candidates and view their referral activity when you add the All Employees security group to this domain.
Set Up: Social Sharing domain in the System functional area	Enables you to configure social sharing tasks and reports.
Social Share domain in the Recruiting functional area	Enables workers to share job postings on social media when you add the All Employees security group to this domain.
Refer a Candidate business process security policy	Configure security for these initiating actions: • Refer a Candidate • Refer a Candidate from Internal Career • Refer a Candidate (Web Service). Enable workers, contingent workers, and pre-hires to refer candidates by selecting one or more of these employee security groups: • Employee as Self • Contingent Worker as Self • Pre-Employee as Self • Pre-Contingent Worker as Self
One-Time Payment for Referral business process security policy	Enable one-time payments for referrals by configuring the *Request One-Time Payment for Referral by* initiating action.

Business Processes

Business Process	Considerations
Endorse Candidate	To ask a nominated worker to endorse a candidate's job application, you can add a *Send Endorsement Request* Action step on any subprocess of the *Job Application* business process.
One-Time Payment for Referral	You can enable referral payments by adding a *Request One-Time Payment for Referral by* Action step on the *Hire* business process, after the completion step. Workday doesn't automatically cancel future dated One-Time Payments to terminated workers. We recommend adding a notification on the

Business Process	Considerations
	Termination business process to remind the appropriate role to rescind any unprocessed payments to the terminated worker. If the referred worker gets terminated before the One-Time Payment is due, Workday removes all future dated One-Time Payments to the referring worker.
Refer a Candidate	Workday only recognizes prospects that you create using the *Refer a Candidate* business process as referrals once the business process event is complete.

Reporting

Workday provides reports that offer insights into the referral activity of your company. For a list, access the Workday Standard Reports report and select the *Recruiting* category.

Integrations

You can use the *Refer a Candidate* web service to:

- Refer a candidate to multiple job requisitions and job areas.
- Build an inbound EIB integration to upload referrals in bulk.

Connections and Touchpoints

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.

Workday ensures that the referrals policy that you configure on the Edit Tenant Setup – Recruiting task persists when you opt in to the Duplicate Management Framework. The framework identifies duplicates based on your configured duplicate referrals policy and match rules. Workday flags any potential duplicates for referrals when you use these tasks:

- Create a Referral
- Refer a Candidate

Related Information

Tasks

Maintain Recruiting Sources on page 272

Invite Referrals to Apply on page 443

Reference

Reference: Edit Tenant Setup - Recruiting

Steps: Set Up Referrals

Context

Setting up referrals enables workers to:

- Refer candidates to your company.
- Invite candidates to apply to open positions.

Workday supports these referral types:

Type	Description
Direct Referral	Referrals created using the: • Create a Referral task, which enables workers to provide information about candidates like their contact details, and their relationship to them. • Refer a Candidate task, which enables workers to refer candidates for specific job requisitions or to a manager. • *Refer a Candidate* web service, which enables workers to refer candidates for specific job requisitions or to a manager using a web service.
Referral Application	An application where a worker in your organization is the referring worker.
Referral Hired	A successful hire from an application where a worker in your organization is the referring worker.
Social Media Referral	Referrals who apply using links that workers have posted on social media.
Spotlight Job	When a job requisition flags a position as a Spotlight Job.
Self-Identified Referral (Endorsement)	Where candidates, during the job application process, identify workers they know in your organization.

Steps

1. Edit Domain Security Policies.

   Configure the security policies for these domains in the Recruiting functional area:

   - *Candidate Data: Employee Referrals*
   - *Candidate Data: Referral Candidate Ownership*
   - *Employee Referrals*
   - *Social Share*
2. Access the Edit Tenant Setup - Recruiting task.

   Configure the:

   - Referral ownership type and period.
   - Duplicate referrals policy for employee referrals.

   See Reference: Edit Tenant Setup - Recruiting.
3. Access the Maintain Referral Relationships task.

   Configure referral relationships to identify the type of connection between a candidate and their referring worker.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
4. Maintain Recruiting Sources on page 272.

   You can map only 1 Workday-delivered recruiting source as a referral source.

5. Configure these business process definitions:
   - *One-Time Payment for Referral*
   - *Refer a Candidate*

   See Steps: Configure Business Process Definitions.
6. Edit Business Process Security Policies.

   Configure these business process security policies:
   - *One-Time Payment for Referral*
   - *Refer a Candidate*
7. (Optional) Create Custom Notifications.

   Set up email notifications to personal or work email addresses.

   You can override the email template. If you use Notification Designer, you can create a template and enable it for the *Custom Business Process* notification category. You can use the notification template to send notifications when using the *Refer a Candidate* business process.
8. (Optional) Set up referral questionnaires.

   Add *Allow Questionnaire* as a step on the *Refer a Candidate* business process to enable recruiters to ask referring workers questions about their candidate.
9. (Optional) Access the Maintain Referral Activity Points task.

   Configure the number of points that Workday assigns to workers for completing set stages of the recruiting and referral processes.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
10. (Optional) Set up candidate endorsements.

    Set up endorsements to enable candidates to enter the name or email of a referring worker when they apply to a job posting.

    See Steps: Set Up Endorsements on page 440.
11. (Optional) Hide or Require Optional Fields for Referrals on page 443.
12. (Optional) Access the Edit Referral Candidate Owner task.

    Update these details for an existing referral candidate:
    - Referral candidate ownership.
    - Ownership expiry date.

Result

Workday recognizes prospects that you create using the *Refer a Candidate* business process as referrals once the business process event is complete.

You can only merge or unmerge records when you’ve completed all associated referral events.

When you configure candidate-level ownership and view the candidate profile of a candidate referred using the Refer a Candidate task, Workday displays these updated fields:

- Candidate Owner
- Ownership Expiry Date

When you configure Job Application Level ownership, the Referral Details tab on the candidate profile displays these fields:

- Current Job Application Owner
- Ownership Start Date
- Ownership Expiry Date

When you don't configure any ownership level, the Referral Details tab displays the Current Job Application Owner.

Next Steps

Configure Workday to process a payment to the referring worker when their candidate gets hired.

Access the:

- Referral Activity Leaderboard report to view workers' referral activity points.
- Referral Ownership grid on the Referral Details tab on a candidate's profile to view details of previous candidate owners.

Related Information
Tasks
Steps: Set Up Recruiting on page 191

Steps: Set Up Endorsements

Prerequisites

- Security: These domains in the System functional area:
  - *Business Process Administration*
  - *Manage: Business Process Definitions*

Context

Workday enables external candidates to enter the name or email of a company worker they know when applying to a job. If the information matches an existing worker, the worker receives a request to endorse the candidate's job application.

If the worker:

- Accepts the endorsement request, Workday creates a referral record for the candidate's job application.
- Declines the endorsement request, Workday deletes the association between the worker and the candidate's job application.

Workday blocks existing endorsement requests and doesn't allow any new endorsements if:

- The candidate is hired.
- The job requisition is filled or closed.

Workday doesn't delete endorsement requests from the worker's My Tasks, even when it's no longer possible to endorse that candidate.

If the candidate doesn't have an active worker or pre-hire record, you can delete all endorsement information from the candidate's profile and job application.

Note: Workday stores endorsement information for dispositioned candidates.

Steps

1. Create Custom Business Processes.

   Configure the *Endorse Candidate* business process in the Recruiting functional area.

   Assign the *Endorse Candidate* action step to the appropriate security groups.

   Example: If you want employees to endorse candidates, assign the group *Employee As Self* to the *Endorse Candidate* action step.

2. Edit Business Process Security Policies.

   Access the Business Process Security Policies for Functional Area report and enter these details:

Option	Description
Functional Area	*Recruiting*
Business Process	*Endorse Candidate*

   In the Who Can Do Action Steps in the Business Process section, add or remove security groups for the Endorse Candidate action step.

   (Optional) In the Policy Restrictions section, select the Disable Comments check box. This prevents Workday from displaying 2 comment fields for candidate endorsements.
3. Activate Pending Security Policy Changes.
4. (Optional) From the related actions menu of the *Endorse Candidate* business process, select Business Process > Maintain Help Text.

   Enter instructional text that explains the endorsement process for a referring worker.
5. Edit Business Processes.

   Add the *Send Endorsement Request* action step to the appropriate subprocess on the *Job Application* business process definition where you want a nominated worker to endorse a candidate's job application.

Result

When a candidate identifies a worker they know at your company, the worker receives a request to endorse that candidate.

Workday displays positive endorsement details on the candidate's:

- Profile.
- Job application.

Next Steps

Configure Workday to process a one-time referral payment to the worker if you hire the candidate they endorsed. You can also use eligibility rules to specify how and when to process this payment.

Steps: Set Up Referral Payment Processes

Context

Referral payment processes offer an easier and more convenient way to reward workers for successful referrals. Set up the *One-Time Payment for Referral* business process so you can:

- Manage your referral payment processes.
- Generate referral payments to workers if you hire a candidate they referred.

Steps

1. (Optional) Access the Create One-Time Payment Plan Schedule task.

   Create a plan schedule for referral payments. After a successful hire, you can delay paying the referring worker by a number of days, months, or years from the Date of Hire.

   Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.

2. (Optional) Create Eligibility Rules for Compensation on page 986.

   Configure rules to determine which workers are eligible to receive the one-time payment for the referral.

   Example: The referring worker is in Paris and is in the Engineering organization.
3. Create One-Time Payment Plans on page 1126.

   Create an amount-based plan for referral payments. Select:

   - Referral on the Category prompt.
   - (Optional) A referral Payment Schedule. This section displays after you select a Category.
4. Create Job Profiles on page 573.

   Select the payment plan that you want to associate with the job profile from the Referral Payment Plan prompt.
5. Create and Edit Job Requisitions on page 611.

   When you create a job requisition from a job profile, Workday automatically associates the payment plan of the job profile with the job requisition.

   You can also select a payment plan from the Referral Payment Plan prompt in the Recruiting Information section.
6. Access the Create Business Process Definition (Default Definition) task.

   Create the default definition for the *One-Time Payment for Referral* business process if it doesn't exist in your tenant.
7. Edit Business Process Security Policies

   Configure the security policy for the *One-Time Payment for Referral* business process.
8. Add the *One-Time Payment for Referral* subprocess to the *Hire* business process.
9. (Optional) Access the Edit Tenant Setup - HCM task.

   Select the Route Business Processes Based on Costing Overrides option in the Compensation section. If you use worktags on the *One-Time Payment for Referral* business process, Workday routes steps to the managers associated with the worktags.
10. (Optional) Hide or Require Optional Fields.

    If you don't want to use referral payment plans, you can hide the Referral Payment Plan field on job requisitions.

    a) Select the Pre-Hire Process functional area.
    b) Select an option:

       - Job Requisition
       - Job Requisition Change
       - Job Requisition Details for Composite View

Result

Workday creates a one-time payment to a referring worker if you hire their referral. The candidate owner receives the one-time referral payment for any candidate job application that reaches the *One-Time Payment for Referral* subprocess on the *Hire* business process. When you enable the Referral Ownership Level on the Edit Tenant Setup - Recruiting task, the worker named on the Referred By field receives the one-time referral payment.

If you terminate a referred worker, Workday removes any future dated referral payments to the referring worker.

Changes made to referral payment plans don't impact in-progress and historical job requisitions.

Next Steps

Manually review and approve payments before Workday processes them.

Hide or Require Optional Fields for Referrals

Prerequisites

Security: *Set Up: Configure Optional Fields* domain in the System functional area.

Context

You can hide or require fields on these referral tasks to control what information you collect:

- Create a Referral.
- Refer a Candidate.

Steps

1. Access the Configure Optional Fields task.
2. Select one of these options on the By Functional Area prompt:
    - *Create a Referral*.
    - *Refer a Candidate*.

    Workday recommends that you hide and require the same fields for both of these functional areas to ensure data consistency.
3. As you complete the task, consider:

Option	Description
Email	We recommend that you require this field to ensure that the candidate receives all communications.
Relationship	Require this field to track how workers know the candidates that they referred.

4. Configure visibility for the Referral Payment Plan field.

    You can hide or require the Referral Payment Plan field on job requisitions. Select one of these functional areas:
    - *Job Requisition*
    - *Job Requisition Change*

    If your company doesn't use referral payment plans, hide this field for all users.

Related Information
Tasks
Hide or Require Optional Fields

Invite Referrals to Apply

Prerequisites

- Configure email notifications for candidates.
- Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can configure Workday to automatically notify a candidate when a worker refers them for a job. This notification can also include a link to the job posting that the candidate can use to apply.

Steps

1. From the related actions menu of the *Refer a Candidate* business process, select Business Process > Add Notification.
2. As you complete the task, consider:

Option	Description
Recipient(s)	Select *External Candidate for Business Process*.
Message Content	Use the Job Posting Referral URL field to include a link to the job posting.

Result

The referred candidate receives an email notification with a link where they can apply to the job posting. These business process notifications don't display on the candidate's job requisition.

Related Information
Reference
Reference: Edit Tenant Setup - Notifications

Manage Unmatched Endorsement Requests

Prerequisites

- Configure the *Endorse Candidate* business process in the Recruiting functional area.
- Security: *Employee Referrals* domain in the Recruiting functional area.

Context

If Workday can't match a candidate's self-identified referrer with an existing worker, you can edit the job application and enter the worker's correct name. You can then send the worker a request to endorse the candidate's job application.

You can create a custom report to display all job applications with a self-identified referral that doesn't match an existing worker. Job applications with unmatched self-identified referrals store the name or email that the candidate entered in the Referred by (unmatched) field.

Steps

1. Access the Create Custom Report task.
    a) Create an Advanced custom report based on the Job Applications data source, and clear the Optimized for Performance check box.
    b) Select All Job Applications from the Data Source Filter prompt.
    c) In the Columns grid, add a new row for the Referred by (unmatched) field.

       Add other fields as required. Example: Candidate Name, Job Application.
    d) In the Filter section, select:
        - Referred by (unmatched) on the Field prompt.
        - is not blank on the Operator prompt.
2. Run the custom report.
3. From a candidate's related actions menu, select Candidate Actions > Edit Job Application.
    a) Select the job application to edit from the Job Applications for Candidate prompt.
    b) Edit the candidate's job application and enter the correct worker's name in the Referred by field.
4. From the candidate's related actions menu, select Candidate Actions > Send Endorsement Request.

Result

- Workday creates a link between the worker and the candidate's job application.
- The worker receives a request to endorse the candidate's job application.

Job Applications

Steps: Set Up Job Applications

Context

With Workday, you can configure the job application to collect only the information you want from a candidate.

Steps

1. Create External Career Sites on page 379.

   Define the sections you want included in the job application a candidate completes when they apply for a job using an external career site. Complete the Create External Career Site task sections that begin with the word Apply.
2. Steps: Set Up Job Application Templates on page 447

   Define what resume data you collect on a job application.
3. Set up candidate assessments.

   See Steps: Set Up Assessments for Candidates on page 463.
4. Set up questionnaires.

   See Steps: Set Up Questionnaires for Recruiting on page 455.

Steps: Manage Job Applications

Prerequisites

Set up job applications.

Context

Use this process flow to manage job applications.

Steps

1. Create and Edit Job Requisitions on page 611.
2. Create and Edit Evergreen Requisitions on page 238.
3. Post Jobs on page 418.
4. Candidates apply to jobs using external or internal career sites.

   Job applications created by:

   - External candidates applying to jobs use the job application template associated with the job posting.
   - Internal candidates applying to jobs use content that displays on their worker profile, such as education, job history, and skills. The job application displays using the job application template associated with the internal job posting.
5. Recruiters create job applications on behalf of candidates.

   The Create Job Application task uses the job application template that is associated with the evergreen or job requisition.

6. View the template assigned to a requisition on the Details profile group on the requisition profile.

Next Steps

To meet compliance requirements, purge the job application data of former workers, active workers, or candidates if you no longer need it. Use the Purge Person Data task and the *Job Applications for Purging* data source for your custom report.

Related Information
Tasks
Steps: Purge Person Privacy Data

Steps: Enable Candidates to Withdraw Their Job Applications

Context

You can set up Workday to enable candidates to withdraw their own job applications, improving recruiter productivity. Candidates can withdraw from consideration using the:

- Withdraw button next to their job application for external candidates with a Candidate Home account.
- Withdraw Application task for internal candidates.

Steps

1. Edit Domain Security Policies.

   To enable internal candidates to withdraw their job applications, add these security groups to the *Internal Careers* domain:

   - All Contingent Workers.
   - All Employees.
2. Access the Maintain Recruiting Dispositions task.

   Select the Candidate Withdrawal check box for the reason you want to use when a candidate withdraws their job application. The reason you select must:

   - Be active.
   - Map to *Declined by Candidate*.

   The Candidate Label Override is the label candidates see in any communications that they receive related to their job application.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
3. Edit the *Job Application* business process definition.

   Add the candidate withdrawal reason you configured to the Possible Dispositions grid for each stage where you want a candidate to be able to withdraw their job application. If a stage has no candidate withdrawal disposition, the Withdraw button doesn't display for external candidates.

   See Steps: Configure the Job Application Business Process on page 197.
4. (Optional) Create Custom Notifications.

   You can configure a custom a notification on the *Job Application* business process to let you know when a candidate withdraws their job application. Configure the notification to trigger only for candidate withdrawal reasons.
5. Create External Career Sites on page 379.

   Enter a Withdraw Confirmation Message in the Candidate Home section. This message displays to external candidates when they withdraw their job application.

Result

When a candidate withdraws their job application, Workday:

- Sets their status to the one defined as candidate withdrawal status.
- Closes the job application event.

Next Steps

Review the status of candidate job applications on the:

- Candidate profile.
- Candidates profile group of the job requisition profile.

You can also create a custom report that includes the Candidate Withdrawn report field.

Steps: Set Up Job Application Templates

Context

Workday enables you to create job application templates to collect only the information from a candidate that is relevant to a specific evergreen or job requisition. You can hide or require sections or fields for all or for a specific security group.

Steps

1. Edit Domain Security Policies.

   Set up security for these domains in the Recruiting functional area:

   - *Candidate Data: Attachments*
   - *Candidate Data: Edit Job Application*
   - *Candidate Data: Job Application*
   - *Submit Recruiting Agency Candidate*
2. Create Job Application Templates on page 448.

   Define the sections and fields that you want hidden or required on job applications.
3. Access the Create Job Requisition Condition Rule task.

   Create the condition rules that Workday uses to determine which job application template to associate with an evergreen or job requisition. Workday delivers a default template called Job Application Default Template.

   You can use these report fields when creating condition rules:

   - Current Job Application Template on the *Job Requisition* business object.
   - Current Job Application Template on the *Job Applications, Prospects and Referrals* business object.
   - Job Application Template – Current on the *Job Requisition Event* business object
   - Job Application Template – Proposed on the *Job Requisition Event* business object
   - Job Requisition Has/Had Job Applications on the *Job Requisition* business object

   Security: These domains in the Recruiting and Talent Pipeline functional areas:

   - *Set Up: Job Postings*
   - *Set Up: Recruiting*
4. Access the Maintain Job Application Templates task.

   Assign a job application rule to a job application template. When you create an evergreen or job requisition, Workday evaluates the rules in the order they display. When a rule is met, Workday assigns that template to the requisition. When no rule is met, Workday assigns the default template.

   Security: *Set Up: Recruiting* domain in the Recruiting and Talent Pipeline functional areas.

5. (Optional) Edit Business Processes.

   Configure these business processes to include the *Review Job Application Template* step, which enables you to change the assigned job application template:

   - *Evergreen Requisition*.
   - *Job Requisition*.

   Add this step after the completion step but before the *Post Job* step. Workday will send the Review Job Application Template task to My Tasks for the security group assigned to the step.

Result

When you create an evergreen or job requisition, Workday uses the Maintain Job Application Templates task to evaluate which template to assign to the requisition. If you added the Review Job Application Template as a step to one or both of the business processes, Workday sends a new Review Job Application Template task to the assigned security group's My Tasks. This task enables you to change the assigned template.

Workday also adds a new Job Application Template section (secured to the Staffing Actions: Job Requisition Job Application Template domain) to these tasks that also enables you to change the template:

- Edit Evergreen Requisition.
- Edit Job Requisition.

You can view the template assigned to a requisition on the Details profile group on the requisition profile.

Related Information
Tasks
Create Business Process Condition Rules

Create Job Application Templates

Prerequisites

Security: *Set Up: Recruiting* domain in the Recruiting and Talent Pipeline functional areas.

Context

Job application templates enable you to control the information you gather about a candidate from a job application when:

- Candidates apply to a job using an external career site.
- Recruiters or administrators use the Create Job Application task or the Attachments profile group of a job application.

A template enables you to select the sections to display on a job application, and Workday includes a Default Section Label for each section:

- Certifications
- Education
- Languages
- Resume/CV
- Resume Parsing
- Skills
- Websites
- Work Experience

You can use the Section Label Override fields to change the section labels. In the Instructional Text column, rich text fields enable to you to add instructions and additional information for each section. The text configured in the Instructional Text fields displays on the My Experience page of a job application.

You can include or hide sections and fields within sections based on security groups.

Steps

1. Access the Create Job Application Template task.
2. As you complete the task, consider:

Option	Description
Section Label Override	Text that you enter here replaces section label text on the My Experience page of a job application. The candidate record also displays the Section Label Override text. You can configure the plain-text editable fields with up to 100 characters.
Instructional Text	Text that you enter here displays below the section label text. Configure these rich-text editable fields with up to 500 characters.
Criteria	If you select *Security Group*, Workday enables you to select options from the Hidden For and Required For prompts.
Enforce Required in Web Services	Selecting *Required for All* enforces the criteria defined by the job application template in the *Put Candidate* and *Submit Agency Candidate* web services. Doesn't apply to the Resume/CV section.
Hidden For Required For	Hide or require a section or fields for selected security groups. Workday automatically checks for conflicts between your selected criteria.

Result

When you select *Hide for All* in the Criteria column for the From or To fields in the Education section, Workday suppresses this information in any associated:

- Job applications.
- Report fields.
- Web services.

When you hide resume parsing for external candidates, Workday doesn't display the:

- Autofill with Resume button on custom branded external career sites.
- Quick Apply page on external career sites without custom branding.

For the *Put Candidate* web service, don't remove the Resume_Data section when the Enforce Required in Web Services check box and Required For are selected for any section or field.

Next Steps

To translate configured text in Section Label Override and Instructional Text fields, use the Translate Job Application Template report.

To manage job application templates, use the Edit Job Application Template task. Workday uses the job application template on the requisition at the time of posting. To use the updated template for job applications, edit the job requisition and select Use Updated Version of Template check box in Job Application Template section. Then you can unpost and repost the job requisition.

Troubleshooting: Automatic Stage Routing Not Working

Automatic Stage Routing is not moving the job application to the next stage of the *Job Application* business process as expected.

Cause: In order for Automatic Stage Routing (ASR) to trigger correctly:

- All Conditions listed on the Automatic Stage Routing stage need to be met.
- Conditions listed on the Next Possible Step of the *Job Application* business process stage need to be met.
- The step where Automatic Stage Routing is enabled must be completed.

Example: Automatic Stage Routing is set to move a job application from the *Review* stage to the *Interview* stage.

1. Access the Job Application business process Review > Automatic Stage Routing.
2. Ensure that any condition rules for Automatic Stage Routing to trigger are met.
3. Check that condition rules on the Next Possible Step on the *Review* stage that will allow a move from *Review* to *Interview* are also met.

Solution: Consider removing all condition rules systematically to test where the Automatic Stage Routing conditions are failing.
Related Information
Tasks

Steps: Manage Job Applications on page 445

Troubleshooting: Unable to Decline or Move a Job Application Forward

You want to Move Forward a job application but there are no next steps options to select. Similarly, you want to Decline a job application but the expected next step or Disposition Reason are not available for you to select.

Cause: There is a condition rule on the *Job Application* business process stopping you from taking action. If any of the conditions listed on the Possible Next Steps or Possible Dispositions section are not met, you will not be presented with the next steps options when you select Move Forward or Decline on a job application.

Solution: You need to review the condition rules on the *Job Application* business process.

Steps

1. From the related action menu of the Job Application event, select Business Process > View Definition.
2. Select the tab of the stage where you are taking action. Example: If you want to Move Forward the job application on the Interview stage, select the Interview tab.
3. Review all the conditions rules on the Possible Next Steps or the Possible Dispositions sections.
4. Verify that the role taking action on the job application is included in the security Group assigned to the Possible Next Steps section.

Related Information
Examples

Troubleshooting: Automatic Stage Routing Not Working on page 450

Questionnaires

Setup Considerations: Questionnaires for Recruiting

You can use this topic to help make decisions when planning your configuration and use of recruiting questionnaires. 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

Recruiting questionnaires in Workday enable you to gather and collate candidate, recruiter, and interviewer data. You can issue questionnaires at any stage of the recruiting process.

Business Benefits

- Improved Recruiting Efficiency: Gather key details up front to reduce follow-ups. Example: Candidates submit availability and work status with the job application.
- Stronger Compliance and Reporting: Collect structured data to support legal and reporting requirements.
- Better Team Collaboration: Share responses with hiring teams to align on candidate strengths and gaps.
- Personalized Experience: Tailor questions to match the role, location, or business needs.
- Consistent Candidate Evaluation: Ask every applicant the same questions for fair, uniform assessment.
- Efficient Screening and Selection: Example: Assign scores and weights to questions to identify top applicants quickly.

Use Cases

- Candidates Pre-Screening: Collect work eligibility data to filter out ineligible candidates.

  Example: Ask if candidates have legal authorization to work in the country.
- Interview Preparation: Provide hiring managers candidate responses in advance to help guide interviews.

  Example: Share responses about leadership experience before a manager-level interview.
- Role-Specific Assessments. Include job relevant questions for candidates.

  Example: Ask software engineers to describe a recent coding challenge they solved.
- Localization and Compliance: Add region-specific legal or policy questions.

  Example: Ask EU candidates if they consent to data processing under GDPR.
- Capture Candidate Preferences: Gather information on location, salary, or start date preferences.

  Example: Ask candidates if they are open to relocating or working remotely.
- Supporting Internal Mobility: Assess internal candidates' readiness and career progression goals.

  Example: Ask internal candidates what skills they want to develop in their next role.

- Manage High-Volume Recruiting: Use structured questions to efficiently screen large applicant pools.

  Example: In a retail hiring campaign, ask about weekend availability and prior customer service experience.

Questions to Consider

Question	Consideration
What kind of questionnaires do you want to create?	You can create primary questionnaires to ask candidates general questions. You can create secondary questionnaires to ask more specific questions, such as questions about job location. Supplementary questionnaires enable recruiters to: • Create and customize questionnaires and add them to job requisitions. • Ask candidates additional questions. • Use nested branching functionality to configure follow-up questions to gather more detailed information.
How do you want to view questionnaires?	To display questionnaires automatically on job or evergreen requisitions that use that job profile, set a condition rule on the Maintain Job Requisition Questionnaire Defaults task. If you update any of the fields on the job requisition before submitting it, Workday: • Runs the condition rules again. • Overrides any questionnaires that you selected, depending on your defaulting rules. You can also access the View Questionnaire report to view and preview completed questionnaires.
How do you want to filter eligible and ineligible candidates?	You can assign points to multiple choice questions to eliminate ineligible candidates and advance high scoring candidates. Example: A candidate gets low scores because of age threshold. Workday eliminates the candidate. You can also create a branching question for possible answers and assign points to possible responses.

Recommendations

Workday recommends that you create question tags to help you search and keep track of questions. Example: Create question tags for internal and external questions so that you can easily search for these question types.

To ensure that candidates, complete a questionnaire, you can add the *Complete Questionnaire* action step on any subprocess of the *Job Application* business process. Workday recommends that you add this step before the *Make Decision* step.

When using questionnaires on an external career site, Workday recommends that you keep the total number of questions, including branched questions, to under 100 questions.

Requirements

No impact.

Limitations

If you add a *Complete Questionnaire* step to the *Interview* business process, you can't send questionnaires to the groups specified in the *Schedule Interview Team* step. You can associate a questionnaire with the *Schedule Interview* and *Manage Interview Feedback* business process steps of the *Interview* business process so that interviewers receive the questionnaire.

Tenant Setup

To enable changes to primary and secondary questionnaires, select the Enable Primary and Secondary Questionnaire Removal or Replacement on Evergreen and Job Requisitions check box under the Job Requisition section of the Edit Tenant Setup - HCM task.

Security

Domains	Considerations
Candidate Data: Questionnaires in the Recruiting functional area.	Provides access to questionnaire responses. You can use segment-based security groups to determine access to questionnaire responses.
Candidate Data: Questionnaire Total Score in the Recruiting functional area.	Provides access to the total score of a questionnaire on the Job Requisition composite view.
Configure Questions for Business Process and *Configure Questionnaires for Business Process* in the System functional area.	Enables you to manage access to supplementary questionnaires. Provides access to these tasks during the *Supplementary Questionnaires for Job Requisition* event: • Create Questions • Create Questionnaires
Set Up: Questionnaire Calc Fields in the Recruiting and Talent Pipeline functional areas.	Enables you to create a question report field for a question from the related actions menu of the question.
Set Up: Recruiting domain in the Recruiting functional area.	Enables you to add eligibility questions to job applications for external candidates.
Staffing Actions: Job Requisition Job Questionnaires in the Staffing functional area.	Provides access to job requisition questionnaires and the questionnaire sections on these tasks: • Create Job Requisition. • Edit Job Requisition. Provides access to job requisition questionnaires and controls whether the Questionnaire section displays on the Create Job Requisition and Edit Job Requisition tasks.

Domains	Considerations
Questionnaire in the System functional area.	Provides access to all tasks and reports related to configurable questionnaires.
Questionnaire Creation and Distribution in the System functional area.	Enables you to access the Maintain Questionnaires task and create, edit, delete, view, and preview questionnaires.
Question Library in the System functional area.	Provides access to all tasks and reports related to questions and question tags.
Questionnaire Results in the System functional area.	Provides access to all the tasks and reports related to accessing the results and the attachments for a questionnaire.

Business Processes

Business Processes	Considerations
Job Requisition	To add or update questionnaires assigned to job or evergreen requisitions, you can configure the *Job Requisition* business process and security policy for the *Staffing Actions: Job Requisition Job Questionnaires* domain in the Staffing functional area.
Supplementary Questionnaires for Job Requisition	Configure this business process to enable recruiters to create supplementary questionnaires on job and evergreen requisitions.

Reporting

Reports	Considerations
View Questionnaire	View questionnaires you have access to.
View Questionnaire Security Segment	Enables you to identify who has access to questionnaire responses.

Integrations

No impact.

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.

Related Information

Concepts

Concept: Segmented Security for Recruiting Questionnaires on page 459

Tasks

Configure Supplementary Questionnaires for Recruiting on page 456

Configure the Interview Business Process on page 482

Reference

Workday 2021R2 What's New Post: Nested Branching Questions for Supplementary Questionnaires

Steps: Set Up Questionnaires for Recruiting

Context

You can ask candidates to complete questionnaires when they:

- Apply for a job on your internal or external career site.
- Reach any stage in the recruiting process. To do this, external candidates must have a Candidate Home account.

Steps

1. Edit Domain Security Policies.

   Configure security for these domains:

   - *Candidate Data: Questionnaires* and *Candidate Data: Questionnaire Total Score* domains in the Recruiting functional area.
   - *Questionnaire*, *Questionnaire Creation and Distribution*, and *Questionnaire Results* domains in the System functional area.
   - *Staffing Actions: Job Requisition Job Questionnaires* in the Staffing functional area.
2. Create your questionnaires.

   See: Steps: Create and Manage Questionnaires.
3. Set up segmented security for Recruiting questionnaires.

   See Example: Configure Segmented Security for Recruiting Questionnaires on page 459.
4. Edit Business Processes.

   To have candidates complete a questionnaire, add the *Complete Questionnaire* action step to any business process that can be a subprocess of the *Job Application* business process. Workday recommends that you add this step before the decision step.

   If you want to send the questionnaire to:

   - External candidates, enter *Candidate As Self* in the Group column. The candidate must have a registered Candidate Home account. Questionnaire requests also display as tasks for a candidate on Candidate Home.
   - Internal candidates, enter *Employee As Self* or *Contingent Worker As Self* in the Group column.

   If you add a *Complete Questionnaire* step to the *Interview* business process, you can't send questionnaires to the groups specified in the *Schedule Interview Team* step.
5. (Optional) Configure Supplementary Questionnaires for Recruiting on page 456.
6. Access the Edit Tenant Setup - HCM task.

   Manage tenant-wide settings in the Job Requisition section. Configure the Enable Primary or Secondary Questionnaire Removal or Replacement on Evergreen and Job Requisitions setting to enable changes to questionnaires, even if candidates have already applied.
7. (Optional) Access the View Job Requisition Defaults task.

   View all defaults for assessments and questionnaires.
8. Access the Maintain Job Requisition Questionnaire Defaults task.

   Create and maintain condition rules and defaults for questionnaires.
9. Create and Edit Job Requisitions on page 611.

   You can select up to 4 questionnaires when creating a job or evergreen requisition. Workday also populates questionnaires using condition rules.

10. Access the Maintain Questionnaires task.

    Select Question > Create Report Field from the related actions menu of a question.

    Generate a calculated report field for any question and its answers. You can use these report fields to:

    - Include questionnaire responses on the Candidate List grid.
    - Create condition rules for business processes based on questionnaire responses.

    Security: *Set Up: Questionnaire Calc Fields* domain in the Recruiting and Talent Pipeline functional areas.

Next Steps

View questionnaire responses for each job requisition on the Questionnaire Results tab of the candidate profile.

Related Information

Concepts

Concept: Complete Questionnaire Step

Tasks

Steps: Set Up Recruiting on page 191

Change Questionnaires Assigned to Job Requisitions on page 458

Reference

Workday 31 What's New Post: Evergreen and Job Requisition Rules

Workday 2021R2 What's New Post: Nested Branching Questions for Supplementary Questionnaires

Configure Supplementary Questionnaires for Recruiting

Prerequisites

Set up the *Supplementary Questionnaires for Job Requisition* business process and security policy in the Recruiting functional area.

Add the *Supplementary Questionnaires for Job Requisition* business process as a subprocess on the *Job requisition* and *Evergreen Requisition* business processes.

Security: These domains in the System functional area:

- *Configure Questions for Business Process*
- *Configure Questionnaires for Business Process*
- *Setup: Configure Optional Fields*

Context

You can configure supplementary questionnaires to enable recruiters to create questions and questionnaires while creating job and evergreen requisitions.

Steps

1. Access the Configure Optional Fields task to enable the Supplementary Questionnaires for Job Requisition fields.
2. Select By Functional Area > Recruiting.

   Enable the supplementary questionnaire fields on 1 or both of these options:

   - Evergreen Requisition
   - Evergreen Requisition Change

3. Select By Functional Area > Pre-Hire Process.

   Enable the supplementary questionnaire fields on 1 or more of these options:

   - Job Requisition
   - Job Requisition Change
   - Job Requisition Details for Composite View

Result

When you're creating job or evergreen requisitions, you can:

- Add questions or questionnaires.
- Select supplementary questionnaires.

You can add supplementary questionnaires by selecting Job Change > Configure Supplementary Questionnaires on the related actions of the requisition.

You can configure up to 6 levels of branching questions to add to supplementary questionnaires.

When using questionnaires on an external career site, Workday recommends that you keep the total number of questions, including branched questions, to under 100 questions.

Example

Amy is creating a job requisition to recruit for an IT Support Worker. This position requires weekend work but there are no questions about weekend work available to select. Amy creates new supplementary questions to ask applicants about their ability to work weekends. These questions display as a separate questionnaire page when applicants are applying to the job requisition.

Next Steps

You can use the Maintain Questionnaires task to inactivate supplementary questionnaires when you no longer require them.

Related Information

Tasks

Steps: Create and Manage Questionnaires

Configure Questionnaires and Questions

Hide or Require Optional Fields

Reference

Workday 2021R2 What's New Post: Nested Branching Questions for Supplementary Questionnaires

Add Eligibility Questions to Job Applications

Prerequisites

Security: *Set Up: Recruiting* domain in the Recruiting functional area.

Context

You want to screen external candidates who submit job applications to ensure that they're eligible for consideration for employment. Example: The job is in Dublin, Ireland, you want to advance candidates that are legally eligible to work in the European Union.

You can have them answer these eligibility questions:

- Are you at least 18 years of age? Or if under age 18, can you provide work permits?
- Are you legally eligible to work in the country to which you're applying?
- Are you willing to relocate?

- Do you have relatives who work for our company?
- Do you require sponsorship?
- Have you been convicted of a felony?
- Have you been previously employed by our company?
- Can we contact you at your current place of employment?
- What is the notice period that you need to give your current employer?
- What is your current annual salary?
- What is your minimum annual salary requirement?
- When are you available to start?

Example: The age eligibility field maps to the response to the question: Are you at least 18 years of age? Or if under age 18, can you provide work permits?

Steps

1. Create a questionnaire that includes 1 or more eligibility questions.
2. Access the Map Job Application Questions task.

   Map the answers to the eligibility questions so you can:

   - Include them in the Group column on the Candidate List configurable grid.
   - Use them as facets in the My Candidates report.

Next Steps

Add the questionnaire to a job requisition or an evergreen requisition.

Related Information
Tasks
Steps: Maintain Custom Candidate List Grids on page 263

Change Questionnaires Assigned to Job Requisitions

Prerequisites

Configure the *Job Requisition* business process and security policy in the Pre-Hire Process functional area.

Context

Workday enables you to add or update questionnaires associated with an evergreen or job requisition using these tasks:

- Edit Job Requisition
- Edit Evergreen Requisition

When a candidate has applied to a job and there are regulatory restrictions that require you to change the associated questionnaire, Workday recommends that you:

- Create a new questionnaire.
- Update the existing questionnaire.

Steps

1. Access the Edit Tenant Setup - HCM task.
2. Select the Enable Primary or Secondary Questionnaire Removal or Replacement on Evergreen and Job Requisitions check box.
3. Access the Edit Job Requisition task and select the job requisition that you want to update.

4. Under the Job section of the requisition, select the Edit icon beside the Questionnaire section to remove or replace a questionnaire.

Next Steps

If you have candidates that applied to the old requisition, follow your regular policy for addressing those candidates.

Concept: Segmented Security for Recruiting Questionnaires

You can use multiple types of security to control access to questionnaire responses in each stage of the *Job Application* business process.

Segment-Based Security Groups

You can use the Create Security Group or Edit Security Group task to give users access to questionnaire responses. Use these types of security segments:

- Questionnaire security segments restrict access to 1 or more questionnaires. You can create as many as you need using the Create Questionnaire Security Segment task.
- Questionnaire response context security segments secure access to all Recruiting questionnaire answers within a specific stage of the *Job Application* business process. Workday delivers these segments:
    - *Candidate Data: Assessment Questionnaire*
    - *Candidate Data: Background Check Questionnaire*
    - *Candidate Data: Initial Questionnaire*
    - *Candidate Data: Interview Questionnaire*
    - *Candidate Data: Offer Questionnaire*
    - *Candidate Data: Ready for Hire Questionnaire*
    - *Candidate Data: Recruiting Agency Questionnaire*
    - *Candidate Data: Reference Check Questionnaire*
    - *Candidate Data: Review Questionnaire*
    - *Candidate Data: Screen Questionnaire*

You can't combine access to both types of segments for the same security group.

Security Domains

Workday delivers these domains:

- *Candidate Data: Questionnaire Total Score*: Secures the total score to a candidate's screening questionnaire on the Job Requisition composite view.
- *Candidate Data: Questionnaires*: Secures all questionnaire responses submitted by internal and external candidates.

Related Information
Reference
Workday 31 What's New Post: Segmented Security for Recruiting Questionnaire Responses

Example: Configure Segmented Security for Recruiting Questionnaires

This example illustrates how to configure access to questionnaire responses across different stages of the *Job Application* business process.

Context

You are the Security Administrator at Global Modern Services. Your recruiting process includes these questionnaires at these stages of the *Job Application* business process:

Stage	Questionnaire
Review	• Eligibility Questionnaire • Work Experience and Education
Interview	• Interview Feedback • Salary Expectations and Culture Fit
Background Check	• Criminal Convictions • Work References

For privacy and compliance purposes, you only want to share candidate answers to these questionnaires with the appropriate roles in your organizations. You also want to enable managers to see total scores for all screening questionnaires.

You can use a combination of questionnaire security segments, questionnaire response context security segments, and security domains to restrict questionnaire access to these roles:

- Recruiters have access to all questionnaires in the *Review* stage.
- Managers have access to all questionnaires except for the Criminal Convictions questionnaire in the *Background Check* stage.
- HR partners only have access to the Criminal Convictions questionnaire in the *Background Check* stage.

Prerequisites

Create the questionnaires and add them to the appropriate recruiting stages.

Steps

1. Configure Questionnaire Security Segments.

   Create these questionnaire security segments:

Option	Description
Work Experience and Education Questionnaire	Work Experience and Education
Criminal Convictions Questionnaire	Criminal Convictions

2. Create Segment-Based Security Groups.
    a) Create a new security group to give recruiters access to all questionnaires in the *Review* stage.

        Enter:

        - Type of Tenanted Security Group: Segment-Based Security Group.
        - Name: Access to Screening Questionnaires.
        - Security Groups: Recruiter.
        - Access to Segments: *Candidate Data: Review Questionnaire*.
    b) Create a new security group to give managers access to all questionnaires in the *Interview* stage.

        Enter:

        - Type of Tenanted Security Group: Segment-Based Security Group.
        - Name: Access to Interview Questionnaires.
        - Security Groups: Manager.
        - Access to Segments: *Candidate Data: Interview Questionnaire*.
    c) Create a new security group to give managers access to the Work Experience and Education questionnaire.

        Enter:

        - Type of Tenanted Security Group: Segment-Based Security Group.
        - Name: Access to Work Experience and Education Questionnaire.
        - Security Groups: Manager.
        - Access to Segments: *Work Experience and Education Questionnaire*.
    d) Create a new security group to give HR partners access to the Criminal Convictions questionnaire.

        Enter:

        - Type of Tenanted Security Group: Segment-Based Security Group.
        - Name: Access to Criminal Convictions Questionnaire.
        - Security Groups: HR Partner.
        - Access to Segments: *Criminal Convictions Questionnaire*.
3. From the related actions of the *Candidate Data: Questionnaire Total Score* domain, select Domain > Edit Security Policy Permissions.
    a) Add a new row on the Report/Task Permissions grid.
    b) In the Security Groups column, select the Manager group.
    c) Select the View check box.
4. From the related actions of the *Candidate Data: Questionnaires* domain, select Domain > Edit Security Policy Permissions.
    a) Add a new row on the Report/Task Permissions grid.
    b) In the Security Groups column, select the Access to Screening Questionnaires group.
    c) Select the View check box.
    d) Repeat the steps for these security groups:

        - Access to Criminal Convictions Questionnaire
        - Access to Interview Questionnaires
        - Access to Work Experience and Education Questionnaire
5. Activate Pending Security Policy Changes.

Result

The security groups and roles you configured now have access to the appropriate questionnaires.

Example: Reuse Questionnaire Across Multiple Job Application Stages

This example illustrates how to:

- Use 1 questionnaire across multiple stages of the *Job Application* business process.
- Restrict access to questionnaire responses based on job the application stage.

Context

You've configured a feedback questionnaire that you want to use in the *Review* and *Interview* stages of the *Job Application* business process. You want to give access to questionnaire responses to these groups, based on these job application stages:

Job Application Stage	Group
Review	Recruiter
Interview	Manager

To do this, you can use a combination of:

- Domain security policies.
- Questionnaire security segments.
- Questionnaire response context security segments.

Prerequisites

- Create the Feedback questionnaire.
- Add the questionnaire to the *Review* and *Interview* stages of the *Job Application* business process.

Steps

1. Configure Questionnaire Security Segments.

   Create a new questionnaire security segment and enter:

Option	Description
Name	Feedback Questionnaire
Questionnaire	Feedback

2. Create Segment-Based Security Groups.
    a) Create a new security group to give recruiters access to the Feedback questionnaire.

        Enter:

        - Type of Tenanted Security Group: Segment-Based Security Group.
        - Name: Recruiter Access to Feedback Questionnaires.
        - Security Groups: Recruiter.
        - Access to Segments: Feedback Questionnaire.
    b) Create a new security group to give managers access to the Feedback questionnaire.

        Enter:

        - Type of Tenanted Security Group: Segment-Based Security Group.
        - Name: Manager Access to Feedback Questionnaires.
        - Security Groups: Manager.
        - Access to Segments: Feedback Questionnaire.
    c) Create a new security group to give recruiters access to questionnaires in the *Review* stage.

        Enter:

        - Type of Tenanted Security Group: Segment-Based Security Group.
        - Name: Access to Review Questionnaires.
        - Security Groups: Recruiter Access to Feedback Questionnaires.
        - Access to Segments: *Candidate Data: Review Questionnaire*.
    d) Create a new security group to give managers access to questionnaires in the *Interview* stage.

        Enter:

        - Type of Tenanted Security Group: Segment-Based Security Group.
        - Name: Access to Interview Questionnaires.
        - Security Groups: Manager Access to Feedback Questionnaires.
        - Access to Segments: *Candidate Data: Interview Questionnaire*.
3. From the related actions of the *Candidate Data: Questionnaires* domain, select Domain > Edit Security Policy Permissions.
    a) Add a new row on the Report/Task Permissions grid.
    b) In the Security Groups column, select the Access to Review Questionnaires group.
    c) Select the View check box.
    d) Repeat these steps for the Access to Interview Questionnaires security group.
4. Activate Pending Security Policy Changes.

Result

Managers and recruiters now have access to the Feedback questionnaire responses for the appropriate stages.

Assessments

Steps: Set Up Assessments for Candidates

Prerequisites

Security:

- *Set Up: Recruiting* domain in the Recruiting and Talent Pipeline functional areas.
- *Staffing Actions: Job Requisition Assessments* domain in the Staffing functional area.

Context

You can request candidates to complete assessment tests when:

- You move candidates to the Assessment stage in the recruiting process.
- The candidate applies for a job using an external career site.

You can also complete the Assessment stage for a candidate using the *Assess Candidate* web service. To retrieve assessment information, use the *Get Assess Candidate* web service.

Steps

1. Set up assessment-related integrations with your vendors.

   See:

   - Concept: Workday Studio.
   - Steps: Set Up Inline Assessments Integration.
2. Edit Domain Security Policies.

   Configure the security policies for the *Candidate Data: Assessment Results* domain in the Recruiting functional area.
3. Edit Business Processes.

   Configure the *Assess Candidate* business process.

   As you complete this step, consider:

Business Process Step	Description
Assess Candidate	Enables recruiters to select the recruitment tests the candidate takes. If there are assessment tests configured on the evergreen or job requisitions, they automatically display.
Integration	Enables a third-party vendor to administer 1 or more assessment tests.
Take Candidate Assessment	Enables recruiters to send the Take Assessment task to: • An external candidate's Candidate Home account. • An internal candidate. • A nonworker. Workday recommends that you configure this step to run parallel with an *Integration* step.
Make Assessment Decision	Enables you to move the candidate to the next stage in the recruiting workflow or decline the candidate. Make this step the completion step.
4. (Optional) Access the Maintain Recruiting Assessment Categories task.

   Create categories for your assessment tests.
5. Access the Maintain Recruiting Assessment Tests task.

   Set up individual assessment tests to track and evaluate candidates at a more granular level. Inline assessments must have an integration system.
6. Access the Maintain Assessment Statuses task.

   Create assessment statuses for use on individual tests, overall ratings, or both.

7. (Optional) Access the Maintain Job Requisition Assessment Defaults task.

   If there aren't any assessments aligned to a job requisition, select the Automatically Include Blank Row on Assess Candidate Task check box to create an empty row on the Assess Candidate task grid.

   Create condition rules to use to populate assessment tests on job requisitions and the Assess Candidate task.
8. (Optional) Set up task consolidation for the *Assess Candidate* business process.

   See Steps: Set Up Task Consolidation.
9. Configure the *Job Application* business process to include *Assessment* as a stage.

   See Steps: Configure the Job Application Business Process on page 197.
10. Create evergreen and job requisitions.

    See:

    - Create and Edit Evergreen Requisitions on page 238.
    - Create and Edit Job Requisitions on page 611.
11. (Optional) Create External Career Sites on page 379.

    Enter instructions in the Apply Inline Assessment section. These instructions provide help to candidates taking an inline assessment test as a part of their job application.
12. (Optional) Configure segmented security for assessment test results.

    See Steps: Configure Segmented Security for Assessment Test Results on page 465.

Result

When a candidate applies to a job using an external career site and completes an assessment test, Workday records the results on the candidate profile. The status displays if you or the assessment vendor included it.

When a candidate moves to the *Assess Candidate* stage, Workday:

- Creates an *Assessment* event.
- Sets the status to *Assessment*.
- Sends a task to the assigned role's My Task for the configured step.

Related Information

Concepts

Concept: Inline Assessments Integration

Reference

2021R1 What's New Post: Consolidated Tasks for Assessments

Steps: Configure Segmented Security for Assessment Test Results

Prerequisites

Create:

- Integrations with third-party assessment test vendors.
- Assessment test categories.
- Assessment tests.

Context

You can configure segmented security to restrict access to assessment test results based on assessment test categories.

Steps

1. Access the Create Recruiting Assessment Category Security Segment task.

   Create a security segment for an assessment category.

   Security: *Set Up: Recruiting Assessment Category Security Segments* domain in the Recruiting functional area.
2. Create Segment-Based Security Groups.

   Create a security group that grants specific security groups access to specific security segments.
3. Edit Domain Security Policies.

   Update the security policy for the *Candidate Data: Assessment Results* domain.
4. Activate Pending Security Policy Changes.

Example: Configure Segmented Security for Assessment Test Results

This example demonstrates how to configure segmented security to determine who can access assessment test results.

Context

As a recruiting administrator, you want to configure security so:

- Only recruiting administrators can view the results from a Work Opportunity Tax Credit (WOTC) assessment.
- All recruiting-related roles can view the results of all other assessment tests.

Prerequisites

Set up assessment-related integrations with your vendors.

Steps

1. Create a WOTC assessment test category.
   a) Access the Maintain Recruiting Assessment Categories task.
   b) Enter these values:

Field	Value
Category Name	*WOTC Eligibility*
ID	*WOTC-1*

   c) Click OK, then click Done.
2. Add assessment tests.
   a) Access the Maintain Recruiting Assessment Tests task.
   b) Enter these values:

Field	Value
Test Name	*WOTC Survey*
Assessment Category	*WOTC Eligibility*

   c) Click OK, then click Done.

3. Create a security segment for an assessment category.
    a) Access the Create Recruiting Assessment Category Security Segment task.
    b) Enter these values:

Field	Value
Name	*WOTC Assessments Security Segment*
Assessment Category	*WOTC Eligibility*

    c) Click OK, then click Done.
4. Create a segment-based security group for restricted assessment tests.
    a) Access the Create Security Group task.
    b) Enter these values:

Field	Value
Type of Tenanted Security Group	*Segment-Based Security Group*
Name	*WOTC Assessments Security Segment*

    c) Click OK.
    d) Enter these values:

Field	Value
Security Groups	*Recruiting Administrator*
Access to Segments	*WOTC Assessments Security Segment*

    e) Click OK, then click Done.
5. Create a segment-based security group for nonrestricted assessment tests.
    a) Access the Create Security Group task.
    b) Enter these values:

Field	Value
Security Groups	*HR Administrator* *Manager* *Recruiter* *Recruiting Administrator*
Access to Segments	*Non-Segmented Recruiting Assessments*

    c) Click OK, then click Done.
6. Update the security policy for the *Candidate Data: Assessment Results* domain.
    a) Access the Domain Security Policies for Functional Area report.
    b) Select *Recruiting* in the Functional Area prompt.
    c) Click *Candidate Data: Job Application*, then click *Candidate Data: Assessment Results*.
    d) Click Override Parent Permissions.
    e) In the Report/Tasks Permissions section, delete all existing security groups.
    f) In the Report/Tasks Permissions section, add view access to these security groups:
        - *WOTC Assessments Security Segment*
        - *Non-Segmented Recruiting Assessments*
7. Activate Pending Security Policy Changes

Result

- Recruiting Administrators can see that test event and view the results.
- HR Administrators, Managers, and Recruiters can see that overall test event but can't view the results.

Interviews

Setup Considerations: Interviews

You can use this topic to help make decisions when planning your configuration and use of interview 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

Interviews in Workday help you schedule and track interview details during the recruiting process.

Business Benefits

Interview functionality enables you to:

- Schedule interviews and collect feedback within a unified system, streamlining the hiring workflow and enabling faster, more informed hiring decision-making.
- Integrate with Google Calendar or Microsoft Outlook (Office 365) to synchronize interview schedules, reduce conflicts, and improve coordination among interviewers.
- Use configurable rating scales to ensure consistent and objective interviewer feedback, supporting fair and data-driven hiring decisions.
- Automatically route feedback tasks to interviewers, increasing completion rates and maintaining momentum throughout the recruitment cycle.
- Display interview details, feedback, and interviewer information directly in the candidate profile, giving recruiters and hiring managers a clear, consolidated view.
- Enable candidates to view their scheduled interviews via Candidate Home, promoting transparency and improving communication throughout the process.
- Include targeted questions to evaluate candidates against specific competencies, helping identify the most qualified candidates for the role.

Use Cases

- Configure and manage video interviews for candidates in remote locations.
- Assemble executive-level interview panels for senior leadership roles, such as CEO requisitions.
- Provide hiring managers with a centralized candidate profile that includes interview schedules, feedback, and interviewer details to support informed decision-making.
- Guide interviewers with predefined, role-specific questions aligned to key competencies for consistent and focused evaluations.
- Streamline interview scheduling and coordination during peak hiring periods. Example: During university recruitment or job fairs.
- Use feedback data to identify trends, improve interview practices, and refine hiring strategies.

- Maintain records of interview activities and feedback to support audit readiness and policy adherence.
- Enable interviewers to provide competency-based feedback using standardized rating scales.
- Analyze feedback data to identify patterns, optimize interview techniques, and continuously improve the hiring process.
- Maintain detailed records of interview activities and feedback to ensure compliance with audit requirements and organizational policies.
- Standardize candidate evaluations by enabling interviewers to provide competency-based feedback using structured rating scales.

Questions to Consider

Questions	Considerations
How can you configure your interview process?	Workday enables you to configure your *Interview* business process in 1 of these 3 options: • Interviews solely in Workday. • Interviews with Google Calendar. • Interviews with Microsoft Outlook 365. You can configure a simplified interview experience with minimal steps for interviewers without a calendar integration. When you want interview schedulers to access scheduling data outside of Workday, you can use 1 of these integrations: • Google Calendar. • Microsoft Outlook 365.
How do you want recruiters and hiring managers to communicate with interviewers?	When you don't configure the calendar integration, you can create email templates to send communications to interviewers in Workday. When you configure a calendar integration, Workday sends calendar invitations, updates, and cancellations to interviewers.
How do you want to notify interview schedulers when interviewers accept or decline an interview?	You can configure calendar integration to send an email to the interview scheduler when interviewers respond to an invitation.
How do you want to notify candidates about upcoming interviews?	You can set up email, mobile push notification, and SMS reminders that automatically send to candidates before their interview. The reminders can use message templates or notification templates, if you use Notification Designer. Interview schedulers can configure the reminders as they complete the Manage Interview Scheduling Settings task.
What feedback do you want interviewers to provide?	You can elicit specific feedback by including competency ratings or custom questions specific to your organization. Interviewers can provide feedback directly in Workday, and you can enable interview

Questions	Considerations
	schedulers to send back feedback to interviewers for edits.

Recommendations

To ensure you can move the interview process forward when an interviewer can't complete an interview rating or make an interview decision, configure these business process steps concurrently:

- *Make Interview Decision*
- *Rate Interview*

Requirements

No impact.

Limitations

- You can view invitation responses when you use Outlook for Microsoft Office 365, but Workday doesn't store the response data. You can't report on responses or configure business process notification condition rules based on the data.
- Candidates can't schedule their own interviews in Workday.
- You can't use Outlook for Microsoft Office 365 with Workday when you have:
  - More than 1 instance of Outlook for Microsoft Office 365.
  - Any combination of hybrid, on-premise, or cloud data storage.
- You can't use the *Schedule Interview Team* step on the *Interview* business process with these integrations:
  - Google Calendar
  - Microsoft Outlook

Tenant Setup

No impact.

Security

Domains	Considerations
These domains in the Recruiting functional area: • *Candidate Data: Interview Feedback Comments* • *Candidate Data: Interview Feedback Results* • *Self-Service: Give Interview Feedback*	Users can: • Request interview feedback and view interview ratings. • View interview feedback comments entered by interviewers. • Give interview feedback.
Candidate Data: Interview Schedule in the Recruiting functional area	Users can view interview schedules.
Person Data: Work Email in the Contact Information functional area	Users can view work email addresses of the interviewers.
Set Up: Recruiting in these functional areas: • Recruiting • Talent Pipeline	Users can view information about recruiting setup, including: • Candidates. • Prospects.

Domains	Considerations
	• Job postings. • Recruiting statuses.

Business Processes

Configure the *Interview* business process with specific roles in mind.

Reporting

Reports	Considerations
Compare Candidate Interview Feedback	View interview feedback results for all candidates associated with an active job requisition.
Candidate Interview Schedule	View the interview schedule for a candidate.
Candidate Interview Feedback History	View all interview feedback submitted for a candidate, grouped by job requisition for completed interviews.
Interview Feedback Details	View all interview feedback submitted for each job application, including applicable competency and questionnaire feedback.
Interview Feedback Ratings Summary	View feedback ratings for all job applications associated with a job requisition.
My Interviews	Users can view all of their scheduled interviews.

Integration

Workday imports or exports this security information to or from Microsoft Office 365 when the interview scheduler:

- Creates and sends a calendar event.
- Views the available schedule of an interviewer.
- Selects a room.
- Accesses a calendar event in Workday using calendar view.
- Receives an interviewer's response to a calendar event.

Workday also uses the Microsoft Graph API to call these operations:

- Add Attachment
- Create Event
- Delete Attachment
- Delete Event
- Get Event
- Get Schedule
- List Places (Room Lists)
- List Places (Rooms)
- Update Event

Before you can schedule interviews, an IT administrator must accept the Microsoft Graph API permissions on behalf of all users in your tenant. The permissions grant access to:

- Calendars.
- Places, or conference room locations.

- Sign in to Workday and read profile data.

Connections and Touchpoints

Features	Considerations
Competencies	Configure competencies in the worker profile and Skills functional area to use them in the *Interview* business process.
External Career Sites task	You can display the interview schedule for the candidate on their Candidate Home page per your career site.

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
Reference

Workday 33 What's New Post: Interview Management

The Next Level: COVID-19 Webinar - Adapt to Changing Recruitment and Hiring Needs

Steps: Set Up Interviews

Prerequisites

- Security: *Set Up: Recruiting* domain in the Recruiting functional area.
- Create interview-scheduling location types when you're not integrating with a third-party calendar and you want to assign locations to interview sessions.
- Create competencies if you want to include them in an interview.
- Create questionnaires if you want to include them in an interview.

Context

You can add interviews as a component of your recruiting process. With interviews, you can:

- Define different types of interviews.
- Include 1 or more interview stages in the *Job Application* dynamic business process.
- Create an interview team and link it to a specific evergreen or job requisition.
- Create rating scales used by interviewers when providing feedback.
- Configure interviews to include competencies and questionnaires.
- Configure the candidate profile to display interview details and feedback.
- Configure the evergreen and job requisition profile to include interview-related information.
- Schedule and manage interviews.

Steps

1. Edit Domain Security Policies.

   Define the security groups that can access interview information for these interview-related domains in the Recruiting functional area:

   - *Candidate Data: Interview Feedback Comments*
   - *Candidate Data: Interview Feedback Results*
   - *Candidate Data: Interview Schedule*
   - *Person Data: Work Email*
   - *Self-Service: Give Interview Feedback*
   - *Self-Service: My Scheduled Recruiting Events*
2. Configure the Interview Business Process on page 482.
3. (Optional) Create Email Templates.

   If you don't integrate with Microsoft® Outlook and want to send an email to interviewers, access the Edit Tenant Setup - Notifications task. In the Notification Delivery Settings section, select a routing rule from the Rule prompt that enables *Email* as a Channel and *Immediately* as the Default Frequency for either the:

   - Recruiting parent notification type.
   - Interview Schedule Communications individual notification type.

   Create an interview scheduling template. Use the Candidate URL report field to include a link to the candidate profile in the message.
4. (Optional) Configure Candidate Reminders.

   See Steps: Set Up Interview Reminders on page 477.
5. Access the Maintain Interview Feedback Ratings task.

   Create a rating scale that interviewers use when providing feedback about the candidate. Once you create a rating scale, you can't change it. As you complete your rating scale, consider:

   - Enter at least 2 rows, but not more than 5.
   - For a 2-scale rating on the desktop or mobile application, enter a feedback description such as *Yes* or *No*.
   - For a 3 to 5-scale rating on the desktop application, enter the description exactly as you want it to display.
   - For a 3 to 5-scale rating on the mobile application, the scale displays as stars. Example: 3 = ***, 4= ****, and 5 = *****.
6. Access the Maintain Interview Types task.

   Create different types of interviews so you have flexibility when scheduling an interview. Example: Phone or In-Person.
7. (Optional) Add interview reports to profiles.

   Add:

   - *Interview Team* on the Details for Job Requisition Composite View profile group.
   - *Interview Feedback Details* and *Interview Schedule* on the Interview for Candidate Profile profile group.

   See Steps: Set Up Profiles and Profile Groups.
8. Access the Edit Tenant Setup - Recruiting task.

   Select Location Types for Interview Scheduling.

   Available to users not integrated with Microsoft® Outlook and when Enable Microsoft Outlook Interview Scheduling Integration isn't selected. Enables you to select organization-related locations when scheduling interviews using the Schedule Interview task. Locations only display in this prompt if tied to the location type specified here.

9. (Optional) Access the Edit External Career Sites task.

   To display the complete interview schedule on Candidate Home, select the Enable Interview Schedule on Candidate Home check box. Otherwise, the first-time slot for the interview displays. This setting doesn't apply to Candidate Self-Schedule events.
10. (Optional) Set up internal recruiting.

    See Steps: Set Up Internal Recruiting on page 371.
11. Hide or Require Optional Fields.

    To configure hidden or required fields on Interview Scheduling and Interview Feedback tasks, select Interview for the Recruiting functional area.
12. (Optional) Set Up Guided Tours.

    Add text to help users with the interview feedback task.
13. (Optional) Set up interviews to integrate with Microsoft® Outlook.

    See Steps: Set Up Interviews to Integrate with Microsoft Outlook on page 474.
14. (Optional) Set up interviews to integrate with Google Calendar.

    See Steps: Set Up Interviews to Integrate with Google Calendar on page 475.
15. (Optional) Add web conference links to interview schedules.

    See Steps: Set Up Integration to Web Conference Provider on page 476.

Related Information
Tasks
Create Locations
Steps: Set Up Competencies on page 122
Steps: Set Up Questionnaires for Recruiting on page 455

Steps: Set Up Interviews to Integrate with Microsoft Outlook

Prerequisites

- A Microsoft® work account through Azure Active Directory.
- Microsoft Exchange Online.
- Microsoft Outlook 365 email work addresses for interviewers.
- Microsoft Outlook 365 room lists.

Context

When you create an interview schedule, Workday integrates with Microsoft Outlook when:

- Viewing the availability of an interviewer.
- Viewing the availability of room lists and rooms.
- Creating a calendar event.
- Sending a notification to the interviewer.

Workday also integrates when:

- Rescheduling or canceling a calendar event.
- Checking the response of an interviewer to a calendar event.

Steps

1. Access the Edit Tenant Setup - Recruiting task.

   Click *Microsoft Outlook* for Enable Interview Scheduling Calendar Integration.

   Note: This takes up to 15 minutes to activate in Workday.

   See Reference: Edit Tenant Setup - Recruiting.

   Security: *Set Up: Tenant Setup - HCM* domain System functional area.
2. Configure the Interview Business Process on page 482.

   Don't add *Schedule Interview Team* as a step. It doesn't work with Microsoft Outlook.
3. (Optional) Access the Maintain Interview Rooms task.

   Sync the available rooms in Outlook with Workday to enable you to search for rooms when scheduling interviews. You'll want to run this task whenever you add new rooms to Outlook.

   Security: *Set Up: Recruiting* domain in the Recruiting and Talent Pipeline functional areas.

Next Steps

When performing these interview-related tasks, interviewers might see a Microsoft Permissions page when Microsoft validates their email address and password:

- Create an interview schedule.
- Cancel an interview schedule.
- Reschedule an interview.
- Manage interview feedback.

They must accept all permissions listed.

Related Information
Reference
Workday 33 What's New Post: Interview Management

Steps: Set Up Interviews to Integrate with Google Calendar

Prerequisites

- A Google account with G Suite Basic, G Suite Enterprise, or G Suite Business.
- Google Calendar email work addresses for interviewers.
- Google Calendar buildings.

Context

When you create an interview schedule, Workday integrates with Google Calendar when you:

- View the availability of an interviewer.
- View the availability of room lists and rooms.
- Create a Google Calendar event.
- Create a Google Calendar event with an attachment.
- Send a notification to the interviewer.

Workday also integrates when:

- Checking the response of an interviewer to a calendar event.
- Rescheduling or canceling a calendar event.
- Rescheduling or canceling a calendar event with an attachment

Steps

1. Access the Edit Tenant Setup - Recruiting task.

   Click *Google Calendar* for Enable Interview Scheduling Calendar Integration.

   Note: This takes up to 15 minutes to activate in Workday.

   See Reference: Edit Tenant Setup - Recruiting.

   Security: *Set Up: Tenant Setup - HCM* domain System functional area.
2. Configure the Interview Business Process on page 482.

   Confirm that the *Schedule Interview Team* isn't a step on the *Interview* business process.
3. (Optional) Access the Maintain Interview Rooms task.

   Sync the available rooms in Google Calendar with Workday to enable you to search for rooms when scheduling interviews. Run this task whenever you update rooms in Google Calendar.

   Security: *Set Up: Recruiting* domain in the Recruiting and Talent Pipeline functional areas.

Result

You can schedule interviews using Google Calendar.

Related Information
Reference
2020R1 What's New Post: Workday Google Calendar Interview Scheduling Integration

Steps: Set Up Integration to Web Conference Provider

Prerequisites

- Configure the *Interview* business process.
- Register your application client with your third-party web conference provider.
- Configure and deploy an integration system in Workday Studio using these web services:
  - *Get Web Conference Interview Data*
  - *Put Web Conference Interview Data*

Context

You can configure Workday to use a Workday Studio integration that adds a unique link to web conference meetings when you schedule interviews.

Steps

1. Access the Register External OAuth Client task.

   Register your application client with the integration system to enable access to your web conference within Workday.

   Enter these values provided by your web conference provider:

   - OAuth 2.0 Client Name
   - OAuth 2.0 Client ID
   - OAuth 2.0 Client Secret
   - (Optional) Authorize Endpoint URL
   - (Optional) Token Endpoint URL

   Security: *Security Administration* domain in the System functional area.

2. Create and configure access for an integration system user (ISU) account.

   Grant the ISU *Get* and *Put* access to the *Interview Integrations* domain.

   See Steps: Grant Integration or External Endpoint Access to Workday.
3. Access the Edit Tenant Setup - Recruiting task .

   Select your Studio integration system from the Web Conference Integration System prompt.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

Result

Interview schedulers who access the Schedule Interview task through their Inbox can:

- Sign in to their web conference account.
- Select the Include Web Conference Link check box before selecting an interview time.
- Click Confirm to run the integration after selecting an interview time.

Once confirmed, Workday adds the meeting link to:

- The location or web conference field in your meeting invitation if you have a calendar integration set up.
- The schedule interview email if you don’t have a calendar integration set up.
- The Interview profile group on the candidate's profile.
- The candidate's home page on your external career site.

Workday supports only one custom web conferencing provider at a time. Example: You can't have some recruiters using Zoom and others using Teams at the same time.

Related Information

Reference

Reference: Edit Tenant Setup - Recruiting

2021R1 What's New Post: Custom Web Conference Integration for Interview Management

Steps: Set Up Interview Reminders

Prerequisites

Set up interviews.

Context

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.

You can configure emails, mobile push notifications, and SMS messages to remind candidates about upcoming interviews.

Steps

1. (Optional) Set up Workday Messaging for the Candidate Reminders notification type to send interview reminders through SMS.

   See Steps: Set Up Workday Messaging in Production.
2. Create a message template for the *Candidate Reminders* notification type.

   See Steps: Set Up Message Templates.
3. (Optional) Create a notification template.

   If you use notification designer, you can create and activate a template for the *Candidate Reminders* notification type.

   See Create and Activate Notification Templates.

4. Access the Edit Tenant Setup - Notification task.

   Select the Enable Reminders check box on the Reminder Settings section. You can also configure notification routing rules for candidate reminders.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Result

Workday displays the Candidate Reminder Settings tab on the Manage Interview Scheduling Settings task. Interview schedulers can use the tab to configure:

- Custom Reminders.
- Reminders from message templates you've created.
- Reminders from notification templates you've created.

They can also use the View All Upcoming Candidate Interview Reminders report (secured to the *Candidate Data: Interview Schedule* domain) to view future reminders configured for job requisitions.

Related Information
Reference
2021R2 What's New Post: Interview Reminders

Steps: Manage Interviews

Prerequisites

Set up interviews. See Steps: Set Up Interviews.

Context

With interviews, you can:

- Create interview schedules.
- Create or update interview teams.
- Select locations or rooms.
- Reserve a room (for Microsoft® Outlook users),
- Evaluate and rate candidates.
- Move forward or decline candidates.
- Reschedule and cancel interviews.
- Send notifications and invitations to interviewers for those using and not using Microsoft® Outlook.
- View availability and responses (for Outlook users).
- View reports on schedules and interview details.

You can also add the Manage Interview Scheduling Settings task as a *To Do* step in these business processes:

- *Close Evergreen Requisition*
- *Close Job Requisition*
- *Evergreen Requisition* (Must be after the completion step)
- *Evergreen Requisition Change*
- *Freeze Job Requisition*
- *Job Requisition* (Must be after the completion step)
- *Job Requisition Change*
- *Move Job Requisition*

Steps

1. (Optional) Access the Innovation Services Opt-In task.
    a) In the HCM section, select the Recommended Interview Scheduling check box.
    b) Click OK and Done.

    Security: *Manage: Innovation Services* domain in the Innovation Services functional area.
2. Access the Manage Interview Scheduling Settings task.

    Select a Job Requisition to associate the interview with.
    a) Complete the Interview Team tab.

        Add a row to create an interview team by selecting the Interviewers, Duration of the interview, Interview Type, and Alternative Interviewers.
    b) Select the Recommended Interview Settings tab and enter the necessary details.

        This tab is only available when you opt in to the Recommended Interview Scheduling innovation service.
    c) Select the Candidate Reminder Settings tab to configure a custom reminder.

        Select the Enable Candidate Reminder check box.

        You can select a Notification Template and a Message Template.

        You can also Create Message and specify a Notification Send Date for when you want Workday to send the reminder to candidates.

        Workday will not translate messages if you select the Edit Message Content check box and edit a template.
    d) Click OK and Done.

    When you advance a candidate to the *Interview* stage, Workday:

    - Creates an *Interview* event.
    - Sets the status of the candidate to *Interview*.
    - Automatically assigns the Schedule Interview task to members of the interview team for the requisition.

    Note: This works only if you've configured the *Schedule Interview* step in the *Interview* business process.

    Security: *Job Requisitions for Recruiting* domain in the Recruiting functional area.
3. Access the Evergreen or Job Requisition.

    Review the candidates who have applied for openings.
4. Move a candidate to the interview stage.

    Workday sends the Schedule Interview or Schedule Interview Team task to My Tasks for the security group assigned to the step.
5. Access the Schedule Interview task from My Tasks to arrange the interview for the candidate.

    Complete the Schedule Interview:

Field	Description
Time Zone	Workday uses the Primary Location of the job requisition to determine the time zone, which applies to the entire interview schedule. Note: If you've opted in to the Workday 32 - Time Zones feature, then Workday uses the user's local time zone.

Field	Description
Interviewers	Automatically populates with the interviewers you selected on the Interview Team tab on the Manage Interview Scheduling Settings task.
Use Same Location or Room	Select this checkbox to use the same rooms throughout the entire interview schedule.
Location	This option displays only when you select the Use Same Location or Room check box.
Recommended Interview Settings	Expand the field for options that enable Workday to recommend schedules: • Range of Dates enables Workday to recommend interview dates up to 1 or 2 weeks after the selected date. You can also constrain the recommendation to the selected date. • Use Enable Order of Interviewers
Include Web Conference Link	Displays only when you set up a web conference integration. This check box adds a web conference link to the interview schedule. After selecting an interview time, you can click Confirm to run the integration and retrieve the link.

6. Configure the interview schedule.

   You have 2 options:

   - Use Recommend Times For Me, which enables Workday to suggest interview schedules based on your Recommended Interview Settings.
   - Schedule the interview manually.

Field	Description
Recommended Times For Me	Use to enable Workday to recommend schedules. When you select a recommendation, Workday populates the calendar with the schedule.
The calendar or schedule grid	To schedule the interview manually, click a time slot to enter the detailed information in the Schedule Interview edit window. Don't click Next until the entire schedule is complete. If you selected rooms on the previous page, they automatically populate the grid. If you selected the Use Same Location or Room check box, the rooms in the calendar grid change to reflect any updates you make in the Rooms prompt. If you didn't select Use Same Location or Room, Workday includes all available rooms in the Room prompt on the Schedule Interview

Field	Description
	edit window. The calendar doesn't reflect any changes you make to the rooms.
Available Rooms and Room Lists.	Displays for Microsoft Outlook® users.
Location	Displays for those not using Microsoft® Outlook.
Don’t send email	Displays for those not using Microsoft® Outlook.
Include Link to Candidate Profile	Displays for those using Microsoft® Outlook.
Include Interview Schedule	Displays for those using Microsoft® Outlook.
Submit	Click when the entire schedule is complete.

7. Review interview schedules.

   View the interview schedule of a candidate or your scheduled interviews for a range of dates:

   - Candidate Interview Schedule
   - My Interviews
8. Review the progress of the interviews and the interviewer feedback.

   Give Interview Feedback: the task interviewers use to provide interview feedback.

   If you've configured calendar integration, interviewers receive an interview invitation. Otherwise, you can create email templates to send to interviewers.

   Manage Interview Feedback: The task delivered by the *Manage Interview Feedback* action step. Configuration is on the *Interview* business process. Workday sends the Manage Interview Feedback task to My Tasks for the security group assigned to the step. You can:

   - Move the interview process to the next step.
   - Reschedule an interview.
   - Send the feedback back to an interviewer for rework.
   - View the interview schedule.
9. Review interview information.

   Use:

   - Candidate Profile to review interview schedule and feedback information.
   - (Optional) Generate interview feedback summary for a job applicant. See 2025R2 Feature Release Note: AI-Generated Interview Feedback Summary for additional details.
   - Interview Feedback Details to view all interview feedback comments, including comments for competencies and questionnaires.

     Security: *Candidate Data: Interview Feedback Results* domain.
   - Interview Feedback Ratings Summary to view a list of all job applications for a job requisition and all interview feedback.

     Security: *Candidate Data: Interview Feedback Results* domain.
   - A custom report that includes report fields from *Interview Feedback* business object.
10. Move forward or decline the candidate.

Related Information

Reference

2020R2 What’s New Post: Recommended Interview Scheduling

2021R2 What's New Post: Interview Reminders

2025R2 Feature Release Note: AI-Generated Interview Feedback Summary

Configure the Interview Business Process

Context

When a candidate reaches the Interview stage in Workday, you can configure a workflow that enables you to:

- Schedule multiple interviews with 1 or more interviewers.
- Collect candidate feedback from interviewers.
- Forward candidate feedback to a decision-maker, who can then move forward or decline the candidate.

You configure this workflow by adding steps to the *Interview* business process. You can also specify what information you want to require when scheduling an interview or collecting feedback from interviewers.

Workday enables you to use these combinations of Action steps:

- *Schedule Interview* > *Manage Interview Feedback* > *Make Interview Decision* (recommended)
- *Schedule Interview* > *Rate Interview* > *Make Interview Decision*
- *Schedule Interview Team* > *Rate Interview* > *Make Interview Decision*

Steps

1. Access the *Interview* business process.
2. From the related actions menu of the *Interview* business process, select Business Process Policy > Edit.

   Select the security groups that can perform specific actions and business process steps.
3. From the related actions menu of the *Interview* business process, select Business Process > Edit Definition.

   As you complete this step, consider:

Business Process Step	Description
Schedule Interview Team	This step doesn't work with Microsoft® Outlook or Google Calendar. Schedule interviews for a specific job application. You can schedule multiple interviews with 1 or more interviewers. Workday doesn't populate interview teams created using the Manage Interview Scheduling Settings task for this step.
Schedule Interview	Schedule interviews for a specific job application. Workday automatically populates the interview team from the Manage Interview Scheduling Settings task. Interviewers who use Outlook or Google Calendar receive a meeting invitation. For other interviewers, you can configure a custom notification on this business process step.
Rate Interview	Workday sends the Rate Interview task to the interviewers' My Tasks. Note: Workday no longer recommends using this step in your interview process. *Manage*

Business Process Step	Description
	Interview Feedback, as an alternative, provides more features and greater flexibility.

Manage Interview Feedback	*Manage Interview Feedback* is a *Shared Participation* type step. Workday initiates 2 tasks in My Tasks:
	• Manage Interview Feedback: Track the progress of the interview, including:
	  ◦ Feedback.
	  ◦ Returning feedback to interviewer.
	  ◦ Rescheduling.
	  ◦ Initiating the next action step.
	• Give Interview Feedback: Interviewers add ratings and comments, providing feedback about the candidate. Workday sends the Give Interview Feedback task to My Tasks for the security group defined on the security policy for the *Self-Service: Give Interview Feedback* domain. Example: Contingent Worker As Self or Employee As Self.
	Once you add this step and click Configure Shared Participation Step, you can:
	• Add a step delay in the Participant Detail Step Delay section. This delay controls when recipients receive their allocated tasks in My Tasks.
	• Use the Maintain Custom Validations task to configure custom validation rules.
	If you configure questionnaires on the Interview business process, the results don't display on the Questionnaire Results tab of the candidate profile.

Make Interview Decision	Move the candidate to the next stage in the recruiting workflow or decline their job application. We recommend that you make *Make Interview Decision* the completion step.

Related Information

Reference

2020R1 What's New Post: Workday Google Calendar Interview Scheduling Integration

Offers

Setup Considerations: Offers

You can use this topic to help make decisions when planning your configuration and use of Offers 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 configure Workday Offers to manage all stages of sending an offer of employment to a selected candidate.

Business Benefits

- Improves efficiency by combining all compensation components into a single task. Example: Salary, bonuses, and stock grants.
- Provides greater flexibility by enabling regeneration of offer letters to update details for candidates who have already moved into the staffing process. Example: Hire date or job title.
- Simplifies task management with workbooks that consolidate multiple offer-related tasks in My Tasks, helping teams manage high volumes more efficiently.
- Increases job requisition flexibility by allowing you to add extra job profiles during the offer stage to customize offers based on role requirements.
- Ensures legal and compliance support by integrating employment agreements directly into the offer process to meet regulatory standards.
- Strengthens auditability by tracking every offer change with a clear history of who made the change and when. This creates a reliable audit trail for internal reviews and regulatory reporting.

Use Cases

- Initiate multiple offer components in 1 task.

  Example: Add a candidate's base salary, signing bonus, and stock option grant to the same offer task.
- Automate offer initiation.

  When a job application moves to the *Offer* stage, Workday automatically generates and sends the offer letter.
- Consolidate multiple My Tasks offer and review tasks into 1 workbook.

  A recruiter combines several offer initiation and review tasks and submits them together.
- Track candidate progress with Offer statuses.

  Example: Use statuses like *Verbal Offer Accepted*, *Offer Sent to Candidate*, and *Offer Accepted*.
- Enable candidates to decline offers online.

  A candidate clicks a Decline Offer button on the external career site.
- Design, create, and preview templates for offer letters with Workday Docs.

  Design a template with placeholders for name, salary, and start date, and preview it before sending.
- Generate and regenerate offer letters easily.

  Update the Hire Date or the Start Date and resend the offer. Workday keeps a record of all changes.
- Renegotiate offers efficiently.

  Example: Update compensation terms, location or job title and resend the offer. Workday retains a record of all changes.
- Attach extra documents.

  Attach a benefits summary or a copy of the employee handbook.

- Send Offer and Employment Agreement in the same job application flow.

  After the candidate accepts the offer, the employment agreement is automatically sent for review and signature.
- Include *Notice Period* and *Probation Period* details in offer documents.

  Example: The offer letter states the probation period is 3 months and the notice period is 1 month.
- Enable candidate interaction.

  Candidates can accept or decline offers, upload documents, and complete forms through the external career site.

Questions to Consider

Questions	Considerations
Do you want to send candidates an offer followed by employment agreement in the same job application flow?	You can configure the *Employment Agreement* step on the *Offer* business process.
Do you need to generate and have candidates sign both an offer letter and an employment agreement document?	If yes, then you need to use both *Offer* and *Employment Agreement* business processes sequentially.
Do you need to include these details on the employment agreement document? • Notice Period • Probation Period • Collective Agreement • Contract Details	You must add the same details on the *Offer* business process. The configurations of the *Offer* and *Employment Agreement* business processes need to mirror each other in order for data to flow down from *Offer* to *Employment Agreement* and onwards to *Staffing Events*. You can edit these details on *Employment Agreement* if desired.
How do you want to manage multiple offer tasks?	You can configure Workbooks to consolidate these steps into 1 task in My Tasks: • Offer Initiation • Review Offer
Who do you want to change information during the offer process?	Security domains enable you to control who can update information when initiating an offer.
How do you want to manage negotiations with candidates?	You can enable candidates to decline an offer directly from the Candidate Home. When you renegotiate an offer, the new offer uses the details from the original offer, even if you update the job requisition.
How do you want to update offer document details after a candidate accepts?	You can configure the regeneration of offer letters after you move a candidate into a staffing process. Example: When you update the hire date after you've moved the candidate to the *Hire* stage, you can regenerate a new offer document to send to the candidate.
Do you want to send other documents to candidates together with the offer letter?	You can configure the *Add Documents* step to the Offer business process. This action step

Questions	Considerations
	enables you to attach documents. Example: Health Insurance Package.
How do you want to populate offer information during high volume hiring? Example: Internships	You can configure condition rules and data fields on the Maintain Staffing Field Defaults task to populate these fields on an Offer during recruiting: • Hire Date • Contract End Date
Do you wish to include Compensation in the generated offer document?	Add Compensation to the *Offer* and *Employment Agreement* business processes. Compensation values added on the *Offer* step don't flow down to the *Employment Agreement* step.
Do you want to: • Renegotiate *Employment Agreement* • Run any other business process between *Offer* and *Employment Agreement.* Example: Background Check.	Remove this Entry Condition; *Allow Employment Agreement step if there is no prior Offer event*, from every stage of the *Job Application* business process where *Employment Agreement* is configured as a Next Possible Step.
Do you want to include these details on the offer document? • Compensation • One Time Payment • Stock Grants	Ensure to add the same details on to *Employment Agreement* so that they can flow down to: • *Staffing Events* • *Hire* • *Change Job.*
Do you wish to make corrections to an Offer?	If you make a Correct to Offer, the corrected *Offer* data will flow down to *Employment Agreement*. • Any subprocesses of *Employment Agreement* that haven't started will get corrected data from *Offer*. • Any subprocesses of the *Employment Agreement* that have started won't get corrected data from *Offer*. • Corrections made to *Employment Agreement* will update only the values on the *Employment Agreement*.
Do you want to report on Compensation in the context of an *Employment Agreement* or have Compensation in the generated employment agreement document?	Configure Compensation on the *Employment Agreement* business process.

Recommendations

Workday recommends that you don't configure *Offer* and *Employment Agreement* as parallel stages to each other. Initiating *Employment Agreement* first with *Offer* as a parallel stage will cause *Offer* not to initiate.

On the *Generate Document* step on the *Offer* business process, Workday bases the document language on the user's locale and language. We recommend you hide the Document Language field for offers.

Configure the *Make Offer Decision* step as the completion step on your *Offer* business process.

To propose establishments that will appear in offer letters, Workday recommends that you select the Allow Establishment on Employment Agreement/Offer check box on the Configure Establishment by Country task.

Use *Employment Agreement* instead of *Offer*, if you need to include these details but don't want to send an offer followed by an employment Agreement:

- Collective Agreement
- Probation Period
- Contract Details
- Notice Period

Workday recommends that you renegotiate *Offer* before you initiate *Employment Agreement*.

You can't go back to *Offer* or renegotiate *Offer* after you initiate the *Employment Agreement* step.

Requirements

Set up job requisitions to track job requirements and move candidates through the recruiting process.

Limitations

When consolidating tasks in a workbook:

- You can include a maximum of 200 offers.
- You can't consolidate delegated tasks.

If you remove mutual exclusivity between *Offer* and *Employment Agreement*, you can’t use the Maintain Staffing Field Defaults task to populate these details on *Employment Agreement:*

- Hire Date
- Contract End Date

On the *Approval* step of the *Offer* business process, when an approver sends back an item with a comment, Workday doesn't display that comment to the user who receives the item.

Tenant Setup

No impact.

Security

Domains	Considerations
Candidate Data: Offer Details in the Recruiting functional area.	Users can access a candidate's offer details and related documents. Only users with access to this domain can view the Compensation tab on the candidate's profile.
Candidate Data: Offer Initiation *Candidate Data: Offer Initiation Business Title* *Candidate Data: Offer Initiation Weekly Hours* in the Recruiting functional area.	Users can access these fields when initiating an offer: • Start Date • Location • Document Language • Business Title • Weekly Hours

Domains	Considerations
Candidate Data: One-Time Payment Offer in the Recruiting functional area.	Users can access a candidate's one-time payment details during the offer process. Example: Signing bonus.
Candidate Data: Stock Grant Offer in the Recruiting functional area.	Users can access a candidate's stock grant details during the offer process.
Candidate Data: Attachments in the Recruiting functional area.	Users can view documents on the Candidate Attachments tab on the candidate profile. Example: Stock plan policy.
Docs *Drive* in the System functional area.	Users can access Workday Docs to create templates for offer letters.
Manage: Candidates in the Recruiting functional area.	Users can update candidate statuses.

Business Processes

Business Processes	Considerations
Offer	Configure steps for: • Compensation. • Document generation and review. • Renegotiation of offers.
Job Application	Configure the *Offer* business process on the *Job Application* business process to enable renegotiation of offers.
Propose Compensation Offer/Employment Agreement *Request One-Time Payment Offer/Employment Agreement* *Request Stock Grant Offer/Employment Agreement*	Configure these business processes as part of the *Offer* business process. These business processes enable you to request and get approval for compensation plans, such as stock grants, and add them to compensation packages.
Regenerate Offer Documents	You can configure this business process to enable regeneration of offer documents.

Reporting

You can use the View Document Template Details report to view offer letter templates created with Workday Docs.

Integrations

You can use the *Offer* web service to initiate offers in bulk.

Connections and Touchpoints

Offers functionality interacts with these areas of Workday:

Features	Considerations
Career Sites	You can configure your career sites to enable candidates to respond to offers from Candidate Home.
Compensation	You can include and group compensation components together in your candidate offers.
Job Requisitions	Your offers use details from the job requisition that you initiate them from. When renegotiating an offer, the details come from the latest completed offer.
Workday Docs	You can configure Workday Docs to create templates for offer letters.

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 Task Consolidation for Offers on page 493

Reference

2023R1 What's New Post: Offers and Employment Agreements Field Defaulting

Steps: Set Up Offers

Context

When you configure offers in Workday, you can:

- Group compensation components, such as base pay, stock grants, and one-time payments, as 1 task.
- Use security domains to control who can add and update specific information when initiating an offer.
- Create offer statuses to track candidates at different stages of the offer process.

If you enable the Additional Job Profiles field on job requisitions, you can also change the job profile associated with a requisition during the *Offer* stage for requisitions that have more than 1 profile.

If you select the Allow Establishment on Employment Agreement/Offer check box on the Configure Establishment by Country task, you can display the Establishment prompt on the Details section of *Offer* events.

If you propose an establishment in offer, the proposed establishment populates in the applicable staffing events.

Steps

1. Edit Domain Security Policies.

   Configure the security policies for these domains in the Recruiting functional area:

   - *Candidate Data: Offer Details*
   - *Candidate Data: Offer Initiation*
   - *Candidate Data: Offer Initiation Business Title*
   - *Candidate Data: Offer Initiation Weekly Hours*
   - *Candidate Data: One-Time Payment Offer*
   - *Candidate Data: Stock Grant Offer*
   - *Manage: Candidates*
2. Edit Business Process Security Policies.

   Configure these business processes and their security policies in the Core Compensation functional area:

   - *Propose Compensation Offer/Employment Agreement*
   - *Request One-Time Payment Offer/Employment Agreement*
   - *Request Stock Grant Offer/Employment Agreement*
3. Steps: Configure the Offer Business Process on page 491.
4. Create Segment-Based Security Groups.

   Configure the segment-based security groups that have access to the *Candidate Data: Offer Questionnaires* security segment.
5. Access the Maintain Offer and Employment Agreement Statuses task.

   These statuses display on the candidate profile, along with the candidate's current stage. Example: Offer - Verbal Offer Accepted.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
6. Hide or Require Optional Fields.
   a) Configure the optional fields that display on candidate offers. Select 1 of these functional areas:

      - Recruiting > Offer
      - Recruiting > Offer Details Composite View

      If you configured the Generate Document step, we recommend that you hide the *Document Language* field in the Offer functional area. The Generate Document step sets the document language based on the locale and language settings of the user. Hiding the *Document Language* field simplifies the user experience.
   b) (Optional) Enable additional job profiles on job requisitions.

      Select the Pre-Hire Process > Job Requisition functional area.
7. Set up compensation components for the *Offer* business process and its subprocesses.

   See Steps: Set Up Compensation Components.
8. (Optional) Create One-Time Payment Plans.

   Set up one-time payment plans, such as referral bonuses or new hire grants.
9. (Optional) Configure stock plans for new hires.

   See Steps: Manage Stock Plans and Grants.
10. (Optional) Maintain Localization Settings on page 144.

    Configure these localized fields to display on *Offer* business process:

    - *Paid FTE (Worker)*
    - *Working FTE (Worker)*

Result

When a candidate moves to the *Offer* stage, Workday:

- Creates an *Offer* event.
- Sets the candidate's status to Offer.
- Creates a pre-hire record for the candidate.
- Sends tasks to My Tasks for the roles that need to take action on the next business process step you configured.

Next Steps

- Add *Offer* as a Possible Next Step on 1 or more stages of the *Job Application* business process.
- Set up task consolidation to enable users to work on multiple tasks at once from a workbook.
- Regenerate an accepted offer document.

Related Information
Tasks
Steps: Set Up Salary Plans on page 1068
Reference
The Next Level: Negotiations - Enabling Candidates to Decline Offers
The Next Level: Document Generator for Offer Letters in Recruiting
The Next Level: COVID-19 Webinar- Adapt to Changing Recruitment and Hiring Needs
Workday 2023R2 What's New Post: Establishment on Employment Agreement, Offer, and Staffing
Examples
Example: Correct and Regenerate an Offer Document on page 495

Steps: Configure the Offer Business Process

Prerequisites

- Configure the *Offer* business process security policy.
- Security: *Security Configuration* domain in the System functional area.

Context

You can configure the *Offer* business process to:

- Set a compensation basis.
- Request and get approval for stock grants or one-time payment plans, and add them to compensation packages.
- Get candidate endorsements from workers.
- Generate, send, and receive electronically signed documents.
- Renegotiate offers.
- Enable candidates to update their government IDs and personal information.
- Enable you to attach extra documents that you can send to candidates together with other generated documents.

You can also configure Workday to unpost jobs automatically once you've made an offer to a candidate.

Steps

1. Edit the *Offer* business process definition.

   Add 1 or more of these business processes as steps:

   - *Propose Compensation Offer/Employment Agreement.*
   - *Request One-Time Payment Offer/Employment Agreement.*
   - *Request Stock Grant Offer/Employment Agreement.*

   Configure the *Make Offer Decision* step as the completion step.

   See Steps: Configure Business Process Definitions.
2. (Optional) Access the View Business Process Template report.

   From the related actions menu of the Offer business process type, select Business Process-->Configure Consolidated Template to combine these compensation components into a single task:

   - *Propose Compensation Offer/Employment Agreement*
   - *Request One-Time Payment Offer/Employment Agreement*
   - *Request Stock Grant Offer/Employment Agreement*

   Security: These domains in the System functional area:

   - Business Process Administration
   - Manage: Business Process Definitions
3. (Optional) Add a *Review Offer* step.

   The Order of this step must be *b*.

   If you include this step in the *Offer* business process, Workday recommends that you omit the review step on these individual business processes:

   - *Propose Compensation Offer/Employment Agreement*
   - *Request One-Time Payment Offer/Employment Agreement*
   - *Request Stock Grant Offer/Employment Agreement*
4. (Optional) Configure Generated Documents.

   Add a *Generate Document* step to create an offer letter. You can create templates for offer letters using the Create Document task or Workday Docs. When you configure this step, you must select a Default Document from the Workday-delivered Offer category.

   To view offer documents, users must be:

   - Assigned to the *Review Documents* step.
   - Assigned as the Run as User on the *Review Document* step. You can only select users who are assigned to a user-based security group.
   - Secured to the *Candidate Offer Details* domain and belong to a document category security segment with access to the Workday-delivered Offer Letter and Offers document categories.
5. (Optional) Add the *Add Documents* step to enable you to attach extra documents that you can send to selected candidates. Example: Code of Conduct.

   Define a security group for the *Add Documents* step. Example: Recruiter.

   - Edit your *Configure Document Review* on the *Review Documents* step to include the documents from the *Add Documents* step.
6. (Optional) Add a *Review Documents* step to request candidates to view and electronically sign the offer letter.

   To ensure that candidates receive their offer letters, Workday recommends that you enable candidate email verification on the Edit Tenant Setup - Recruiting task.

7. (Optional) Select Business Process Policy > Edit from the related actions menu of the *Offer* business process.

   Enable document attachments for *Initiation* and *Action* steps when sending offer for approval internally. In the Attachment Setting in BP Toolbar section:

   a. Select Enable Attachments.
   b. Select which security groups have permission to view and edit attachments.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Next Steps

To regenerate an accepted offer document, configure the *Regenerate Offer Documents* business process and access the Regenerate Offer Documents task.

Related Information

Concepts

Concept: Automatically Unpost Jobs on page 419

Concept: Workday Docs

Tasks

Steps: Maintain Access to Documents

Reference

Workday Community: Offer Document Generation Configuration Tips

The Next Level: Document Generator for Offer Letters in Recruiting

2021R1 What's New Post: Offer Attachments

Examples

Example: Correct and Regenerate an Offer Document on page 495

Steps: Set Up Task Consolidation for Offers

Prerequisites

Set up offers.

Context

You can consolidate multiple tasks for these stages into a workbook to process them at one time:

- Offer
- Offer Review

You need to consolidate tasks for each stage separately.

Steps

1. Set up task consolidation for the *Offer* business process.

   See Steps: Set Up Task Consolidation.
2. (Optional) Set up task consolidation for Compensation subprocesses.

   See Set Up Task Consolidation for Compensation in Recruiting on page 1052.
3. Grant Modify access to security groups in these domains in the Recruiting functional area:

   Candidate Data: Offer Initiation

   Candidate Data: Offer Initiation Business Title

   Candidate Data: Offer Initiation Weekly Hours
4. Activate Pending Security Policy Changes

Next Steps

Access the Consolidate Tasks report to consolidate available tasks.

Related Information

Reference

2020R1 What's New Post: Task Consolidation for Review Offer

Example: Add Documents to Job Offer

This example illustrates how to configure the *Offer* business process so that you can attach documents to employment offers that display on the Candidate Home page.

Context

You want to include documents about your organization's health insurance package and stock options for workers along with the job offer to a successful candidate.

You need to add these steps on the *Offer* business process to enable you add and review the documents before sending them for managerial approval and on to the candidate:

1. Add Documents
2. Review Documents

Prerequisites

Security:

- *Candidate Data: Attachments* domain in the Recruiting functional area.
- *Candidate Data: Offer Details* domain in the Recruiting functional area.
- *Pre-Hire Data: Employment Agreement* in the Recruiting and Pre Hire Process functional areas.

Steps

1. Access the Edit Tenant Setup - Business Processes task.
2. Select the Enable Attachments check box.
3. Click OK and Done.
4. From the related actions menu of the *Offer* business process, select Business Process > Edit Definition.
5. Select current date from the Effective Date prompt.
6. Click OK.
7. On the Edit Business Process Definition section, add 3 rows to the Business Process Steps grid and enter these values:

Order	Type	Specify	Group
b	*Action*	*Add Documents*	*HR Administrator*
c	*Action*	*Generate Document*	*HR Administrator*
d	*Review Documents*		*HR Administrator*

8. On the Make Offer Decision step, set the step order to z.
9. Click OK.
10. Click Configure Generate Document Step.
11. Click OK.

12. On the Configure Generate Document Step task, enter these values:

Option	Value
Default Document	Select *Active Documents* then *Offer Letter Doc Gen*
Run As User	HR Administrator/Recruiter

13. Click OK and Done.
14. Click Configure Document Review.
15. Click OK.
16. On the Configure Review Document task, select *Today* from the Document Effective As Of prompt.
17. In the Documents section, select *Generate Document Step* then *c - Generate Document* from the Document prompt.
18. Click Add.
19. From the Document prompt, select *Add Document Step* then *b - Add Documents*.
20. Click OK and Done.

Next Steps

Move the selected candidate to the *Offer* stage and attach the health insurance package and stock options document for your organization.

Documents added to the *Offer* business process as attachments will display to candidates on Candidate Home in the order they become available to review. Documents that Workday generates using customizable templates are generated after standard documents. This ordering is dependent on how long the document takes to generate. Example: The health insurance package added using the *Add Documents* step may appear above the offer letter.

Related Information

Concepts

Concept: Add Documents Step

Reference

2023R1 What's New Post: Add Documents to Offers and Employment Agreements

Example: Correct and Regenerate an Offer Document

This example describes how to correct and regenerate an accepted offer document.

Context

You send an offer document that includes a hire date of August 27, 2030 to a successful candidate. The candidate signs and returns the offer document and you move the candidate to the *Hire* stage. The candidate later contacts you to request a hire date of September 27, 2030. You need to correct the date and regenerate another offer document for the candidate to review and sign.

Prerequisites

- Configure the *Regenerate Offer Documents* business process and security policy in the Recruiting functional area.
- Add the *Generate Document* followed by the *Review Document* steps to the *Regenerate Offer Documents* business process definition.
- Security: *Security Configuration* domain in the System functional area.

Steps

1. Access the candidate profile.
2. Select Business Process > Business Process Event History from the related actions menu.
3. In the Job Application field, select the job application for the candidate if they have more than 1 job application.
4. Click OK.
5. On the Process tab, select Business Process > Correct from the related actions menu on the *Offer* business process.
6. Change the Hire Date to 09-27-2030.
7. Enter a Comment to explain the update to the offer document.
8. Click Submit.
9. Select Business Process > Regenerate Offer Documents from the related actions menu on the *Offer* event.
10. Click OK.
11. Click Open to review the regenerated offer document.
12. Click Submit.

Result

Candidates can access the regenerated offer document on Candidate Home. If the offer is to a worker, the offer document goes to the worker's My Tasks.

Workday sends a notification to the candidate requesting them to review and sign the regenerated offer document.

Workday displays the regenerated offer document on the Attachments tab of the candidate profile.

Example: Set Up Offer and Employment Agreement for Same Job Application

This example illustrates how to configure the job application business process to enable you to send candidates an Offer letter followed by an Employment Agreement.

Context

As HR Administrator, you want to send an offer letter to a candidate informing them that you wish to hire them. After the candidate accepts the job offer, you want to send them a contractual Employment Agreement with these details:

- *Collective Agreement*
- *Contract Details*
- *Probation Period*
- *Notice Period*

You also want the candidate to sign both the offer letter and the employment agreement document. Both documents will be accessible on the candidate profile within Workday.

Steps

1. Access the *Job Application* business process.
2. Click View Dynamic Definition.
3. Select the Employment Agreement tab.
4. From the related actions menu of the Step on the Possible Next Steps section, select Business Process > Maintain Step Conditions .

5. On the Entry Conditionstab, remove the ***Rule*** *Allow Employment Agreement step if there's no prior Offer event.*

   Note: Workday recommends that you remove this tenanted rule *Allow Employment Agreement step if there's no prior Offer event.* from every stage where the *Employment Agreement* step is configured as a possible next step.)
6. Click OK and Done.
7. On the View Dynamic Business Process Definition page of the Job Application business process, click Edit Dynamic Definition.
8. Select the Offer tab.
9. Add a row on the Next Possible Steps grid and enter these values:

Specify	Group
Employment Agreement	*HR Administrator*

10. Click OK and Done.
11. Access the Offer business process.
12. From the related actions menu of the *Offer* business process, select Business Process > Edit Definition.
13. On the Edit Business Process Definition section, add 4 rows to the Business Process Steps grid and enter these values:

Order	Type	Specify	Group
b	*Action*	*Initiate - Pre Hire-Probation Period Details*	*HR Administrator*
c	*Action*	*Initiate - Pre Hire-Contract Details*	*HR Administrator*
d	*Action*	*Initiate - Pre Hire-Collective Agreement Details*	*HR Administrator*
e	*Action*	*Initiate - Pre Hire-Notice Period Details*	*HR Administrator*

14. Click OK and Done.
15. Access the Employment Agreement business process definition.
16. From the related actions menu of the *Employment Agreement* business process, select Business Process > Edit Definition.
17. On the Edit Business Process Definition section, add 5 rows to the Business Process Steps grid and enter these values:

Order	Type	Specify	Group
b	*Action*	*Initiate - Pre Hire-Probation Period Details*	*HR Administrator*
c	*Action*	*Initiate - Pre Hire-Contract Details*	*HR Administrator*
d	*Action*	*Initiate - Pre Hire-Collective Agreement Details*	*HR Administrator*

Order	Type	Specify	Group
e	*Action*	*Initiate - Pre Hire-Notice Period Details*	*HR Administrator*

18. Click OK and Done.

Result

If you move candidates from *Offer* to *Employment Agreement*, the values added during the offer stage will move down to employment agreement and onwards to *Staffing Events*. You can edit these details in *Employment Agreement* if desired.

Corrections made to *Employment Agreement* will update only the values on the *Employment Agreement* document.

Compensation plans added on *Offer* don't flow down to the *Employment Agreement* step.

Next Steps

After you initiate the *Employment Agreement* step, you can't revert to the *Offer* stage. You also can't renegotiate *Offer*.

Workday recommends that you renegotiate *Offer* before you initiate *Employment Agreement*.

Related Information
Reference
2023R1 What's New Post: Offer and Employment Agreement Alignment

Onboarding Experience

Setup Considerations: Onboarding Experience

You can use this topic to help make decisions when planning your configuration and use of the onboarding 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

Workday Onboarding Experience enables you to offer a personalized and engaging experience to new hires at defined stages of their transition from candidates to workers. The onboarding experience ensures new team members feel informed, connected, and prepared to succeed in their roles. You can use the onboarding experience for:

- New Hires
- Pre-Hires
- New Contingent Workers

Business Benefits

- Drives business success by ensuring new hires feel informed, prepared, and supported from the start.

- Builds a positive workplace culture and boosts confidence from day one.
- Reduces first-day no-shows, improves staff retention and lowers turnover costs.
- Improves productivity by helping new hires adapt to their tasks quickly.
- Strengthens employee engagement by fostering a sense of connection to the company culture.
- Enhances managers and HR efficiency by centralizing administrative tasks related to the creation and maintenance of onboarding.
- Supports the 4 core pillars of onboarding: connections, compliance, clarification, and culture.

Use Cases

- Bridge the gap between candidate and worker until they receive Workday access. Example: Provide videos about your organization's history, mission, and values.
- Send a welcome message to keep new hires excited about their new role and reduce the risk of ‘no shows’.
- Give new hires access to forms and documents to review and complete.
- Collect essential documents. Example: Signed offer letters or identification documents.
- Set up payroll, benefits, and other compliance requirements using business process tasks
- Provide ongoing support and resources to help new hires integrate successfully. Example: Connect them with a co-worker.

Questions to Consider

Question	Considerations
How do you want to set up the Onboarding Plan service?	To configure when Onboarding Plans become available to new hires, you can setup the Onboarding Plan Assignment as a step on these business processes: • *Contract Contingent Worker* • *Employment Agreement* (Recruiting customers only) • *Hire* • *Offer* (Recruiting customers only)
Do you need unique onboarding plans for different onboarding groups?	You can use the Maintain Onboarding Plan Audiences task to assign plans to audiences. You can create Audiences using condition rules to send individualized content to groups of new starters based on set criteria.
Do you want to manually assign onboarding plans?	You can also use the Assign Onboarding Plan task to manually assign an onboarding plan outside of a business process. The onboarding plan assignment respects the plan audience configuration, which means you cannot manually select a specific plan for a person. However, you can select a person, and if the person has multiple eligible events, Workday will prompt you to select the correct event.
Do you want to inactivate an onboarding plan?	You cannot inactivate Onboarding Plans but you can inactivate specific plan assignments. You can use the Inactivate Onboarding Plan Assignment task to inactivate a plan assignment.

Question	Considerations
	You can also inactivate a plan assignment from the related actions menu for a specific plan assignment. You can use this task to rectify an incorrect plan assignment. A user can have only one active plan assignment. You must inactivate a plan assignment before reassigning another one.

What type of onboarding content do you wish to create for your onboarding audience?	You can use the Create Onboarding Content task to create:
	
	• You can create a Day 1 Overview Card and add it to an Onboarding Plan providing the new joiner with the key information they need in advance of their first day. You can include these details on the Day 1 Overview Card:
	    • Work Location
	    • Work Location
	    • First Day Start Time
	    • Orientation Location
	    • Orientation Start Time
	    • Instruction Overview
	    • Orientation Facilitator
	
	You can manually enter the information on each section of the card or use an External Field.
	
	For external fields you can create a Calc Field to get to specific information from any of these business objects:
	
	• Job Application
	• Job Requisition
	• Supervisory Organization
	
	• You can create a Message that will default to a Highlight when configuring an Onboarding Plan. This can be:
	    • A welcome message
	    • A message providing context on the organization or their new role.
	
	    To keep these messages short and engaging within the Highlights experience, Workday limits the messages to 228 characters for the body, and 36 characters for the title.

Question	Considerations

	• You can create a Video that you can add to the You Might Be Interested In slider on the Onboarding Plan or as a Highlights.
	
	Highlights enable you to spotlight videos or messages to improve engagement with onboarding content.
	
	Only video titles, limited to 36 characters, are shown in Highlights.
	
	You can use the You Might Be Interested In slider to showcase longer, optional video content with descriptions on videos limited to 240 characters.
	
	There is no length limit to the videos but Workday recommends using shorter videos in Highlights to improve engagement. New hires can view the Highlights and You Might Be Interested In videos multiple times within their plan.
	
	For recommended guidelines on uploading videos, see the Media Cloud documentation:FAQ: Uploading and Viewing Videos
	
	You can create an Announcement to include in an Onboarding Plan. You can embed links, custom reports, messages, images and videos into Announcements which will feature on the onboarding plan, allowing new hires to engage with multiple content types.
	
	• You can configure Notifications for each stage of the Onboarding Plan to let new hires know when new content is available.
	• Access the Edit Tenant Setup-Notifications task to configure routing rules to deliver Notifications using:
	  • Email
	  • SMS (Workday Messaging customers only)
	• You can use notification templates in Workday Notification Designer to customize Email notification with your organization's branding.
	
	You must have Workday Notification Designer enabled to use Email notifications with Onboarding.
	
	Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Please reference this Community Announcement for more information.

Question	Considerations
How do you want to inform new hires about new onboarding content?	You can create an Onboarding Card to show on the Workday homepage to help new employees track their onboarding progress and quickly access their plans.
Do you want to display Required Learning content to new hires?	You can use the Maintain Onboarding Section Configurations task to display the Required Learning for You section on onboarding plans. In this section you can display preconfigured learning content using up to 20 cards, making it easy for new hires to access and complete essential training. To display content on the Required Learning for You section, you need to: • Configure Required Learning. • Assign Required Learning items to the person receiving the onboarding plan. Note: Requires the Learning SKU.
Do you want to help new hires build connections by suggesting coworkers during onboarding?	You can use the Maintain Onboarding Section Configurations task to display the Connect with a Coworker section on onboarding plans. This section leverages machine learning to suggest colleagues for the new hire to connect with, helping them build relationships, navigate their new environment, and feel part of the team quickly. Note: Requires the Talent Optimization SKU.
Do you want to help new hires stay on track and engaged by displaying Journeys during their onboarding?	You can use the Maintain Onboarding Section Configurations task to display the Journeys for You section on onboarding plans. Journeys organize key tasks and resources into a single, easy-to-navigate space, helping new hires access what they need quickly, stay on track, and remain engaged during their first weeks and beyond. This personalized experience helps them build confidence from day one and navigate their onboarding more effectively. Note: Requires the Journeys SKU.
Do you want to use your organization's branding?	You can use the Create Onboarding External Brand task to maintain consistent branding for external preboarding by uploading your organization's: • Logo • Banner. See the Recruiting Career Site documentation for recommendations on best sizing for these images: Setup Considerations: Branding for External Career Sites Internal Onboarding experience takes its branding from Tenant branding. See recommendations for

Question	Considerations
	image sizing: Reference: Recommended Image Sizes for Tenant Branding
Data Purging	You use the Has Active Onboarding Plan Assignment report field on the *Job Application* and *Candidate* business objects to purge the candidate or the candidate job application or both.
Do you want to dynamically generate and distribute documents to New Hires?	You can configure the Generate Document action step in the *Onboarding* business process to use documents dynamically created with Workday Docs. You can then use the Review Document step to distribute these documents to new hires during onboarding. Example: Offer letters.

Recommendations

If you're using both External Preboarding and the Internal experience, Workday recommends that you configure audience condition rules for both the job application and the worker to ensure new hires retain access to content when they become workers. Once a worker exists, Workday ignores job application rules and uses only worker audience condition rules. (Recruiting customers only)

Requirements

External preboarding relies on the use of an external career site. (Recruiting customers only) Onboarding can be used on these business process:

- *Employment Agreement* (Recruiting customers only)
- *Offer* (Recruiting customers only)

Limitations

- New hires can only move forward in their onboarding plan and cannot navigate back to previous stages.
- Not supported for these business processes:
    - *Change Job*
    - *Add Additional Job*
    - *Start International Assignment*
- Not supported on native mobile app.

Tenant Setup

There are two Onboarding tasks used to access the existing Onboarding Dashboard and Onboarding Plans (from global search or homepage menu items). One is conditional and impacted by the Disable Onboarding Dashboard check box on the Edit Tenant Setup - HCM task, while the other will always point to the existing Onboarding Dashboard.

For the conditional task, when you leave the Disable Onboarding Dashboard check box unselected, Workday directs users with an active Onboarding Plan Assignment, or users that have ever had an active Onboarding plan including rehires, to the new Onboarding Plan homepage. Users without an assignment will continue to see the existing Onboarding Dashboard.

When you select the Disable Onboarding Dashboard check box, Workday directs all users to the new Onboarding Plan homepage.

- For users with no active plan and who have never had a plan, when the Disable Onboarding Dashboard check box is not selected:
  - Both static and dynamic tasks direct to the existing Onboarding Dashboard.
- When the Disable Onboarding Dashboard check box is selected:
  - The static task directs to the existing Onboarding Dashboard.
  - The dynamic task directs to the new Onboarding Experience.
- For users with an active plan or who have ever had a plan including rehires, when Disable Onboarding Dashboard check box is not selected:
  - The static task directs to the existing Onboarding Dashboard.
  - The dynamic task directs to the new Onboarding Plans experience.
- When the Disable Onboarding Dashboard checkbox is selected:
  - The static task directs to the existing Onboarding Dashboard.
  - The dynamic task directs to the new Onboarding Experience.

Security

Domain	Considerations
Set Up: Onboarding	Enables Administrators to access tasks on the Onboarding Planner.
Self Service: Onboarding	• Enables external Pre-Hires access to external pre-boarding self service tasks. [Recruiting customers only] • Enables Pre-Employees and Pre-Contingent Workers access internal Onboarding Plan tasks before Day 1. • Enables Workers and Contingent workers to self service Onboarding Plan tasks from Day 1.
View: Onboarding Plans Preview	Enables users to preview configuration of Onboarding Plan details for a person or Plan Assignment.
Manage: Onboarding Audience Condition Rules	Enables users to manage condition rules for audiences for Onboarding Plans.
Worker Data: Onboarding	Enables access to reports associated with onboarding plans.

Business Processes

You can configure the Onboarding Plan Assignment service step to these business processes to establish the starting point point from which an Onboarding Plan can be made available to new hires:

- *Contract Contingent Worker*
- *Employment Agreement* (Recruiting only)
- *Hire*
- *Offer* (Recruiting only)

When a new hire reaches a stage in a business process with a configured Onboarding Plan Assignment, step they are immediately:

- Assigned their Onboarding Plan Assignment.
- Placed into the most recent eligible stage you have configured.

- Receive any eligible notifications configured for that stage.

A new hire will only have access to one active onboarding plan at a time. Workday will grant access to this plan once the new hire reaches the first configured stage.

Reporting

Reports	Considerations
Onboarding Plan Assignments	You can use this report to get an overview of onboarding plan assignment details for workers or pre-hires assigned the plan
Onboarding Business Process Status Summary	Managers can use this report to view a summary of a recently hired worker's onboarding status for a supervisory organization. Example: The worker's contact information, hire date, position, hiring manager, and the status of their Onboarding business process.
Onboarding Advisories	You can use this report to address potential issues during the onboarding process, such as any new worker or pre-hire that may be missing an onboarding plan assignment.

Integrations

No impact.

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.

Related Information

Tasks

Set Up Onboarding Planner on page 505

Examples

Workday Community:Contributed Solution-General Configuration Guide.

Workday Community:Contributed Solution-Day 1 Card Configuration

Set Up Onboarding Planner

Prerequisites

Configure the *Set Up: Onboarding* domain in the Onboarding functional area.

Context

You can use the Onboarding Planner to configure and maintain onboarding plans for your new hires.

Steps

1. Access the Onboarding Planner report.

2. Complete the task:

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Overview</td><td>You can use the Maintain Hubs task to personalize the Onboarding Planner landing page with:
Custom Reports
Announcements
External Links</td></tr>
<tr><td>Plans</td><td>You can use the Create Plan task to create an Effective-Dated Onboarding Plan with a unique name and specify the number of days you want the plan to remain active.
You can Add up to 10 Onboarding Stage instances per plan and configure a Stage Trigger to determine when the plan is delivered to the new hire relative to the Hire Date.
You can add Notifications that trigger for a specific Audience at a specified stage.
You can use the Maintain Sections task to display or hide on onboarding plans for new hires:
Required Learning for You

You can enable this section to display preconfigured required learning content directly on the onboarding plan.

Note: Requires the Learning SKU.
Connect with a Coworker

You can enable this section to leverage machine learning to suggest colleagues for the new hire to connect with.

Note: Requires the Talent Optimization SKU.
Journeys for You

You can enable this section to display Journeys content on the onboarding plan.

Note: Requires the Journeys SKU.
You can use the Examine for Issues button to run the Examine for Onboarding Issues task to identify and correct misconfigured onboarding plans before they are assigned, helping reduce errors and ensure a smoother onboarding process. Example: Misconfigured security settings.</td></tr>
</table>

Option	Description
Audiences	Access the Maintain Onboarding Plan Audiences task to assign plans to audiences and set the plan hierarchy. You can create Audiences using condition rules to send personalized Onboarding Plans and individualized content to groups of new starters based on set criteria. Example: Region or Job Area. Maintain Audiences: You can create Audiences that you can use at both plan and content level for more granularity. You can create and select the rules from the Condition Rules prompt: • You can create *Job Application Condition Rules* to target new joiner access content as pre-hires through the External Preboarding site (Recruiting customer only) • You can create *Worker Condition Rules* for new joiners accessing content as Workers or Contingent Workers internally once they receive a Workday account. Audience Selection: You can assign Audiences to an Onboarding Plan. Note: If you're using both the External Preboarding and the internal experience, configure audience rules for both job application and worker to ensure new hires retain access to content when they become workers. Once a worker exists, only Worker audience condition rules are used and Job Application rules are ignored. (Recruiting customers only)
Content Library	You can use the Create Content task to create these types of content for Onboarding Plan: • Onboarding Announcement • Onboarding Bulletin • Onboarding Card • Onboarding Message • Onboarding Video Onboarding Card: You can create a Day 1 Overview Card and add it to a plan providing the new joiner with the key information they need in advance of their first day. You can include these details on the Day 1 Overview Card: • Work Location • First Day Start Time • Orientation Location

Option	Description
	• Orientation Start Time • Instruction Overview • Orientation Facilitator You can use Audience and Condition Rules to localize the content on the Day 1 Overview Card. You can also manually enter values for each field or use a dynamic External Field. You can also configure a custom object for Job Application or Worker to manage these values. You can also create Calculated Fields to get specific information from business objects. Example: Job Application. Onboarding Message: You can create a Message that will default to a Highlight when configuring an Onboarding Plan. This can be a welcome message, a message providing context on the organization or their new role. Onboarding Video: You can create a Video that you can add to the You Might be Interested In slider on the Onboarding Plan or as a Highlight. • Onboarding Announcement: You can create an Announcement to include in an Onboarding Plan. Note: Custom Reports and Tasks will not display in External Preboarding even when configured. Worker photos will display to external users with access to the Person Data: Personal Photo domain. (Recruiting customers only). You can use the task Copy Onboarding Dashboard Announcements to Onboarding Plan Announcements to select and copy existing Announcements that you have configured in the Onboarding Dashboard. Onboarding Bulletins: You can use the Create Onboarding Bulletin task to create a Bulletin as a new content type that you can use to ensure new hires access the content you want to make prominent in their onboarding plans.
Notifications	You can use the Create Notification task to set up notifications for each stage to let new hires know when new content is available. Access the Edit Tenant Setup-Notifications task to configure routing rules for the notifications.

Option	Description

	Enter Onboarding Plan Notifications under HCM for Email or SMS. (Workday Messaging customers only)
	
	Create and publish a Notification Template for Email notifications from Drive using the Onboarding Plan Notifications category.
	
	• You can use Notification Templates in Notification Designer to customize Email notification with your organization's branding.
	• You can link the new hire to their Onboarding Plan using any of these report fields:
	    • Onboarding Plan URL
	    • Onboarding Plan Day 1 Overview URL
	
	You can also create Calculated Fields to get specific information from business objects. Example: Job Application.
	• You can use report fields to personalize notifications for both Email and SMS, reducing the need to create multiple notifications.
	• You can use the using the Notification Events for Onboarding Plan Assignment report field to report on notifications.

Branding	You can use the Create External Branding task to upload your organization logo and banner for consistent branding for your Onboarding Plan in external preboarding. Once the new hire has tenant access, they will see tenant branding, which may differ from External Branding.
Reports	• The Onboarding Business Process Status Summary report enables you track recently hired workers' task completion status . • The Onboarding Plan Assignments report provides an overview of onboarding plan assignments for a worker or pre-hire. • The Onboarding Advisories report enables you address potential issues during the onboarding process. Example: A new worker or pre-hire missing an onboarding plan assignment.
Additional Configurations	Provides insights into business process definitions for: • Onboarding

Option	Description
	• All business processes that can be used to assign the Onboarding Plan to a new hire

Result

An onboarding administrator will be able to create and manage customized onboarding plans for new hires. The administrator can add relevant content, assign tasks, and configure when content is made available to new hires to ensure a structured experience.

Related Information

Concepts

Setup Considerations: Onboarding Experience on page 498

Examples

Workday Community:Contributed Solution-General Configuration Guide.

Workday Community:Contributed Solution-Day 1 Card Configuration

Steps: Set Up Workday Docs for Onboarding

Prerequisites

- Set Up Security for Drive for all users who create, edit, or view Docs templates.
- Security: *Security Configuration* domain in the System functional area.

Context

You can configure the Generate Document action step in the *Onboarding* business process to use documents dynamically created with Workday Docs. Then, you can use the Review Document step to distribute these documents to new hires during onboarding.

Steps

1. Create security groups for users who will be working with Docs templates, such as HR Administrators, and users who will be generating documents, such as recruiters.
2. To create Document Generation templates, configure these domains in the System functional area:
   - *Drive*
   - *Docs*
3. Access the Edit Tenant Setup – System task and configure DWXF as a supported file type.
4. Access Drive and select Document Template to create and publish your document templates.
5. On the Configure Document page, on the Select Source prompt, select *Onboarding* .
6. On the Select Category prompt, select *Onboarding* .
7. Click Create.

   Customize your Document Template. You can use the Insert Data Field section to search and add fields. Example: Legal Name.
8. Click Publish to save your template.
9. Access the *Onboarding* business process definition.
10. From the related actions menu of the *Onboarding* business process select Business Process Edit Definition and enter the Effective Date.
11. Click OK.

12. On the Business Process Steps tab, add a row and enter these details:

Order	Type	Specify	Group
b	Action	Generate Document	HR Administrator
c	Review Documents		HR Administrator

13. Click OK.
14. Click Configure Generate Document Step and on the Default Document prompt, select your Document Template from Drive Documents.

    On the Run As User prompt, select *Business Process Administrator* or the user that has been setup for the business process.
15. Click OK and Done.
16. Click OK and Done.
17. Click Configure Review Document Step and on the Document prompt, select Generate Document Step and select the appropriate Signature Options and Attachment Options.
18. Click OK and Done.

Result

When you Launch Onboarding for a new hire, they receive the Document Template you specified in the Generate Document step. They can then review the document, acknowledge it, and electronically sign it based on the Signature Options you selected.

Related Information

Tasks

Steps: Set Up Workday Docs for Onboarding on page 510

Examples

Workday Community:Contributed Solution-General Configuration Guide.

Workday Community:Contributed Solution-Day 1 Card Configurationy

Concept: Onboarding Experience

With Workday Onboarding Experience, you can create a personalized and engaging experience for new hires at different stages of their journey from candidates to workers. This ensures that new team members feel informed, connected, and ready to succeed in their new roles.

Preboarding

This is the stage between Offer and the first day. Preboarding focuses on bridging the candidate and worker experience.

External preboarding is conducted outside of the Workday tenant using the Candidate Home login credentials. Example: When a candidate has an active plan assignment, they will see the Onboarding button on the candidate home page to be able to review information about their Day 1 activities, or view a video about the organization's culture, before their start date. Once the candidate has reached their Hire Date, or they have logged into their Workday tenant for the first time, the preboarding site will show a message to direct them to the Workday tenant for Onboarding (see below).

Internal preboarding is conducted within the Workday tenant using Workday credentials. Example: A new hire uses their Workday and organization login credentials to complete their Payment Elections task, before their start date.

You can provide your new hires with login credentials before their Day 1.

Onboarding

Onboarding is a continuation of the pre-boarding experience, delivering onboarding content to the new team members within the Workday tenant.

Onboarding Plan

The Onboarding Plan surfaces tasks configured in the Onboarding business process, for new hires to complete and track their progress of onboarding tasks. You can use the Onboarding Plan to deliver content in stages over a configurable period of time, so as not to overwhelm your new team members.

Workday provides an entry point to the Onboarding Plan from the Workday homepage using a configurable onboarding card.

Onboarding Planner

The Onboarding Planner is a centralized space for onboarding administrators to configure and manage Onboarding Plans and related content.

Onboarding Stage

A configured period of time, in relation to the hire date, that shows the new hire defined content on their Onboarding Plan Assignment.

Onboarding Plan Assignment

An Onboarding Plan Assignment is a structured series of tasks assigned to individual new hires with content that they must review and complete during their onboarding process. Depending on your business process configuration, these tasks can have target due dates to ensure timely completion. Example: An Onboarding Plan Assignment can include any or all of the following:

- First-day office tour and workspace setup using a Day 1 Card.
- Job-specific training modules, product or service knowledge training, and company culture immersion activities using Videos.
- Compliance tasks using *Onboarding* business process tasks.
- New hire-specific content delivered as a message, link, or video using an Announcement.
- Company culture immersion information delivered as a short message or video using a Highlight.

Related Information

Concepts

Concept: Onboarding Experience on page 511

Examples

Workday Community:Contributed Solution-General Configuration Guide.

Workday Community:Contributed Solution-Day 1 Card Configuration

FAQ: Onboarding Experience

When can you not modify an onboarding stage?	You can’t change stage triggers or delete a stage after you have assigned an onboarding plan to an individual. Changing the stage trigger or deleting a stage could disrupt the individual’s progression through a plan.
What if the Hire Date changes? Will the new hire receive a new preboarding plan?	Any stages that the new hire has already reached will stay unchanged, but future stage triggers will adjust based on the new hire date.

Can you go back to a previous stage?	No, you can only move forward through onboarding stages. To ensure new hires don't miss important content, use the Content Available Until End Of field. This allows you to set a specific number of days to keep content accessible, so it remains available for review throughout multiple stages of their onboarding. You can configure this using a related action from the stage content after setting up the stages .

Related Information

Concepts

Setup Considerations: Onboarding Experience on page 498

Examples

Workday Community:Contributed Solution-General Configuration Guide.

Workday Community:Contributed Solution-Day 1 Card Configuration

Staffing

Setup Considerations: Staffing

You can use this topic to help make decisions when planning your configuration and use of key staffing features. 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

Staffing features in Workday enable you to create jobs, manage your workforce, and report on a range of employment details to guide decisions in your organization.

Business Benefits

With staffing features, you can:

- Flexibly manage employees during onboarding, job changes, additional jobs, assignments, and termination.
- Report on a range of details to inform your decisions.
- Track staffing and employment details that your organization requires.
- Track and generate contracts and agreements to help comply with regulatory requirements.
- Process staffing events in bulk, such as hires and terminations, reducing manual effort.

Use Cases

You can use staffing features to:

- Create a job catalog to group your jobs into families.
- Create job requisitions to track requirements for positions.

- Hire employees and contingent workers into jobs and positions.
- Transfer, promote, or change job details for workers.
- Create employment agreements to outline conditions of employment for pre-hire contracts.
- Create and renew contracts for employees.
- Assign country-specific notice periods and probation periods to employees.
- Set up unions and assign collective agreements to employees.
- Manage headcount through headcount plan reports.
- Terminate employees or end contingent worker contracts.
- Manage retired employees.

Questions to Consider

Questions	Considerations
How do you want to fill job openings in your organization?	Workday enables you to fill jobs and positions using these staffing models: • Job management • Position management Position management provides greater control over hiring and enables you to define hiring requirements for each position. Position management is a useful staffing model to use if your organization prefers defining detailed job requirements. Job management hiring requirements apply to all jobs in the supervisory organization. There are also no limits on the number of jobs that you can fill. Job management is a useful staffing model to use if your organization defines broad job requirements. Certain features are only applicable to 1 staffing model. Example: You can only swap positions for workers in the position management staffing model.
How do you want to organize your job profiles?	You can set up a job catalog to create job profiles that define characteristics for jobs and positions. When you want to group related job profiles, you can create job families. You can also group related job families into job family groups. Workday can populate downstream businesses with details from the job profile. You can also create eligibility rules based on job details. You can use management levels to categorize job profiles based on management types or compare similar roles across an organization.
How do you want to manage employees with multiple jobs?	You can enable multiple jobs, international assignments, and domestic assignments to place an employee with a primary job or position into another job or position.

Questions	Considerations
	Workday populates many fields for the additional job from the position or job requisition. If you use job requisitions, you can't change those fields on the additional job because you must update the job requisition instead. Workday Payroll for the UK and Workday Payroll for France don't support multiple jobs.
How do you want to assess candidates for a job or position?	If you use Workday Recruiting, you can use job requisitions to assess candidates that you're hiring. If you don't use Workday Recruiting, you can use job requisitions for employment agreements to outline employment requirements for new hires and internal candidates changing jobs.
How do you want to manage job changes for employees?	You can create simplified job changes for initiators using the templates for the *Change Job* business process. You can also configure Workday Assistant to help complete job changes.

Recommendations

To improve user experience, Workday recommends that you hide or enable:

- Optional fields on the Configure Optional Fields task.
- Localized fields on the Maintain Localization Settings task.

Requirements

Set up a single staffing model for each supervisory organization.

Limitations

After you assign a worker to a supervisory organization, you can't change the staffing model.

If a step is secured by the Employee as Self security group, but the assigned user has a future hire date, the task is unassigned. A task can also be unassigned if the assigned user's Workday Account is disabled, expired, or locked, or if the assigned user has no Workday Account to view their notification or complete their assigned step. To resolve this issue, you must:

- Access the Unassigned Tasks report to view steps with unassigned tasks.
- Add the Pre-Employee as Self security group to the step.

Tenant Setup

Access the Edit Tenant Setup - HCM task to enable:

- Management levels and job hierarchies.
- Multiple jobs for employees.
- Overlap between jobs.

Security

Configure these domains in the Staffing functional area:

Domains	Considerations
Self-Service: Staffing Reports	Enables users to access reports with their employment details.
Set Up: Staffing	Enables users to set up features such as: • Collective agreements. • Employee contracts. • Staffing models. • Terminations.
Staffing Actions	Enables users to manage staffing data in business processes.
Worker Data: Staffing	Enables users to access staffing data.

Business Processes

Business Processes	Considerations
Add Additional Job	Enables you to place an employee with a primary job or position into another job or position when using multiple jobs functionality. You can enable autocomplete for this business process to complete events that initiate from Workday Recruiting automatically.
Change Job	Enables you to manage job changes such as promotions, job detail changes, and transfers. You can enable autocomplete for this business process to complete events that initiate from Workday Recruiting automatically.
Change Organization Assignments	Enables you to change organization assignments. You can enable autocomplete for this business process.
Contract Contingent Worker	Enables you to hire contingent workers into open positions and optionally create purchase orders. You can enable autocomplete for this business process to complete events that initiate from Workday Recruiting automatically.
Create Position	Enables you to create positions for the position management staffing model. You can enable autocomplete for this business process.
End Contingent Worker Contract	Enables you to end a contingent worker's contract. You can also create a mass actions workbook to initiate ending contingent worker contracts in bulk.
Hire	Enables you to hire pre-hires or former workers into jobs or positions in your organization. You can enable autocomplete for this business process to complete events that initiate from Workday Recruiting automatically.
Hiring Restrictions	Enables you to set hiring restrictions for the job management staffing model.

Business Processes	Considerations
Termination	Enables you to manage terminations for employees. You can also create a mass actions workbook to initiate terminations for employees in bulk.

A subset of staffing business processes supports Workday Docs to create document templates for worker documents.

Reporting

Reports	Considerations
Active Employees	View employment details for all active employees in all organizations.
All Contingent Workers	View all employment details for contingent workers.
Critical Open Positions	View unfilled critical positions by supervisory organization.
Headcount Analysis	View headcount by supervisory organization.
Position Summary	View information about all positions in your organization.
Worker's Job History	View the job history for 1 or more workers.

Integrations

Web Services	Considerations
Add Additional Job	Enables you to add additional jobs for workers when they have multiple jobs.
Change Job	Enables you to perform changes for workers when they change jobs, job details, or location.
Change Organization Assignments	Enables you to change the organizations that are assigned to workers.
Contract Contingent Worker	Enables you to hire contingent workers for contracts.
Create Position	Enables you to create positions for the position management staffing model.
End Contingent Worker Contract	Enables you to end contracts for contingent workers.
Hire Employee	Enables you to hire pre-hires into jobs or positions.
Set Hiring Restrictions	Enables you to set hiring restrictions for jobs in the job management staffing model.
Terminate Employee	Enables you to terminate employees.

Connections and Touchpoints

Features	Considerations
Absence	You can configure absence rules and calculations based on employment and position data to determine absence plan eligibility.
Benefits	You can configure benefit eligibility rules based on employment, position, and organization data. Organizations can also impact security for ESS.
Budgets	Job families, job family groups, or job profiles can determine the plan structure in financial budgets and position budgets. Position budgets only support the position management staffing model. Financial budgets support both position and job management staffing models.
Compensation	You can configure compensation eligibility rules based on employment and position data to determine compensation plan eligibility.
Expenses	If you deploy Expenses after HCM, you might require changes to management levels. Management levels can determine routing and approvals for business processes related to Expenses.
Payroll CAN Payroll FRA Payroll UK Payroll US	Your configuration of staffing components, such as organization assignments and positions, have a significant impact on Payroll products. Workday recommends that you review the Workday Touchpoints Kit for your Payroll product.
Procurement	You can use Procurement to track and manage contingent workers, their expenses, and business assets assigned to your workforce.
Recruiting	Recruiting uses job requisitions that represent an organizational document to request a new hire. You can require a job requisition for all position management staffing events, conditionally require them based on rules, or not require job requisitions. Job requisitions support both the position and job management staffing models.
Succession Planning	You can link job profiles and job families to competencies. Succession plans are also linked to positions.
Time Tracking	You can configure time tracking eligibility rules based on employment and position data to determine working time calculations.

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: Job Changes on page 838
Setup Considerations: Employment Agreements on page 631
Setup Considerations: Employee Contracts on page 652
Setup Considerations: Collective Agreements on page 641
Setup Considerations: Notice Periods on page 679
Setup Considerations: Probation Periods on page 667
Concept: Key HCM Reports by Functional Area on page 2970
Concept: Workday Docs for Business Processes
Concept: Autocomplete Business Processes

Tasks

Steps: Set Up Workday Docs

Reference

Reference: Staffing Model Comparisons on page 586
Reference: Business Processes That Support Workday Docs

Setup Considerations: Autocomplete Staffing Events

You can use this topic to help make decisions when planning your configuration and use of autocomplete for staffing business processes. 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 enable autocomplete on these business process definitions to automatically complete hire events or job changes that initiate from Workday Recruiting:

- *Add Additional Job*
- *Change Job*
- *Contract Contingent Worker*
- *Hire*

Once a candidate is *Ready for Hire*, Workday attempts to complete the event initiation step and the rest of the business process. Any steps that can't autocomplete route normally.

Business Benefits

You can use autocomplete to streamline the flow from Workday Recruiting to staffing business processes. This configuration reduces manual labor and errors because you only need to enter information once when hiring a candidate.

Autocomplete also decreases the number of tasks in My Tasks for managers and administrators to complete by skipping some parts of the parent event, including:

- Approval
- Batch/Job
- Checklist

- Complete Questionnaire
- Edit Additional Data
- Report
- Report Group
- Review action step
- To Do

When you enable autocomplete on a business process definition, you can select which steps you want to route normally. Integrations and service steps always route normally.

Use Cases

You can autocomplete external and internal hires from Workday Recruiting. Autocomplete helps you more easily fill positions that don't usually require additional information or manual input, such as:

- High-volume hires.
- Retail positions.
- Seasonal positions.

Questions to Consider

Questions	Considerations
What information do you need in order to hire a worker in your organization?	Autocomplete uses fields entered in Workday Recruiting and Staffing Field Defaults. When a hire event requires fields that don't populate from one of these sources, the event can't autocomplete. Instead, Workday reverts to the normal routing configured in the staffing business process definition. You can create rules to ensure that required staffing fields have values when you opt into and configure the Staffing Field Defaults feature. Test populating fields thoroughly to ensure that they provide the correct values for business processes that you want to autocomplete.
How do you want autocomplete to affect your staffing subprocesses?	You can enable autocomplete on these staffing subprocesses: • *Assign Employee Collective Agreement* • *Assign Pay Group* • *Change Organization Assignments for Worker* • *Edit Notice Periods* • *Employee Contract* • *End Payroll Inputs* • *Manage Probation Period* • *Propose Compensation Change* • *Propose Compensation Hire* • *Request One-Time Payment* • *Request Stock Grant* All other subprocesses route normally. Subprocesses with autocomplete enabled will attempt to autocomplete every time data is

Questions	Considerations
	available and valid for all fields. To prevent these subprocesses from autocompleting, you can use separate business process definitions without autocomplete enabled. The details of your autocomplete configuration depend on the subprocess. Example: You enable autocomplete on the *Employee Contract* business process definition. To complete the subprocess automatically, you must also configure a default contract status for the relevant parent business processes.
Do workers in your organization have multiple jobs?	When you have multiple jobs enabled in your tenant, autocomplete doesn't skip the staffing action to select *Change Job* or *Add Additional Job* for internal hires. Once the staffing action is complete, the selected business process will attempt to autocomplete normally.
Do you want to ensure that only some events autocomplete?	You can use rule-based business process definitions to specify which events should autocomplete. Example: Your retail store enables autocomplete for hiring cashiers, but not for a vice president, who is more likely to need additional manual input.
Do you use consolidated templates for your *Change Job* business process definitions?	You can only autocomplete a consolidated *Change Job* business process definition when all consolidated subprocesses are also configured to autocomplete. Example: You enable a consolidated *Change Job* business process definition to autocomplete. You decide not to configure the *Propose Compensation Change* subprocess to autocomplete, so you remove it from the consolidated template. When any subprocess on the consolidated template fails to autocomplete, the parent process also fails to autocomplete.
Do you want to alter your recruiting timeline to incorporate autocomplete functionality?	When you move a candidate into *Ready for Hire* status, Workday attempts to autocomplete the event instantly. You might want to modify your current recruiting process to account for this change in the hiring timeline. Example: You normally move candidates to *Ready for Hire* as soon as the recruiting process completes. To retain flexibility when you enable autocomplete, you modify your processes to move candidates to *Ready for Hire* within a week of their Hire Date.
Do you use the *Offer* business process in your organization?	The hire event populates the Hire Reason using information entered in the *Offer* business process. When you don't use the *Offer* business process:

Questions	Considerations
	• Ensure that the *Hire* business process doesn't require a Hire Reason. • Workday populates the Hire Date for the hire event from the Target Hire Date on the job requisition.

Recommendations

- Because autocomplete can remove approvals and other verifying steps, configure autocomplete only for events that aren't likely to need additional information or manual input.
- Because job changes always require a hire reason, configure the *Offer* business process to require the Hire Reason field. This configuration ensures that recruiters always complete the field.
- If you add additional jobs from Recruiting, ensure that you select Multiple Jobs as the position setup option in the Edit Tenant Setup – HCM task.
- If you would like skipped steps to run even when an event successfully autocompletes, Workday recommends that you configure the Route Normally prompt for business processes and specify the skipped steps you would like to execute.

Requirements

To ensure that staffing events have all required field values, Workday only enables you to autocomplete staffing events that initiate from Workday Recruiting.

Limitations

Autocomplete doesn't support send-backs.

While service steps never skip, the notifications for service steps always skip.

Tenant

Autocomplete doesn't support the Work Hours Profile field in the Position Setup Options prompt on the Edit Tenant Setup - HCM task because the field isn't available in Recruiting.

Security

To autocomplete a staffing event, you must specify which security groups can initiate and complete the event from the job application. When someone without the correct security moves a candidate to *Ready for Hire* from Workday Recruiting, the event doesn't autocomplete.

Business Processes

When your *Ready for Hire* business process definition includes *Batch/Job* steps, select the Don't wait for this step to complete, move immediately to the next step check box on every *Batch/Job* step. This configuration ensures that the staffing event can autocomplete.

Workday sends custom business process notifications on business processes that autocomplete. You can configure a step condition to bypass the custom notification.

Reporting

If you want to report on events that have automatically completed using the autocomplete functionality, not through a web service, Workday recommends that you create custom reports that include the External Load and the Event Autocompleted fields.

You can set the filter parameters on these fields to flag as:

- False for External Load
- True for Event Autocompleted

Integrations

The autocomplete setting on a staffing business process definition doesn't affect web services.

When you enable autocomplete and configure custom notifications on a business process definition, Workday creates an event record and generates a custom notification for action steps that initiate subprocesses. But when you initiate a business process that allows autocomplete through a web service, Workday creates an event record but doesn’t generate a custom notification for action steps that initiate subprocesses.

Connections and Touchpoints

Autocomplete for staffing events interacts with:

- Compensation.
- Payroll.
- Workday Recruiting.

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.

Related Information

Concepts

Concept: Autocomplete Business Processes

Tasks

Hire Employees on page 690

Steps: Set Up Job Changes on page 844

Steps: Set Up Contingent Workers on page 722

Add Additional Jobs on page 879

Set Up Recruiting to Staffing Field Defaults on page 205

Set Up Security to Autocomplete Staffing Events

Prerequisites

Enable autocomplete on the relevant staffing business process definitions.

Context

Specify who can initiate staffing events that autocomplete from Workday Recruiting.

Steps

1. Access the business process security policy for the staffing process that you want to autocomplete and add security groups to the initiating action.

   This configuration ensures that users can initiate the business process when they move a candidate to *Ready for Hire*.
2. Access the *Job Application* business process definition.

3. Select View Dynamic Definition.

   For every application stage tab that has *Ready for Hire* specified as a possible next step:

   a. Access the related actions menu in the Step column of the *Ready for Hire* specified action step and select Business Process > Configure Dynamic Completion Step.
   b. Add security groups to the actions that you want to autocomplete. These actions must match the business process definitions configured in Step 1.
4. (Optional) When you have multiple jobs enabled in your tenant, and you enable autocomplete on either the *Change Job* or *Add Additional Job* business processes:

   a. Access the *Ready for Hire* business process security policy.
   b. Add security groups to the Staffing Action action step. These security groups must match the groups selected in Step 3 to ensure that the job change autocompletes correctly.

   This configuration ensures that the *Change Job* and *Add Additional Job* business processes autocomplete correctly after you complete the staffing action for an internal hire from Workday Recruiting.

Result

Users can initiate staffing events that autocomplete when moving candidates into the *Ready for Hire* step in Workday Recruiting.

Example

Example: You enable autocomplete on the *Hire* business process. To ensure that recruiters can autocomplete hires, you add the Recruiter security group to:

- The *Hire* business process definition initiating action.
- The Hire Employee action on the *Job Application* dynamic completion steps.

Related Information
Tasks
Hire Employees on page 690
Steps: Set Up Job Changes on page 844
Steps: Set Up Contingent Workers on page 722
Add Additional Jobs on page 879

Steps: Set Up Workday Assistant for Staffing

Prerequisites

Review setup considerations for Workday Assistant and Workday Staffing.

Configure these domain security policies in the Staffing functional area:

- *Staffing Actions*
- *Staffing Organizations* (for consolidated templates)
- *Worker Data: Collective Agreements*

Configure these domain security policies in the Advanced Compensation functional area for consolidated templates:

- *Add Compensation Management Plans*
- *Change Compensation Management Plans*

Context

You can use Workday Assistant to:

- Access the Start Job Change task.
- Initiate *Change Job* business process transactions using Change Job templates.

Steps

1. Set up Workday Assistant.

   Steps: Set Up Workday Assistant.
2. Access the Edit Tenant Setup - Assistant task.

   In the Staffing section, enable 1 of these options:

   - Enable Change Job Templates
   - Enable Change Job

   Security: *Set Up: Tenant Setup - Assistant* domain in the System functional area.
3. Access the Maintain Change Job Templates task.

   In the Enable For Initiating Action column, add Workday Assistant / REST API.

   Security: *Set Up: Staffing* domain in the Staffing functional area.

Related Information

Concepts

Setup Considerations: Staffing on page 513
Setup Considerations: Workday Assistant on page 2974

Basic Staffing Information

Steps: Set Up Basic Staffing Information

Context

Set up basic staffing information to support job profiles. Although not required, this basic staffing information adds detail and depth to your definition of a job. When you perform staffing tasks such as hiring or transferring employees, Workday automatically populates this information from the job profile.

You can also report on basic staffing information with a number of standard reports. For a list, access Workday Standard Reports and select the *Set Up Staffing* category.

Steps

1. Set Up Management Level Hierarchies on page 526.
2. Set Up Job Level Hierarchies on page 527.
3. Create Job Categories on page 528.
4. Create Job Classification Groups on page 529.
5. Set Up Employee Types on page 530.
6. Create Contingent Worker Types on page 532.
7. Create Company Insider Types on page 533.
8. Create Work Shifts on page 534.
9. Set Up Work Hours Profiles on page 535.
10. Steps: Set Up Working Time Localized Fields on page 550.
11. Steps: Set Up Working Time Rules on page 551

12. Create Pay Rate Types on page 554.
13. Change Worker Service Dates on page 541.

Next Steps

Create the job catalog, including job profiles, job families, and job family groups.

Related Information
Tasks
Steps: Set Up Job Catalog on page 568
Reference
The Next Level: Reporting Foundation - Core HCM

Set Up Management Level Hierarchies

Prerequisites

Security: *Set Up: Position* domain in the Jobs & Positions functional area.

Context

You can use management levels to categorize job profiles based on management types, or compare similar roles across an organization. Example: A particular job profile belongs to the *Director* management level, while another job profile belongs to the *Individual Contributor* level. When you create a new hierarchy using existing management levels, you still must assign the management levels to job profiles.

Steps

1. Access the Maintain Management Types task.
    a) Set up the management types that you want to include in the management level hierarchy. Example: *Chief Executive Officer*, *Director*, *Manager*, and *Individual Contributor*.

    Note: Once management types are in use, you can rename but not delete them.
2. Access the Create Management Level Hierarchy task.
    a) In the Management Type prompt, select a management type to use as the name of your hierarchy, and create the hierarchy.
    b) Select Level > Insert Subordinate Level from the related actions menu of the management hierarchy name.
    c) In the Management Type field, select the highest management type in the hierarchy.

        This management type displays as level 1 in the Order column. Additional subordinate levels display as level 1, 2, 3, and so on.
    d) (Optional) Select Level > Insert Peer Level from the related actions menu of the management level. Peer levels will also display as level 1, 2, 3, and so on.
    e) (Optional) To create equal levels, select Level > Insert Subordinate Level from the related actions menu of the management level name. These subordinate levels will display as level 1.1, 1.2, 1.3, and so on.
3. Continue to use the related actions menu to insert management levels until the hierarchy is complete.
4. Access the Edit Tenant Setup – HCM task. Select your new hierarchy on the Management Level Hierarchy field.

Next Steps

- Assign management levels to job profiles in the Create Job Profile task.

- Hide level numbers by selecting the Hide Management and Job Levels check box in the Edit Tenant Setup – HCM task.
- Provide access to information for workers across organizations by setting up a management level-based security group.

Related Information

Tasks

Create Job Profiles on page 573

Steps: View Talent Across Organizations on page 1813

Reference

Reference: Edit Tenant Setup - HCM

Set Up Job Level Hierarchies

Prerequisites

Security: *Set Up: Job* domain in the Jobs & Positions functional area.

Context

You can use job levels to categorize job profiles based on factors like the level of education, experience, or training required for the job. Example: A particular job profile belongs to the *Principal Consultant* job level, while another job profile belongs to the *Consultant* job level.

Steps

1. Access the Create Job Level Hierarchy task.
2. In the Name field, enter a name for your job hierarchy.
3. Select Level > Insert Subordinate Level from the related actions menu of the hierarchy name.
4. In the Name field, enter the highest job level type in the hierarchy.

   This job level type displays as level 1 in the Order column. Additional subordinate levels display as level 1, 2, 3, and so on.

   Note: Once job levels are in use, you can rename them but not delete them.
5. (Optional) Select Level > Insert Peer Level from the related actions menu of the job level. Peer levels display as level 1, 2, 3, and so on.
   a) (Optional) To create equal levels, select Level > Insert Subordinate Level from the related actions menu of the management level. These subordinate levels will display as level 1.1, 1.2, 1.3, and so on.
6. Continue to use the related actions menu to insert job levels until the job level hierarchy is complete.
7. Access the Edit Tenant Setup – HCM task. Select your new hierarchy on the Job Level Hierarchy field.

Next Steps

Assign job levels to job profiles. Access the:

- Create Job Profile task to add the job level to new job profiles.
- Edit Job Profile task to add the job level to existing job profiles.

Select the job level on the Job Level prompt in the Category Details section.

You can hide level numbers by selecting the Hide Management and Job Levels check box on the Edit Tenant Setup – HCM task.

Related Information
Tasks
Steps: Set Up Basic Staffing Information on page 525
Create Job Profiles on page 573
Reference
Reference: Edit Tenant Setup - HCM

Create Job Categories

Prerequisites

Security: *Set Up: Job* domain in the Jobs & Positions functional area.

Context

You can use job categories to group job profiles by broad categories. You can define your own job categories based on your company's needs.

Steps

1. Access the Maintain Job Categories task.
2. For each category, specify the Job Category Name and Job Category Description.

Example

Job Category Name	Job Category Description
Direct Labor	Workers directly involved in the production of goods or services.
Indirect Labor	Workers who don't directly produce goods or services, but who make their production possible or more efficient. Indirect labor costs are'nt readily identifiable with a specific task or work order.
Sales Labor	Workers who are directly involved in the selling of goods and services.
Research contract and grant administration	Workers who are responsible for administration and monitoring of research contracts and research grants.
Data collection, processing, and analysis	Workers who collect, process, and analyze data.

Next Steps

Assign a job category to a job profile. When you staff a job or position based on a job profile, the assigned job category populates.

During a hire, transfer, or other staffing event, you can't override or modify job categories that populate to a worker's job or position.

Related Information
Tasks
Steps: Set Up Basic Staffing Information on page 525
Create Job Profiles on page 573

Create Job Classification Groups

Prerequisites

Security: *Set Up: Job* domain in the Jobs & Positions functional area.

Context

You can use Job classifications for job-related regulatory reporting and to categorize job profiles. Combine your job classifications into job classification groups so that you can meet occupation or job-related reporting requirements. You can define job classification groups for jobs or positions in all locations or a specific country or region.

Note: Once job classifications are in use, you can inactivate them but not delete them.

Workday also delivers several country-specific job classification groups.

Steps

1. Access the Create Job Classification Group task.
2. As you complete the task, consider:

Option	Description
Job Classification Group Mapping	If using Workday for compliance reporting, select a Workday-delivered job classification group. Select: • *Primary Function (IPEDS)* to use this job classification group for IPEDS reporting. • *DSN Job Classification Group (PCS-ESE 2003)* to use this job classification group in Déclaration Sociale Nominative (DSN) reporting. • *DSN Job Classification Group (Complément PCS-ESE 2003)* to report complementary PCS-ESE codes in DSN reporting.
Maps to	For U.S. EEO and IPEDS reporting only. Select the EEO or IPEDS occupational category that your job classification maps to. You can use this mapping to expedite downstream reporting specific to that reporting entity.

Next Steps

Add job classifications to job profiles. The job classifications that you assign to a job profile can come from different job classification groups. When you fill a job or position based on a job profile, Workday automatically assigns the job classifications on the job profile to the worker.

When a job profile has multiple job classifications, Workday automatically populates the classifications applicable to all countries and any country- or region-specific classifications. Workday uses the job location address of a worker to determine the country or region-specific classifications to associate with the worker.

You can assign additional classifications to a job or position during staffing events, such as hires or transfers, or when you edit a job or position. However, you can't override classifications that automatically populate from the job profile during those events.

Related Information

Tasks

Steps: Set Up Basic Staffing Information on page 525

Create Job Profiles on page 573

Steps: Set Up EEO Reporting on page 164

Steps: Set Up Reporting for IPEDS

Maintain Localization Settings on page 144

Reference

Workday Community: Job Classificaton Groups

Set Up Employee Types

Prerequisites

Security: *Set Up: Position* domain in the Jobs & Positions functional area.

Context

You can configure employee types to best suit your organizational needs. Once configured, you can assign employee types to workers during staffing processes. You can also configure employee types into:

- Business process condition rules.
- Eligibility rules, including Benefits and Compensation eligibility rules.
- Position restrictions.
- Reporting.

Steps

1. Access the Maintain Employee Types task.
2. Specify an Employee Type Name and an Employee Type Description for each type of employee that applies to workers in your organization.

   Examples: *Regular*, *Intern*, or *Temporary*.
3. (Optional) Select the Fixed Term Employee, Seasonal, Trainee, or Inactive check boxes.

   Local regulations might require you to identify certain employee type characteristics.

   The characteristic you select shows up in the Employee Type Name. Example: You create an employee type for interns and select the Fixed Term Employee and Trainee check boxes. The employee type displays as *Intern (Fixed Term) (Trainee)* on the worker profile.

   You can select the Inactivate check box to identify employee types you don't want to use anymore, but you can't delete employee types.
4. (Optional) In the Restricted to Countries field, select 1 or more countries in which the employee type applies.

   Leave the field blank if the employee type is applicable in all countries.

   Note: Restricting employee types to a country doesn't prevent you hiring that employee type in other countries. When you hire an employee, the All prompt category in the Employee Type field lists all employee types, even those that aren't intended for the current country. You can use the For Current Country prompt category to limit your selection to employee types that are restricted to that country and those applicable in any country.

Related Information

Concepts

Concept: Hiring Restrictions on page 585

Tasks

Steps: Set Up Basic Staffing Information on page 525

Hire Employees on page 690
Create Benefit Eligibility Rules on page 1255
Create Eligibility Rules for Compensation on page 986
Configure Rule-Based Business Processes

Steps: Set Up Time Types and Subtypes

Context

You can use variable time types to categorize workers who aren't full-time or part-time. Variable time type provides insight into your workforce, job posting accuracy, and compliance in countries that legally require a time type for all workers.

Example: You can categorize workers who work only on demand with no guarantee of continuous employment as variable time type workers in Workday.

You can also configure time type subtypes to gain more granularity on time types for workers.

Example: You can create a Seasonal Time Type subtype to distinguish between part-time, full-time, and variable seasonal workers.

These business processes support variable time types:

- *Add Additional Job*
- *Change Job*
- *Contract Contingent Worker*
- *Create Position*
- *Edit Position*
- *Edit Position Restrictions*
- *Evergreen Requisition*
- *Hire*
- *Job Requisition*
- *Start International Assignment*

Note: For pricing purposes, Workday recognizes variable time type workers as part-time workers. In order forms, variable time type workers are referred to as part-time workers.

Steps

1. Access the Maintain Time Types task.

   Clear the Inactive check box to enable variable time.

   Enter an override for variable time in the Time Type Override field to replace *Variable time* with a label to suit your business needs. Example: Override *Variable time* with *Flex* to identity variable time type workers in your organization as flex workers.

   Security: *Set Up: Jobs & Positions* domain in the Jobs & Positions functional area.
2. Translate Business Data.

   Translate time types and variable time overrides.
3. Access the Maintain Time Type Subtypes task.

   Configure time type subtypes for your organization.

   Examples of annually recurring time type subtypes:

Name	Description
Full-Time Seasonal	Requires employees to work full-time for fewer than 12 months per year.

Name	Description
Part-Time Seasonal	Requires employees to work part-time for fewer than 12 months a year.
Variable Seasonal	Requires employees to work: • Fewer than 12 months per year. • An irregular number of hours or days without a prearranged schedule.

Security: *Set Up: Position* domain in the Jobs & Positions functional area.

4. Hide or Require Optional Fields.

   Select 1 of these options from the By Functional Area prompt and require the *Time Type Subtype* field for all users or by security groups:

   - *Add Additional Job*
   - *Contract Contingent Worker*
   - *Change Job*
   - *Create Position*
   - *Edit Position*
   - *Edit Position Restriction*
   - *Hire*
   - *Start International Assignment*

   These business processes don't support time type subtypes:

   - *Evergreen Requisition*
   - *Job Requisition*
5. (Optional) Create Custom Labels.

   Select *Staffing* from the Term Context prompt and enter overrides for time type subtype.

Result

You can select a:

- Time type subtype on the business processes you configure.
- Variable time type from the Time Type prompt on the business processes you configure.
- Variable time type for job alerts.

Related Information

Reference

2023R2 What's New Post: Variable Time Type

Create Contingent Worker Types

Prerequisites

Security: *Set Up: Position* domain in the Jobs & Positions functional area.

Context

You can define contingent worker types to categorize and track contingent workers in your organization. You can also use contingent worker types to generate purchase orders.

Steps

1. Access the Maintain Contingent Worker Types task.

2. Specify a Contingent Worker Type Name for each type of contingent worker contracted by your organization.
   Examples: *Consultant*, *Contractor*, or *Vendor*.
3. (Optional) Select the Require Cost Information on Job Requisition check box if you use job requisitions and plan to create purchase orders automatically from contingent worker requisitions.
4. (Optional) In the Restricted to Countries field, select 1 or more countries in which the contingent worker type applies.

   Leave the field blank if the contingent worker type is applicable in all countries.

   Note: Restricting contingent worker types to a country doesn't prevent you from contracting that contingent worker type in other countries. The Contingent Worker Types prompt category in the Contingent Worker Type field lists all contingent worker types, even types not intended for the current country. The For Current Country prompt category limits your selection to contingent worker types restricted to that country and applicable in any country.
5. (Optional) Select the Inactive check box to inactivate a contingent worker type.

   Note: When a contingent worker type is no longer valid, you can inactivate it, but you can't delete it.
6. Review the Current Position Usage and total Usage Count for each contingent worker type. The Current Position Usage only includes current, filled positions.

Result

You can apply contingent worker types to workers in the Contract Contingent Worker task and other contingent worker staffing tasks.

Related Information
Tasks
Steps: Set Up Basic Staffing Information on page 525
Contract Contingent Workers on page 723

Create Company Insider Types

Prerequisites

Security: *Set Up: Job* domain in the Jobs & Positions functional area.

Context

Some trading regulations require you to identify insiders within your organization who know sensitive nonpublic information. You can create and track different company insider types and assign them to job profiles. You can view details about your company insider types and inactivate types you no longer use.

Steps

1. Access the Maintain Company Insider Types task.
2. For each insider type, specify a Company Insider Type Name and Company Insider Type Description.

   To configure company insider types to different countries on the same job profile, specify the country in which they're valid in the name. Example: Include France in the name of a company insider type that's valid in France.

   Note: When a company insider type is no longer valid, you can inactivate the insider type, but you can't delete it.

Result

The Company Insider Types report displays the Used by Current Positions and the Company Insider Type in Use for each company insider type.

Example

Company Insider Type Name	Company Insider Type Description
United States: 10% Owner	10% Owner
France: 10% Owner	10% Owner
United States - Officer Insider	Officer Insider

Next Steps

Associate a company insider type with a job profile. When you staff a job or position based on a job profile, the assigned company insider type defaults to the employee.

You can override the default value during a hire, transfer, or other staffing event.

Related Information
Tasks
Steps: Set Up Basic Staffing Information on page 525
Create Job Profiles on page 573

Create Work Shifts

Prerequisites

Security: *Set Up: Work Shifts* domain in the Jobs & Positions functional area.

Context

Workday refers to an employee's assigned work shift to determine the number of work days to use in the proration factor. When you don't assign a work shift, Workday uses Monday through Friday as work days.

You can create location-specific work shifts to associate with jobs and positions.

Steps

1. Access the Maintain Work Shifts task.
2. Select a Country or Country Region.
3. For each work shift, specify a Work Shift Name and Work Shift Description.

   Note: When a work shift is no longer valid, you can inactivate it, but you can't delete it.

Example

Work Shift Name	Work Shift Description
Day Shift	8:00 am to 5:00 pm
Night Shift	11:00 pm to 7:00 am
Swing Shift	4:00 pm to 12:00 am
Weekend Shift	Saturday and Sunday

Next Steps

You can associate a work shift with a position based on a job profile. Enable Work Shift for a country on the Maintain Localization Settings task and select the Work Shift Required check box on the job profile. Then select a work shift available for the primary location of the position using the Edit Position task.

Related Information

Tasks

Steps: Set Up Basic Staffing Information on page 525

Create Job Profiles on page 573

Maintain Localization Settings on page 144

Examples

Example Steps: Assign a Work Shift to a Position on page 555

Set Up Work Hours Profiles

Prerequisites

- Enable work hours profiles in the Edit Tenant Setup – HCM task.
- Security: *Set Up: Work Hours Profiles* domain in the Jobs & Positions functional area.

Context

The work hours profile specifies the time profile and regular paid hours equivalent for 1 or more job profiles. Use work hours profiles to handle workers whose work week comprises a different number of hours than specified by the time profile for the location.

- Workday can use the regular paid equivalent hours in a work hours profile to calculate estimated annual pay (annualization).
- The regular paid equivalent hours are associated with a time profile. The full-time equivalent (FTE) is 100%, even though the number of hours is different. This affects the calculation of PTO accrual, for example.
- If you have an integration with ADP PCPW, you can have a classification for each work hours profile and exchange it with ADP.

Steps

1. Access the Maintain Work Hours Profiles task.
2. In the Work Hours Profile field, specify a name for this profile.
3. Select a Time Profile for the location where you use this work hours profile.
4. Specify the Regular Paid Equivalent Hours that these employees typically work.
   Normalize this value for overtime. Example: If the typical work week is 44 hours, enter 44. If workers get time-and-a-half for hours over 40, enter 46 to normalize the value so it represents the equivalent hours in straight time. This enables Workday to calculate annualized compensation.
5. If you have an integration with ADP PCPW, enter a Classification for this profile. Otherwise, Workday ignores this field.
6. If this work hours profile applies to all job profiles not associated with a Time Profile, select the Default for Job Profiles check box.
   When this check box is selected, you can have only 1 work hours profile for a given Time Profile. The Job Profile field becomes unavailable.
7. Select 1 or more Job Profiles for which employees normally work the hours specified in the Regular Paid Equivalent Hours field.
   You can't select a job profile that is in another work hours profile with the same Time Profile.

Example

Paramedics normally work a 44-hour week at locations where the normal time profile is 40 hours and also 35 hours (such as in France). You decide that a paramedic's 44-hour week is the equivalent of a standard work week for the location.

Create a work hours profile for:

- The Paramedic job profile at locations where the Time Profile is 40 hours.
- The Paramedic job profile at locations where the Time Profile is 35 hours.

In addition, select the Default for Job Profiles check box for:

- All other workers who work a normal week at a 40-hour location.
- All other workers who work a normal week at a 35-hour location.

Next Steps

Enable Workday to calculate annualized compensation for hourly workers with work hours profiles:

- Access the Maintain Frequencies task:
  - For the Hourly Frequency Name, select the Use Weekly Hours check box.
  - For the Weekly Frequency Name, select *Weekly* at the Frequency Type prompt.
- Set up hourly workers' compensation as follows:
  - They must have an hourly compensation plan.
  - Their compensation package must have a grade with an annual frequency.

Whenever you hire an employee, specify the work hours profile that equates to the correct regular paid equivalent hours with the time profile from the worker's location.

Whenever an employee changes jobs or locations, adjust their work hours profile accordingly.

Related Information

Tasks

Steps: Set Up Basic Staffing Information on page 525

Create Frequencies on page 979

Create Hourly Plans on page 1077

Reference

Reference: Edit Tenant Setup - HCM

Steps: Set Up Defaults for Service Dates

Prerequisites

Configure the *Service Dates Change* business process and security policy in the Staffing functional area.

Add the *Service Dates Change* business process as a subprocess of a Staffing business process.

Context

You can default service dates when the *Service Dates Change* business process is a subprocess of a Staffing business process such as *Change Job* or *Hire*.

Steps

1. Access the Create Service Date Defaults Condition Rule task.

   Security: *Set Up: Staffing* domain in the Staffing functional area.

2. Create a set of condition rules that you can use to determine when to populate a specific service date.

   You can use these fields in your condition rules:

   - *Employee Was Contingent Worker*
   - *Is Employee Rehired As Contingent Worker*
   - *Worker Termination Date*

   Example: You create a condition rule to identify workers who you rehired within 30 days of their termination date. You want to use the *Original Hire Date* to populate the *Benefits Service Date* for those workers.
3. (Optional) Create condition rules to avoid overriding existing service dates.

   To avoid overriding existing service date values, add the service date is blank report fields as conditions for your rules:

   - *Benefits Service Date is Blank*
   - *Company Service Date is Blank*
   - *Continuous Service Date is Blank*
   - *Date Entered Workforce is Blank*
   - *Expected Retirement Date is Blank*
   - *Original Hire Date is Blank*
   - *Retirement Eligibility Date is Blank*
   - *Seniority Date is Blank*
   - *Severance Date is Blank*
   - *Time Off Service Date is Blank*
   - *Vesting Date is Blank*

   Example: You manually enter a Benefits Service Date when hiring a worker. To avoid overriding that value, you add the *Benefits Service Date is Blank* report field to the condition rule.
4. (Optional) Create Calculated Fields.

   Create custom fields to use in staffing field defaults. Select one of these business objects:

   - Action Event
   - Event
   - Worker Business Process
5. Access the Maintain Staffing Field Defaults task.
6. Select the Service Dates Change tab.
7. Associate 1 or more condition rules for specific staffing fields in the business process and define the value that populates that field.

   As you complete this task, consider:

   - Defaults only apply when *Service Dates Change* is a subprocess of a staffing business process.
   - Workday processes rules in the order they display in the grid. Once a field meets the conditions for a rule, Workday ignores any remaining rules for that field.
   - To ensure that a field always populates, create a row at the bottom of the grid where:
     - The Condition Rule field is blank.
     - The Value field has a value.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
8. (Optional) Default the *Worker Hire Date* for worker service dates.

   Add the *Worker Hire Date* report field to the Report Field.

9. (Optional) Configure defaults to populate service dates from the previous job for a worker.

   Select these fields in the Report Field:

   - *Benefits Service Date – Previous Job*
   - *Company Service Date – Previous Job*
   - *Continuous Service Date – Previous Job*
   - *Date Entered Workforce - Previous Job*
   - *Expected Retirement Date – Previous Job*
   - *Hire Date – Previous Job*
   - *Original Hire Date – Previous Job*
   - *Retirement Date – Previous Job*
   - *Retirement Eligibility Date – Previous Job*
   - *Seniority Date – Previous Job*
   - *Severance Date – Previous Job*
   - *Time Off Service Date – Previous Job*
   - *Union Seniority Date – Previous Job*
   - *Vesting Date – Previous Job*
10. (Optional) Configure calculated fields in the Report Field.

    Note: You can't use calculated fields that contain sensitive data. Example: *Date of Birth*.

Result

When you complete the staffing business process, Workday applies the rules you created to populate the service date fields in the staffing event. When the event has autocomplete enabled on the business process definition, Workday attempts to complete the event automatically with the information in the populated fields.

Example

You hire a worker in the USA who has a default value for the Benefits Service Date field. You want to populate the Benefits Service Date automatically with the hire date for the worker.

1. Configure *Service Dates Change* as a subprocess of *Hire*.
2. Access the Create Staffing Field Defaults Condition Rule task and create a condition rule named *Hire in USA with Default Value*

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value	)
And		*Part of another business process of Type*	In the selection list	Value specified in this filter	*Hire*	
And		*Benefits Service Date is Blank*	Equal to	Value Specified in this filter	Yes	
And		*Country of Location Proposed*	Equal to	Value Specified in this filter	Yes	

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value	)
		is United States				

3. On the Maintain Staffing Field Defaults task, access the Service Dates Change tab.
4. Select the Add button.
5. Select *Benefits Service Date* as the Field.
6. Configure the *Hire in the USA with Default Value* condition rule.

   Select *Worker Hire Date* as the Report Field.

Next Steps

- You can view the service dates change event on the Worker History tab on the Job page of the Worker Profile.
- Correcting the parent event, such as *Hire* or *Change Job* business process events, won't automatically update the service dates. If you want to correct the service dates, you can access the Correct action as a related action for the *Service Dates Change* business process event when you have access to the Correct action on the Edit Business Process Security Policy task for the *Service Dates Change* business process.

Related Information

Reference

2023R1 What's New Post: Configurable Service Date Defaulting

Steps: Set Up Custom Staffing Fields

Prerequisites

Security:

- *Set Up: Position* domain in the Jobs & Positions functional area.
- *Worker Data: All Positions* in the Staffing functional area.

Context

You can configure these fields to add additional details to your filled and unfilled positions:

- Annuitant Indicator
- Appointment Type
- Cybersecurity Area
- Employment System
- Employee Tenures
- Functional Class
- PMIAA Code
- Retirement Special Population
- Security Clearance Level
- Sensitivity and Risk
- Time Type Subtypes

Note: Usage is limited to Position Management organizations. Fields will not be available for Job Management organizations.

This functionality supports US Federal agency requirements for classifying positions, and Personnel Action Request (PAR) processing. You can also use these fields for organizations that aren't related to US Federal by configuring custom field values.

Steps

1. Access these tasks to setup values for the staffing fields:
    - Maintain Annuitant Indicators
    - Maintain Appointment Types
    - Maintain Cybersecurity Areas
    - Maintain Employment Systems
    - Maintain Employee Tenures
    - Maintain Functional Classes
    - Maintain PMIAA Code
    - Maintain Retirement Special Populations
    - Maintain Security Clearance Levels
    - Maintain Sensitivity and Risks
    - Maintain Time Type Subtypes

    Note: Maintain Functional Classes and Maintain PMIAA Code have effective dating capabilities.

    You can setup values for US Federal use cases, including Personnel Action Request (PAR) processing. You can also setup values for your nonfederal staffing use cases.
2. Access the Configure Optional Fields task.
3. Select the relevant business process in the By Functional Area field. Unhide the fields and make them required, optional, or view only on these business processes:

Business Process	Field
• *Add Job* • *Change Job* • *Contract Contingent Worker* • *Edit Position* • *Hire* • *Start International Assignment*	• Annuitant Indicator • Appointment Type • Cybersecurity Area • Employee Tenure • Employment System • Functional Class • PMIAA Code • Retirement Special Population • Security Clearance Level • Sensitivity and Risk • Time Type Subtype
• *Create Position* • *Edit Position Restriction*	• Cybersecurity Area • Employment System • Functional Class • PMIAA Code • Retirement Special Population • Security Clearance Level • Sensitivity and Risk • Time Type Subtype

4. (Optional) Access the Maintain Custom Labels task.

    Rename the fields names based on your organizational needs.

Result

Your fields display on the business processes you configured.

Related Information

Reference

Steps: Configure the Personnel Action Request Business Process

Change Worker Service Dates

Prerequisites

Configure the *Service Dates Change* business process and security policy in the Staffing functional area.

Context

Manage the various service milestone dates for workers. You can tailor your use of these dates to meet your needs.

You can select the Enable Autocomplete check box on the *Service Dates Change* business process definition. Once enabled, Workday automatically completes the change event for the service date.

You can rename service date fields in the *Staffing* context using the Maintain Custom Labels task. Workday suggests that you work with your HR specialist to ensure that you aren't changing the field meaning.

Many of these dates automatically populate from the Hire Employee or Contract Contingent Worker tasks. Changes to some of the dates can impact other areas within Workday, such as Benefits, Compensation, and Absence. Whether they determine eligibility for benefits depends on how you configure your benefit and other eligibility rules.

We recommend that you use v43.0 of the *Edit Service Dates* web service to specify effective dates if you've opted in to *Effective Dating for Service Dates* feature.

You can default service dates when the *Service Dates Change* business process is a subprocess of a Staffing business process. Configure defaulting rules for *Service Dates Change* using the Maintain Staffing Field Defaults task.

Because workers can have multiple jobs, you can find dates relating to:

- Length of time in a position.
- End of employment on the position.

These scenarios can affect service dates:

- First hire or rehire. With or without the Edit Service Dates task as a subprocess, or when making a hire date correction.
- Accessing the Edit Service Dates task: As a stand-alone or as a subprocess on any business process other than *Hire*.
- Termination.

Steps

1. Access the Edit Service Dates task.
2. As you complete this task, consider:

Date	Description
Effective Date	Enter the date that the service date changes are effective for the worker. This field displays when you opt in to *Effective Dating for Service Dates* on the Maintain Feature

Date	Description
	Opt-Ins task. You can't opt out after you opt in. Existing service date events you created prior to opting in to the feature are not effective dated. When you add the *Service Dates Change* business process as a subprocess of a staffing business process, Workday defaults the date with the effective date of the parent event. The defaulted effective date is read-only and isn't editable.
Hire Date or Contract Start Date	Automatically populates from the most recent *Hire* or *Contract Contingent Worker* business processes.
Original Hire Date	Enables you to track when the organization first employed a worker. Used for COBRA eligibility and Form I-9 for US Payroll, and also for the Length of Service in Months from Original Hire Date report field. Automatically populates from the earliest Hire Date. However, when you manually edit the Original Hire Date, automatic population no longer occurs. To ensure that the date once again populates automatically, you can: • Enter a new earliest Hire Date that is before the current Original Hire Date. • Manually edit the Original Hire Date to match the earliest Hire Date. • Rehire the worker. This service date only applies to employees.
Continuous Service Date	Enables you to give credit for past employment. Used in benefit elections, compensation period basis behavior, and length of service calculations. Automatically populates from the most recent Hire Date. However, after you manually edit the Continuous Service Date to a different date, it no longer automatically populates. To restore automatic population, you can either: • Manually edit the Continuous Service Date to match the Hire Date. • Rehire the worker. When the Continuous Service Date and Hire Date are the same, correcting the Hire Date automatically corrects the Continuous Service Date. However, when the 2 dates are different, correcting the Hire Date doesn't affect the Continuous Service Date. You can't manually

Date	Description
	update the Continuous Service Date field on a *Hire* business process correction.
Length of Service	Automatically calculated from the Continuous Service Date to the current date or termination date. If a worker has a future rehire date, this field calculates from the Continuous Service Date to their termination date. This field doesn't calculate based on their future rehire date. When you rehire a worker, their length of service includes the time that you didn't actively employ them. Use the Service Length Type field in the Edit Tenant Setup - HCM task to specify the display format.
Date Entered Workforce	Supports statutory leave entitlements. Use the Edit Tenant Setup - Global task to track for workers in specific countries. This service date only applies to employees.
Days Unemployed	Used only for China. Impacts statutory leave eligibility. This service date only applies to employees.
Months Continuous Prior Employment	Used only for China. Impacts statutory leave eligibility. This service date only applies to employees.
Benefits Service Date	Enables you to track length of service for benefit programs. Example: Workers become eligible for insurance after a 3-month probation period. Available for use in user-defined calculations and eligibility rules. Workday empties the field during rehire. This service date only applies to employees.
Company Service Date	Enables you to track an additional service date, such as date of acquisition. Available for use in user-defined calculations and eligibility rules. Workday empties the field during rehire. This service date only applies to employees.
Time Off Service Date	Enables you to track time off eligibility based on a different service date. Example: Standard time off is 3 weeks per year, but some workers negotiate 4 weeks.

Date	Description
	Available for use in user-defined calculations and eligibility rules.
Retirement Eligibility Date	Enables you to track eligibility for retirement, such as when eligibility is based on length of service or age. Available for use in user-defined calculations and eligibility rules. This service date only applies to employees.
Expected Retirement Date	Enables you to report on retirement for workers who announce their retirement date in advance. Available for use in user-defined calculations and eligibility rules. This service date only applies to employees.
Seniority Date	Enables you to track seniority based on a date other than Hire Date or Company Service Date. Used in the Length of Service in Months from Seniority Date report field. Available for use in user-defined calculations and eligibility rules. Automatically populates from the earliest Hire Date. However, when you manually edit this field on the task, this automatic population no longer occurs until you rehire the worker. This service date only applies to employees.
Severance Date	Enables you to track how long a worker receives severance pay. Also used in compensation period basis behavior. Available for use in user-defined calculations and eligibility rules. This service date only applies to employees.
Vesting Date	Enables you to track when a worker is fully vested, when this differs from standard vesting rules. This service date only applies to employees.
Service Dates Change History	Displays a report of all service date changes for the worker.

Result

You can view service dates on worker profiles and in the View Service Dates report. You can use the View As Of field in the report to view service date changes in effect for a worker as of a specific date.

Next Steps

You can correct the *Service Dates Change* business process event from the related actions menu on the event.

If you opted in to the *Effective Date for Service Dates* feature on the Maintain Feature Opt-Ins task:

- You can't opt out after you opt in.
- Existing service date events you created prior to opting in to the feature are not effective dated. The Effective Date field on those events uses the date the event was initiated. You can update the Effective Date when you correct the event.
-
- You can correct the effective date on standalone *Service Dates Change* business process events.
  - Set up the security for the *Correct* action on the *Service Dates Change* business process using the Edit Business Process Security Policy.
  - Enter an Effective Date that doesn't conflict with any existing staffing events. Example: You have a service date event that's effective 2024-05-30, and a Change Job event effective 2024-03-30. You want to correct the service date event to 2024-02-27. You need to resolve the date of the Change Job event before you can correct the service date event.
- If you rescind an existing service date event that you created without an Effective Date, the worker's current service dates won't change. After you rescind an existing service date event, Workday recommends that you either:
  - Edit the service dates using the Edit Service Dates task.
  - Correct the previous service date event.
- You can see a Service Dates Change History table when you view, edit, or correct service dates. Existing service date events you created prior to opting in to the feature won't display an Effective Date.
- You can create a custom report using the Effective Date for Service Dates report field. The report field returns the effective date for service date events created or corrected after you opted in to the feature, and returns blank for non-effective dated events.

Related Information

Concepts

Concept: Termination Dates for DSN Reporting (FRA)

Concept: Workday Docs

Tasks

Hire Employees on page 690

Contract Contingent Workers on page 723

Steps: Set Up Workday Docs

Change Creditable Service

Prerequisites

Configure the *Creditable Service Change* business process in the Staffing functional area.

Security: These domains in the Staffing functional area:

- Self Service: Creditable Service
- Set Up: Creditable Service Types
- Worker Data: Creditable Service

Context

You can collect, store, and view an employee's prior work history that can be used for absence, benefits, and retirement eligibility calculations.

You can add the *Creditable Service Change* business process as a subprocess of the *Hire* business process.

Steps

1. Access the Maintain Creditable Service Types task to configure service types.
2. Access the Edit Creditable Service task.

   Enter the length of service in the years, months, and days.
3. Access these reports to view creditable service for employees and different types of creditable service:
   - View Creditable Service for Employee
   - View Creditable Service Types
   - View My Creditable Service
4. (Optional) Maintain Custom Labels task.

   Select the Staffing term context. Override the Creditable Service term with one that is better suited to your organization.

Related Information
Reference
2023R2 What's New Post: Creditable Service

Setup Considerations: Working Time Rules

You can use this topic to help make decisions when planning your configuration and use of working time rules. 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

Working time rules enable you to populate default and scheduled weekly hours for workers.

Business Benefits

You can increase efficiency and reduce manual effort by:

- Creating rules to populate default and scheduled weekly hours for workers.
- Ensuring the correct assignment of full-time equivalent (FTE) percentages to workers.
- Assigning different default and scheduled weekly hours for workers based on job profile, time type, location, and more.

Use Cases

- Record and report working time of a worker.
- Automatically update weekly hours by eligibility rules when workers change job. Example: When changing a full-time worker to part-time.
- Track working time for specific countries.

Questions to Consider

Questions	Considerations
How do you want to populate scheduled and default weekly hours for workers?	You can use working time rules to populate scheduled and default weekly hours for workers. You can assign different default and scheduled weekly hours for workers based on: • Collective agreements • Company • Cost center • Job category • Job family • Job profile • Location • Supervisory organization • Time type • Work shift
How do you want to populate scheduled and default weekly hours for workers if there are no working time rules?	In *Create Position*: You can populate scheduled and default weekly hours from the Location Weekly Hours field. In *Edit Position Restrictions*: You can populate scheduled and default weekly hours from: • Position restrictions. • The Location Weekly Hours field. In all other supported business processes, you can populate scheduled and default weekly hours from: • Job requisition or position restrictions. • The Location Weekly Hours field. • The work hours profile. When you initiate a change job event from a job requisition, Workday populates the Default Weekly Hours and Scheduled Weekly Hours fields from the location weekly hours of the job requisition's primary location, when: • The FTE of the current job is 100%. • There's no work hours profile.
How can you make Workday apply working time rules on supported business processes?	Workday applies a working time rule, if you: • Define a working time eligibility rule. • Enter data on a task that matches the working time eligibility rule. Example: Workday populates rule data based on a previous process when you initiate a task. To apply a rule, enter data that matches the rule. Workday respects the defaulting behavior of weekly hours on initiation, revise, and review tasks of all the related business processes.

Questions	Considerations
How can you populate weekly hours values in web services?	You can populate weekly hours values in the recruiting and staffing web services from a rule if applicable.
How do you want to populate weekly hours in mass action workbooks?	You can populate scheduled and default weekly hours in these workbooks based on the eligibility of rules: • Mass action: Mass Change Job. • My Tasks consolidation: Mass Employment Agreement and Mass Offer.
How can you populate scheduled and default weekly hours for pre-hires and candidates?	Using *Offer* and *Employment Agreement* as a subprocess of *Job Application* you can populate weekly hours for pre-hires and candidates from a working time rule. You can also use *Employment Agreement* as a standalone business process to populate the weekly hours for pre-hires and candidates from a working time rule. You can also configure Workday to populate scheduled and default weekly hours automatically for workers in the job and evergreen requisition business processes using condition rules.
How can you ensure correct assignment of weekly hours and full-time equivalent percentages?	You can configure the editable working time fields like Default Weekly Hours and Scheduled Weekly Hours to be non enterable for certain security groups using the Configure Optional Fields task. Restricting the fields for certain security groups will avoid any incorrect entry of weekly hours values and ensures correct full-time equivalent percentages for workers.

Recommendations

If you want to define a working time rule based on collective agreements:

- Assign a collective agreement to a worker before you define a rule.
- Use *Employment Agreement* instead of *Hire*.

Requirements

No impact.

Limitations

If you enable Work Hours Profile in the Edit Tenant Setup – HCM task, scheduled and default weekly hours won't populate from the working time rules.

Tenant Setup

Enable Enable FTE on Position Restrictions on the Edit Tenant Setup - HCM task to populate default and scheduled weekly hours in the *Edit Position Restriction* and *Create Position* business processes.

Security

Domains	Consideration
Set Up: Working Time domain in the Staffing functional area.	Users secured to this domain can set up country-specific working time.
Set Up: Tenant Setup - Global domain in the System functional area.	Users secured to this domain can restrict settings to certain countries or regions.
Manage: Cost Center domain in the Organizations and Roles functional area.	Provides access to managing all cost center structures.
Manage: Supervisory Organization domain in the Organizations and Roles functional area.	Provides access to viewing and maintaining supervisory organizations to which the user has access.
Public Reporting Items domain in the Tenant Non-Configurable functional area.	Provides access to all publicly available report fields and report data sources. It allows all users with permissions to create or run reports to view these fields.
Worker Data: Collective Agreements in the Staffing functional area.	Provides access to collective agreement data for employees.
Worker Data: Current Staffing Information domain in the Staffing functional area.	Provides information on workers' current information such as status, length of service, seniority. Includes web services.
Worker Data: Work Shifts domain in the Staffing functional area.	Provides access to information regarding workers' work shifts.

Business Processes

Workday populates scheduled and default weekly hours from a working time rule on these business processes:

- *Add Additional Job*
- *Change Job*
- *Contract Contingent Worker*
- *Create Position*
- *Edit Position*
- *Edit Position Restriction*
- *Employment Agreement*
- *Hire*
- *Offer*
- *Start International Assignment*

Reporting

Reports	Considerations
View Working Time Eligibility Rule	Displays the eligibility rules that you create for working time.
View Working Time for Country	Displays the working time rules defined for a country.

Integrations

You can use these web services to upload working time configuration and eligibility rules:

- *Put Working Time Eligibility Rules*
- *Put Maintain Working Time for Country*

You can use these web services to retrieve working time configuration and eligibility rules:

- *Get Working Time Eligibility Rules*
- *Get Maintain Working Time for Country*

Connections and Touchpoint

Feature	Considerations
Recruiting	You can populate scheduled and default weekly hours for pre-hires and candidates using working time rules on *Employment*, *Offer*, and *Job Requisition*.

Related Information

Tasks

Set Up Work Hours Profiles on page 535

Reference

2022R2 What's New Post: Working Time

Steps: Set Up Working Time Localized Fields

Context

You can record details about a worker's expected schedule on these business processes:

- *Add Additional Job*
- *Change Job*
- *Contract Contingent Worker*
- *Create Position*
- *Edit Position*
- *Edit Position Restrictions*
- *Employment Agreement*
- *Hire*
- *Offer*
- *Start International Assignment*

These working time fields display for a job or position in a country that you set up to track working time:

- Frequency
- Unit
- Value
- Paid FTE %
- Working FTE %
- Work Shift

You can access the Create Allowance Plans or Edit Allowance Plans tasks to set up working time tracking, time rules, or compensation components and grades.

Steps

1. Access the Maintain Localization Settings task.

Option	Description
Area	Select *Staffing*.
Working Time (Frequency, Time Unit, and Time Value)	Select the countries that track working time (frequency, time unit, and time value) for workers.
Paid FTE	Select the countries that track paid full-time equivalent for workers.
Working FTE	Select the countries that track working full-time equivalent for workers.
Work Shift	Select the countries that track work shift information for a worker.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.
2. Access the Maintain Frequencies task.

   Set up frequency types for your selection list.

   Security: *Set Up: Compensation General* domain in the Core Compensation functional area.

Steps: Set Up Working Time Rules

Prerequisites

Security: Configure these domains in the Staffing functional area:

- *Set Up: Working Time*
- *Set Up: Staffing*

Context

You can set up working time rules to:

- Populate default and scheduled weekly hours for workers based on rules.
- Ensure correct assignment of FTE to workers.
- Assign different default and scheduled weekly hours for workers based on:
  - Job profile
  - Job family
  - Job category
  - Collective agreements
  - Company
  - Cost center
  - Supervisory organization
  - Location
  - Time type
  - Work shift

Steps

1. Access the Maintain Working Time for country task.
2. Select *Create Working Time Eligibility Rule* from the Working Time Eligibility Rule prompt.

3. Create an eligibility rule for the working time rule.
4. As you complete the Maintain Working Time for country task, consider:

Option	Description
Default Weekly Hours	Enter the default weekly hours associated with the working time rule.
Scheduled Weekly Hours	Enter the scheduled weekly hours associated with the working time rule. If you don't specify a value, the scheduled weekly hour for a worker will be zero even if the worker is eligible for a working time rule.

Result

When you add default and scheduled weekly hours for a worker, based on the eligibility of the rule Workday populates the weekly hours values.

Example

You can create a working time rule to populate 40 default weekly hours and 20 scheduled weekly hours in the WorkingTime section for a part-time consultant in France.

Related Information

Reference

2022R2 What's New Post: Working Time

Concept: Working Time

Overview

You can use the Working Time section in staffing tasks to record details about a worker's working time and full-time equivalent percentile. You can use the full-time equivalent percentile to calculate compensation and to support workforce planning and reporting.

Workday displays these fields for a job or position so that you can track working time:

Field	Description
Location Weekly Hours	The standard weekly hours associated with the location.
Scheduled Weekly Hours	Populates from an eligibility rule when: • You've defined a working time rule. • The data populated on staffing tasks apply the rule. Populates from Default Weekly Hours when there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position.

Field	Description
	For change job events associated with job requisitions, when there's no working time rule and work hours profile: • Populates from the Default Weekly Hours when the full-time equivalent (FTE) of the current job is 100%. • Remains same as the current job when the FTE of the current job isn't 100%.
Default Weekly Hours	Populates from a rule when: • You've defined a working time rule. • The data populated on the task applies the rule. Populates from Location Weekly Hours when there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position. For change job events associated with job requisitions, when there's no working time rule and work hours profile: • Populates from the location weekly hours of the job requisition’s primary location when the FTE of the current job is 100%. • Remains same as the current job when the FTE of the current job isn't 100%.
FTE	The full-time equivalent percentage of a worker.
Specify a Paid FTE	Available when you enable Paid FTE on the Maintain Localization Settings task.
Paid FTE %	Available when you enable Paid FTE on the Maintain Localization Settings task.
Specify a Working FTE	Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Working FTE %	Working full-time equivalent of workers. Used in custom reporting. Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Work Shift	Available when you enable Work Shift on the Maintain Localization Settings task. Available when you select the Work Shift Required check box on the job profile.

Field	Description
	Define the work shifts for a location using the Maintain Work Shifts task.
Frequency	Select from the working time frequencies you specified on the Maintain Frequencies task. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Unit	Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Value	Enter the duration of the time unit for the corresponding frequency. Automatically populates to zero. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.

Working Time Rules

We enable you to configure country-specific eligibility rules for working time. Working time rules enable you to populate scheduled and default weekly hours for workers automatically, providing a more efficient way to assign full-time equivalent (FTE) percentages to workers.

Example: You can automatically update weekly hours based on eligibility rules when changing a full-time worker to part-time.

Note: The Work Hours Profile settings in the Edit Tenant Setup – HCM task take precedence over the rules.

Related Information
Reference
2022R2 What's New Post: Working Time

Create Pay Rate Types

Prerequisites

Security: *Set Up: Job* domain in the Jobs & Positions functional area.

Context

You can assign country-specific pay rate types to a job profile.

Steps

1. Access the Create Pay Rate Type task.
2. For each pay rate type, specify a Pay Type Name and select a Target Frequency.

Example

Pay Type Name	Target Frequency
Hourly	Hourly

Pay Type Name	Target Frequency
Salary	Semi-Monthly

Next Steps

- Associate a country-specific pay rate type with a job profile. When you staff a job or position based on a job profile, the pay rate automatically assigns to the employee. If a job profile has more than 1 pay rate type, Workday determines the country-specific classifications to apply to the employee. In this scenario, assignment is based on the primary business address and country associated with the job or position location.
- To update pay rate types, use the Edit Pay Rate Type task.
- To update pay rate types from a worker profile, access the Job Details section of the profile Summary and from the related actions menu of the Position, select Position > Edit Position > Job Details > Pay Rate Type.
- To inactivate pay rate types that you don't want to continue using, use the Inactive check box on the View Pay Rate Type report or the Create Pay Rate Type and Edit Pay Rate Type tasks.
- To delete pay rate types that aren't in use, use the Delete Pay Rate Type task.

Related Information

Tasks

Steps: Set Up Basic Staffing Information on page 525

Create Job Profiles on page 573

Example Steps: Assign a Work Shift to a Position

This example illustrates how to assign a work shift to an employee's position based on their job profile and location. You can use this configuration to assign a work shift to a position in any staffing business process.

Context

You want to assign a day shift to a Marketing Coordinator in Paris. The marketing coordinator position is based on the Marketing and Communications Coordinator job profile.

Prerequisites

- Create a Day Shift work shift for France.

Steps

1. Access the Maintain Localization Settings task.
    a) Select *Staffing* from the Area prompt.
    b) Click OK.
    c) For the Work Shift localized field, select *France* from the Allow for Countries or Regions prompt, and select the Active check box.
    d) Click OK and Done.

    Security: *Set Up: Tenant Setup - Global* in the System functional area.
2. Access the Edit Job Profile task.
    a) Select an effective date.
    b) Select *Marketing & Communications Coordinator* from the Job Profile prompt.
    c) Select the Work Shift Required check box.
    d) Click OK and Done.

    Security: *Set Up: Job* domain in the Jobs & Positions functional area.

3. Access the Edit Position task.
    a) Select *Marketing Coordinator* from the Position prompt.
    b) Select *Paris* from the Location prompt.
    c) Select *Day Shift* from the Work Shift prompt.
    d) Click Submit.

   Security: *Set Up: Position* domain in the Jobs & Positions functional area.

Next Steps

Access the Maintain Days Worked by Work Shift task to assign days to shifts when you want to prorate by days worked.

Reference: Search Prefixes for Staffing

You can use prefixes in Workday Search to locate particular staffing objects quickly. Search prefixes are lowercase letters, followed by a colon (:). You can use the search categories to narrow down your search results.

Object	Prefix	Example
Contingent Worker	worker:	Search using the contingent worker's name, ID, or email address: • worker: Adam Shreeve • worker: 26712 • worker: ashreeve@gms.com
Employee	worker:	Search using the employee's name, ID, or email address: • worker: Adam Shreeve • worker: 25698 • worker: ashreeve@gms.com
Job Family	jobfamily:	Search using the job family name: • jobfamily: administration
Job Profile	job:	Search using the job profile name or job code: • job: consultant • job: 45100
Location	loc:	Search using the location name: • loc: Chicago
Pre-Hire	• applicant: • ph:	Search using the applicant or pre-hire's name, ID, source name, email address, or phone number: • applicant: Adam Shreeve • applicant: A07193 • applicant: LinkedIn

Object	Prefix	Example
		• applicant: ashreeve@gms.com • applicant: 8001234567 Workday also supports searching for a secondary last name. Example: You have an applicant or pre-hire named David Cook-Smith. When you search using ph: David Smith, Workday displays David Cook-Smith.
Position or Position Restriction	position:	Search using the position, position ID, position restriction ID, location name, job posting title, job profile name, position title, worker name, or username: • position: P-10613 Staff Workforce Analyst - Adam Shreeve • position: P-10613 • position: Staff Workforce Analyst • position: Chicago • position: Adam Shreeve • position: ashreeve When you search for a position using the worker's name, Workday supports searching by current legal and preferred name if you have access to the *Search: Current Legal and All Historical Names* domain. You can search for positions or position restrictions in prompts using the: • Contingent worker ID. • Employee ID. You can't search for: • Closed positions. • Positions using a worker's historical preferred or legal name.

Related Information

Reference

2021R1 What's New Post: Search for Positions, Pre-Hires, and Position Restrictions

Job Catalog

Job Architecture Hub

Setup Considerations: Job Architecture Hub

You can use this topic to help make decisions when planning your configuration and use of Job Architecture Hub. 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

Job Architecture Hub provides users with automated insights and actionable steps that they can take to build and maintain a high-quality job architecture that supports their business.

Business Benefits

With Job Architecture Hub, you can enable users to:

- Access a centralized and customizable place to manage your job architecture data.
- Report on job profiles, including any impacts on inactivating or updating a job.
- Identify data gaps and inconsistencies in your job architecture.
- Leverage machine learning suggestions and insights, reducing time spent on analyzing your job architecture.
- View skills-based operational analytics that allows them to compare the supply and demand of skills in their organization, and compare their skills demand to the market.

Use Cases

- Use machine learning to help you identify similar job profiles by scanning across your architecture to highlight jobs that you could consolidate, or adjust for consistency.
- Use automated insights and suggestions to take action on job profiles with data gaps, without workers, and that are out of date.
- View the status of in-progress job profile events.
- Improve data quality for use cases where the data is defaulted and used in machine learning, such as Career Hub and Recruiting.
- Understand the skills supply and demand in your organization.
- Compare your skills in demand against the skills in demand at other companies.

Questions to Consider

Questions	Considerations
What users do I want to access the hub?	You can give users access to all or part of the Job Architecture Hub, based on their roles. Workday recommends that you provide complete access to all pages and sections of the hub to users who manage your job architecture. For most

Questions	Considerations
	organizations, this is a small team that includes HR Partners and Compensation Partners. Workday recommends that you provide partial access to users who benefit from specific insights. Example: You provide your Talent Partners access to the Overview page, and these pages in the Skills Analytics section: Workday Market Skills, Supply and Demand. You don't give them access to the Job Profile Analysis and Job Profile Reports sections. See *Reference: Job Architecture Hub*.
Can I customize the Job Architecture Hub?	Yes. You can customize the Job Architecture Hub, such as by: • Customizing the delivered standard reports. • Renaming the hub, and sections. • Hiding sections, navigation items, and cards. • Including navigation items to custom reports, custom dashboards and Extend Apps. • Adding announcements to sections. • Adding suggested links, such as to your existing custom job architecture reports. • Update your custom reports to return job profiles that meet the filter criteria on the Job Architecture Hub. See *Set Up Hubs*.

Recommendations

Enable the Find Similar and Workday Market Skills pages to view machine-learning driven insights on your job profiles.

Workday recommends you customize the hub to fit your organization's needs.

Requirements

Configure the *Manage: Job Architecture Hub* domain in the Jobs & Positions functional area.

The individual security permissions of users determines what data they can view, and which tasks, reports and cards they can use. Consider the other domains that you want to enable as part of your Job Architecture Hub setup. See *Reference: Job Architecture Hub*.

Limitations

The Workday Market Skills for Job Profiles and Find Similar Job Profiles machine learning features:

- Require customer data contributions to function.
- Update results once every week. This means significant changes to your job architecture or job profiles will take up to a week to reflect in the features.
- Can only be used in your Preview and Production tenants. Implementation tenants are not supported.

The Market Skills feature currently only supports English. Skills and insights provided will be based on English-language job profile and job requisition data, and will not be available in any other languages.

Find Similar Job Profiles only runs on active job profiles. Job Profiles flagged as inactive will not be surfaced.

Tenant Setup

No impact.

Security

Configure the Manage: Job Architecture Hub domain in the Jobs & Positions functional area to enable users to access the hub.

The individual security permissions of users determines what data they can view, and which tasks, reports and cards they can use. Consider the other domains that you want to enable as part of your Job Architecture Hub setup. See *Reference: Job Architecture Hub*.

Business Processes

Ensure that users have the relevant security permissions for the *Manage Job Profile* business process in order to be able to view or initiate it from the hub.

Reporting

No impact.

Integrations

No impact.

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.

Features	Considerations
Compensation	The Job Architecture Hub allows you to report on compensation elements for job profiles, and filter the hub by these compensation fields: • Compensation Grade • Compensation Grade Profile
Recruiting	Job profile data is defaulted and used in machine learning in Recruiting. The hub helps you improve data quality.
Talent Optimization and Career Hub	The hub helps you improve data quality for data that's defaulted and used in machine learning in Career Hub. Insights to help drive career conversations. Example: Career pathing, performance reviews. The Skills Analytics section can help Talent Partners analyze what skills are in demand for the organization, and target skills gaps.

Related Information

Examples

Workday AI Fact Sheet: Market Skills for Job Profiles

Workday AI Fact Sheet: Find Similar Job Profiles

Steps: Set Up Job Architecture Hub

Context

The Job Architecture Hub is a centralized platform that enables users to easily find job architecture related reporting, and machine learning driven insights. It consolidates various tasks and reports into a central location, streamlining administrator's ability to support their job catalog. You can use the insights you gain from the Hub to efficiently maintain a high-quality job architecture that supports your business.

Steps

1. Edit Domain Security Policies.

   Configure the *Manage: Job Architecture Hub* domain in the Jobs and Positions functional area.
2. Configure domain security policies for other tasks and reports that you want to enable in the Job Architecture Hub.

   See Reference: Job Architecture Hub on page 562.
3. Activate Pending Security Policy Changes.
4. (Optional) To use the Market Skills report, opt in to machine learning and Skills Cloud

   a. Enable Skills Cloud.
   b. On the Innovation Services And Data Selection Opt-In task, select HCM ML Features and Third Party Connectors GA on the Available Services tab in the HCM category.
   c. On the Maintain Innovation Services Data Selection Opt-In task, select the HCM ML Features and Third Party Connectors GA innovation service.
   d. Select the opt-in check box for these categories:

      - Job Requisition Data
      - Talent Profile Data

   Security: *Job Profile: Find Similar Jobs*.

   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.

   See Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.
5. (Optional) To use the Find Similar report opt in to machine learning.

   a. On the Innovation Services And Data Selection Opt-In task, select HCM ML Features and Third Party Connectors GA on the Available Services tab in the HCM category.
   b. On the Maintain Innovation Services Data Selection Opt-In task, select the HCM ML Features and Third Party Connectors GA innovation service.
   c. Select the opt-in check box for the Talent Profile Data category.

   Security: *Job Profile: Find Similar Jobs*.

   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.

   See Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   It may take up to a week to see results in your Production tenant after opting in and setting up the *Job Profile: Find Similar Jobs* domain. Results are updated weekly.

6. (Optional) Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality.

   Security: *Set Up: Tenant Setup - Machine Learning* domain in the System functional area.

Result

Users can access the Job Architecture Hub and view the tasks and reports you've enabled.

The hub uses your tenant's default time zone to return results as of today's Effective Date.

Next Steps

If needed, access the Maintain Find Similar Job Profiles task to:

- Customize the criteria for returning similar job profiles on the Find Similar Job Profiles report. Select which fields must have identical values in order to be considered similar. Example: When you select Job Level, Workday only displays job profiles with the same job level.
- Select the Opt Out of Explanation on Compare Find Similar to no longer generate an AI explanation when you Compare Similar Profiles on the Find Similar Job Profiles report.

The Workday Market Skills for Job Profiles and Find Similar Job Profiles machine learning features can only be used in your Preview and Production tenants. Implementation tenants are not supported.

Related Information

Tasks

Steps: Set Up Skills Cloud on page 1852

../../../../manage-workday/tenant-configuration/navigation/tar1424373632406.dita

Examples

Workday AI Fact Sheet: Market Skills for Job Profiles

Workday AI Fact Sheet: Find Similar Job Profiles

Reference: Job Architecture Hub

This topic lists security domains and consideration for the filters, cards, reports, and tasks displayed in the different sections of Job Architecture Hub:

- Hub Filters on page 562
- Overview on page 563
- Skills Analytics on page 564
- Job Profile Analysis on page 566
- Job Profile Reports on page 568

Hub Filters

You can filter all reports and cards on the Job Architecture Hub to only display job profiles that meet the filter criteria.

In order for users to view consistent results when filtering, make sure that your security configuration on the security domains is consistent with your security configuration for reports and cards on the Job Architecture Hub.

Filters	Security	Description
Job Family Group Job Family Job Profile Organization	*Worker Data: All Positions*	Enables you to only display job profiles with those fields.

Filters	Security	Description
Job Level Skill Job Classification Management Level		
Supervisory Organization Include Subordinate Cost Center	*Manage: Supervisory Organization* *Manage: Cost Center* *Worker Data: All Positions*	Returns job profiles that have an active position or position restriction tied to the Supervisory Organization or Cost Center.
Compensation Grade Compensation Grade Profile	*Non-Worker Data: Compensation Grade* *Set Up: Compensation Packages* *Worker Data: Compensation Grade*	These compensation related filters enable you to only display job profiles with those compensation fields. These compensation fields are contextually secured on the hub: • Compensation Grade • Compensation Grade Profile

Overview

Item	Security	Description
Job Family Groups summary card	*Manage: Job Architecture Hub*	The number of different job family groups represented in the filtered job profiles.
Job Families summary card	*Manage: Job Architecture Hub*	The number of different job families represented in the filtered job profiles.
Active Job Profiles summary card	*Manage: Job Architecture Hub*	The number of different active job profiles represented in the filtered job profiles.
Inactive Job Profiles summary card	*Manage: Job Architecture Hub*	Displays all inactive job profiles. This number isn't impacted by any filters you select for the Job Architecture Hub.
Create Job Profile button	Initiating action on the *Manage Job Profile* business process.	Launches the Create Job Profile task and initiates the *Manage Job Profile* business process.
Edit Job Profile button	Initiating action on the *Manage Job Profile* business process.	Launches the Edit Job Profile task and initiates the *Manage Job Profile* business process.
View Job Profile Audit button	*Audit: Job Architecture Hub*. Users with access to this domain can see all position and job requisition data.	Enables you to view key usages for job profiles, and determine the impact of updating or inactivating them.

Item	Security	Description
View Job Profile button	*Job Profile: View*	Enables you to view a specific job profile.
Without Workers card	*Audit: Job Architecture Hub*. Users with access to this domain can see all position and job requisition data.	Displays the number of active job profiles with no associated workers. You can click Open Page to open the Job Profiles Without Workers report in the Job Profile Analysis section.
Similar card	*Job Profile: Find Similar Jobs*	Displays sets of similar job profiles. Workday uses these data points to determine similar job profiles: • Job Profile Name • Job Profile Summary • Job Description You can click Open Page to open the Find Similar Job Profiles report in the Job Profile Analysis section. You can use the Maintain Find Similar Job Profiles task to customize the criteria for returning similar job profiles. To use this card you must opt-in to machine learning. See *Steps: Set Up Job Architecture Hub*.
Data Gaps card.	*Audit: Job Architecture Hub*. Users with access to this domain can see all position and job requisition data.	Displays job profiles with missing pay rate types, job classifications, skills, job descriptions, and job summaries. You can click Open Page to open the Job Profiles With Missing and Inconsistent Data report in the Job Profile Analysis section. Displays up to 2,000 job profiles with missing pay rate types and job classifications.

Skills Analytics

Skills Supply and Demand Analytics page:

Item	Security	Description
X% of Skills Demand Met card	*Worker Data: All Positions* *Person Data: Skills*	Compares skills demand to skills supply. Enables you to

Item	Security	Description
		quickly identify gaps between supply and demand. We calculate X based on the average ratio of skills supply divided by the skills demand. X won't go above 100%. Example: You have the Leadership and Communication skills in demand. Both have a demand of 50. Leadership has a supply of 25, and Communication has a supply of 50. On average, 75% of the skills demand is met by the skills supply.
Top Job Profile Skills in Demand	*Manage: Job Architecture Hub - Skills Analytics* *Worker Data: All Positions* The *Set Up: Skills and Experience* domain enables users to drill down into the individual Skills	Displays demand for particular skills based on positions, position restrictions, which job profiles those positions are using, and the skills explicitly defined on the job profile. The feature then aggregates the skills to determine demand for a particular skill. To aggregate the top 10 skills we use: • All position restrictions (filled and unfilled) for position management and all jobs for job management. • All associated job profiles. • Skills assigned to those job profiles Workday then aggregates the skills to derive demand. Uses skills on inactive job profiles if they're linked to an active position, position restriction, or job. See *Steps: Set Up Skills and Experience*.
Top Worker Skills in Supply	*Manage: Job Architecture Hub - Skills Analytics* *Person Data: Skills. Contextual* security is applied. The *Set Up: Skills and Experience* domain enables users to drill down into the individual Skills	Displays a list of skills with the most workers. The Top 10 skills are based on the most frequent skills on worker profiles. See *Steps: Set Up Skills and Experience*.

Workday Market Skills page. To use this page you must opt-in to machine learning. See *Steps: Set Up Job Architecture Hub*.

Item	Security	Description
Top Market Skills	*Manage Job Architecture Hub: Market Skills*	Displays the top market skills for your job profiles. Market skills are based on Workday customers who've opted to provide data. Workday uses machine learning to find similar jobs in the Workday customer market, and aggregates inferred skills from those jobs to return the top market skills. The report is sorted by the top market skills for your job profiles. The positions in the Associated Positions column in market skills reports are secured to the *Worker Data: All Positions* domain. To use this page you must opt-in to machine learning. See *Steps: Set Up Job Architecture Hub*.

Job Profile Analysis

Item	Security	Description
Find Similar page	*Job Profile: Find Similar Jobs*	Displays the Find Similar Job Profiles report. Displays sets of similar job profiles. You can use the Compare Similar Profiles button to view a more detailed report allowing you to determine how you might want to act. Workday generates an AI explanation. You can opt out of the explanation using the Maintain Find Similar Job Profiles task. Workday uses these data points to determine similar job profiles: • Job Profile Name • Job Profile Summary • Job Description You can use the Actions column to launch these tasks if you have access to them:

Item	Security	Description
		• Edit Job Profile View Job Profile Audit You can use the Maintain Find Similar Job Profiles task to customize the criteria for returning similar job profiles. These compensation fields are contextually secured: • Compensation Grade • Compensation Grade Profile To use this report you must opt-in to machine learning. See *Steps: Set Up Job Architecture Hub*.
Data Gaps page	*Audit: Job Architecture Hub* Users with access to the *Audit: Job Architecture Hub*domain can see all position and job requisition data on this page.	Displays the Job Profiles With Missing and Inconsistent Data report. Displays job profiles with missing pay rate types, job classifications, skills, job summaries, and job descriptions. You can use the Actions column to launch the Edit Job Profiles task if you have access to it.
Without Workers page	*Audit: Job Architecture Hub*	Displays the Job Profiles Without Workers report. Displays the number of active job profiles with no associated workers. You can use the Actions column to launch these tasks if you have access to them: • Edit Job Profile • Audit Job Profile
Job Profiles Out-of-Date page	*Job Profile: View*	Displays the Active Job Profiles Out-of-Date report. Displays the active job profiles that you haven't updated in the last 6 months, 6-12 months, or over 1 year. Based on your security access, the report also displays the related job families, compensation grade, date of

Item	Security	Description
		last update, and number of workers in the job profile.

Job Profile Reports

Item	Security	Description
All Active Job Profiles	*Job Profile: View*	Displays a consolidated overview of all active job profiles, including all attributes of the job profiles. These compensation fields are contextually secured: • Compensation Grade • Compensation Grade Profile
Manage Job Profile In Progress Events	*Job Profile: Manage Job Profile Events*	Displays all in progress Manage Job Profile events, the Date and Time Initiated, Effective Date, and Awaiting Person(s).

Related Information
Examples
Workday AI Fact Sheet: Market Skills for Job Profiles
Workday AI Fact Sheet: Find Similar Job Profiles

Steps: Set Up Job Catalog

Context

Define characteristics of jobs and positions in the job catalog before filling jobs or positions in a supervisory organization. A job catalog can include levels, titles, grades, compensation, and other attributes.

Steps

1. Create Job Profiles on page 573.

   This describes the jobs or positions in your organization. A job profile can belong to one or more job families.

   You can also configure workflows, such as review and approval, for creating and editing job profiles by setting up the *Manage Job Profile* business process.
2. Create Job Families on page 578.

   This groups job profiles within the job catalog. A job family can belong to a job family group.
3. Create Job Family Groups on page 579.

   A job family group represents a collection of job families.

Example

Job Profile	Job Family	Job Family Group
Senior Benefits Analyst	HR - Benefits	Human Resources
Staff Benefits Analyst		

Job Profile	Job Family	Job Family Group
Senior Payroll Specialist Staff Payroll Specialist	HR - Payroll	
Senior Recruiter Staff Recruiter	HR - Recruiting	

Next Steps

- Create jobs or positions.
- View job catalog reports.

Related Information

Tasks

Create Hiring Restrictions on page 591

Create Positions on page 595

Reference

Reference: Job Catalog Reports on page 581

The Next Level: Build a Job Catalog to Stand the Test of Time

Steps: Set Up Job Profile Business Process

Context

Configure workflows for the Create Job Profile and Edit Job Profile tasks, such as approval and review steps.

The *Manage Job Profile* business process and the *Submit Job Profile* web service use snapshots to capture the job profiles that are effective as of a particular date. When you edit job profiles in date order, each effective date is a snapshot view of the job profile. When you enter job profiles out-of-date order and back-date the Effective Date field, your change won't automatically update the job profile on all later-dated snapshots. Use the Edit Job Profile task to update job profiles on all later-dated snapshots. Example: You have an existing job profile named *Manager A*. You edit the job profile to rename it to *Manager B*, effective 2024-06-01. Later, you edit the job profile to rename it *Manager C*, effective 2024-03-01. You review the job profile on 2024-07-01. The job profile name is *Manager B*, because it's the most recently effective change. Note that all job profile fields are effective dated except Job Code.

Steps

1. Edit Business Process Security Policies.

   Configure the security policy for the *Manage Job Profile* business process in the Staffing functional area.

   You can set up the security for the *Submit Job Profile* web service initiating action.

   You can configure both unconstrained and constrained security groups for the initiating action. For all other actions, you can only configure unconstrained security groups.
2. Edit Business Processes.

   Configure the *Manage Job Profile* business process in the Staffing functional area.
3. (Optional) Enable skills suggestions on the *Manage Job Profile* business process.

   Enable Skills Cloud and select the Populate Skill Suggestions for Job Profiles check box on the Maintain Skills and Experience Setup task.

   See Enable Skills Cloud.

   When the users access the Create Job Profile and Edit Job Profile tasks, they'll see skill suggestions. The skill suggestions will dynamically update as they modify details on the job profile.

4. (Optional)Steps: Set Up Job Description Generation on Job Profiles on page 571.
5. (Optional) Steps: Set Up Similar Existing Job Profiles on page 572.
6. (Optional) Hide or Require Optional Fields.

   Hide or require optional fields, sections, and tabs on the *Manage Job Profile* business process. Workday will hide or require them on the Create Job Profile and Edit Job Profile tasks.

   For some fields, you can select which security groups you want to require a field, or make it not enterable. Example: You want to require the fields in the Pay Rate Types section for HR Administrators, and not enterable for Compensation Administrators.

   When you configure a field as required and select the Enforce Required in Web Services check box, you must enter a value in the field in the *Submit Job Profile* web service.
7. (Optional) Configure what users can view on the Job Profile report.

   You can configure which security groups can view the Overview, Compensation, Pay, and Business Process History tabs on the Job Profile report. Users with access to the:

   - *Job Profile: Compensation* domain can view the Compensation tab in the Overview section.
   - *Job Profile: Pay* domain can view these reports: Pay Rate Type, Job Exempt, Workers' Compensation Code.
   - *Job Profile: Manage Job Profile Events* domain can view the Business Process History tab.

   Access the Configure Optional Fields task to customize what users can view on the Overview and Characteristics tabs on the Job Profile report. Use the *Job Profile Overview – Profile*, and *View Job Characteristics – Profile View* functional areas.

Result

Users can initiate the *Manage Job Profile* business process to create or edit job profiles.

Next Steps

Workday enables you to rescind the *Manage Job Profile* business process. When configured, users can rescind a *Manage Job Profile* business process event from the:

- Related action of the *Manage Job Profile* event.
- Mass Rescind task.
- Rescind web service.

You can't rescind:

- A *Manage Job Profile* business process event that's the only event on the earliest effective date and in use.
- Changes made to the job profile before the introduction of the *Manage Job Profile* business process.
- Those changes were not a business process event, and therefore can't be rescinded.

When a *Manage Job Profile* event is rescinded:

- It's removed from the Business Process History tab on the View Job Profile report.
- The rescinded data is no longer searchable through Global Search. You can view the rescinded event from the Audits > View Audit Trail related action on the associated job profile.
- All data on the job profile is restored to the previous state according to effective date. Except, the Job Code on the associated job profile remains the same.
- If the rescinded event is the the only event in the job profile's history, the Job Code and all associated data is cleared from the job profile.

Related Information

Tasks

2024R2 Feature Release Note: Effective Dating Enhancements for Job Profile

2024R2 Feature Release Note: Job Profile User Interface

2024R1 What's New Post: Job Profile Business Process

Steps: Set Up Job Description Generation on Job Profiles

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Security: *Manage: Machine Learning for Job Descriptions* domain in the Staffing functional area.

Grant Modify access to *Manage: Machine Learning for Job Descriptions* domain to the appropriate roles.

Context

Job Description Generation on Job Profile enables you to create job descriptions using generative artificial intelligence and reducing manual effort.

Workday uses these data points to generate job descriptions:

- Job Profile Name: The name you entered on the job profile.
- Company Name: The name associated with your tenant.
- Preferred Display Language: The user's language.

Steps

1. Access the Innovation Services and Data Selection Opt-In task.

   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.
2. On the Innovation Services Opt In tab, select HCM on the Available Services tab.
3. On the Maintain Innovation Services Data Selection Opt In tab, select HCM: HCM ML Features and Third Party Connectors GA.

4. Select the Opt In check box to enable these categories on the HCM: HCM ML Features and Third Party Connectors GA tab:

    - Job Requisition Data
    - Job Posting Data

    If you're already opted in to Innovation Services and Data Selection Categories, you must select the Opt In to Additional Data check box, if available. You might need to wait 24 hours after you opt in, for the Generate with AI button to display on your tasks.

Result

You can use the Generate with AI button on the Job Description field on these tasks, to create job descriptions:

- Create Job Profile
- Edit Job Profile

Related Information

Tasks

Create Job Profiles on page 573

Steps: Set Up Job Description Generation on Job Requisitions on page 222

Workday Community: Job Description Generation on Job Profile AI Fact Sheet

2025R1 Feature Release Note: Job Description Generation on Job Profile

Steps: Set Up Similar Existing Job Profiles

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Security: *Job Profile: Find Similar Jobs* domain in the Staffing functional area. Users must have access through an unconstrained security group.

Context

The Similar Existing Job Profiles feature enables you to view similar job profiles using generative artificial intelligence when using the *Manage Job Profile* business process. This helps you reduce duplicate job profiles.

Workday uses these data points to determine similar job profiles:

- Job Profile Name
- Job Profile Summary
- Job Description

Steps

1. Access the Innovation Services and Data Selection Opt-In task.

   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.
2. On the Innovation Services Opt In tab, select HCM on the Available Services tab.
3. On the Maintain Innovation Services Data Selection Opt In tab, select HCM ML Features and Third Party Connectors GA.
4. Select the Opt In check box to enable the Talent Profile Data category on the HCM ML Features and Third Party Connectors GA tab.
5. If you're already opted in to Innovation Services and Data Selection Categories, you must select the Opt In to Additional Data check box, if available.
6. (Optional) Customize the criteria for returning similar job profiles:

   Access the Maintain Find Similar Job Profiles task. Select which fields must have identical values in order to be considered similar. Example: When you select Job Level, Workday only displays job profiles with the same job level.

Result

When you access the *Manage Job Profile* business process, Workday displays a Does This Job Profile Already Exist? panel with the Similar Existing Job Profiles report.

Example

You want to create a new job profile for a Machine Learning Engineer. You access the Create Job Profile task which launches the *Manage Job Profile* business process. You enter a Job Profile Name. The Does This Job Profile Already Exist? panel displays a similar job profile that already exists. You cancel the creation of the new job profile, and edit the existing job profile to match your needs.

Next Steps
It may take up to a week to see results in your Production tenant after opting in.

The Find Similar Job Profiles machine learning features can only be used in your Preview and Production tenants. Implementation tenants are not supported.

Related Information
Tasks
Steps: Set Up Job Architecture Hub on page 561

Create Job Profiles

Prerequisites

- Set up basic staffing information and job qualifications.

  Example: Management levels, job categories, work shifts, pay rate types, certifications, competencies, education, and skills.
- To generate job codes automatically, create an ID definition for job codes and select it in the Edit Tenant Setup - HCM task.

- To configure a frequently used filter on the Restrict to Country prompt, select the relevant countries in the Frequently Used Values section of the Edit Tenant Setup - Global task.
- To hide or require optional fields on the Create Job Profile and Edit Job Profile tasks, use the *Manage Job Profile* functional area on the Configure Optional Fields task.
- Security: *Set Up: Job* domain in the Jobs & Positions functional area.

Context

Define characteristics of jobs and positions.

By default, the Create Job Profile task is an initiating action on the *Manage Job Profile* business process. You can set up the business process to add additional steps to suit the needs of your organization.

You can load and retrieve current job profiles in bulk using these web services:

- Submit Job Profile
- Get Job Profile

When you run the Get Job Profile web service for a job profile that's effective in the future, it only retrieves the ID for the job profile.

Steps

1. Access the Create Job Profile task.
2. Enter an Effective Date.
3. As you complete the task, consider:

Option	Description
Job Profile Name	If you leave the Job Title Default field blank, Workday uses this name as the business title in staffing events. You can override the business title when you staff the job or position. If you want to use the same name as existing job profile in the same Job Family, you must either: • Enter effective dates that don't overlap with the existing active job profile. • Inactivate the existing job profile. • Select a different Job Family.
Job Code	If you set up your tenant for automatic job codes, leave this field blank to have Workday generate the job code. If you enter your own job code, it overrides the generated job code. If you don't use automatic job codes, populate this field.
Job Profile Summary	Enter a description to help selecting an appropriate job profile for a position. The job profile summary automatically populates in the Create Position and Create Job Requisition tasks when you select this job profile.
Job Title Default	If staffing events hire, transfer, or promote employees into this job profile, the business

Option	Description
	title automatically populates from this value. You can override the title when you staff the job or position.
Restrict to Country	Select the countries where this job profile is valid, or leave this blank if the job profile is available for all countries. • Country restrictions automatically apply to the *Change Job* business process, which filters job profiles based on a worker's location. • In other staffing business processes, you can create an exit rule using the Countries for Job Profile or Job Profile Valid for Location report field. The rule enables you to verify that a job profile is valid for a worker's location. • You can also use the Frequently Used prompt category with the *Job Family* filter to identify the proper job profile for staffing transactions.
Job Category	The job category automatically populates in staffing tasks that hire, transfer, or promote employees into this job profile. During a staffing event, you can't override or modify job categories that automatically populate to a worker's job or position from a job profile. You can only apply 1 job category to a job profile.
Company Insider Type	The insider type automatically populates in staffing tasks that hire, transfer, or promote employees into this job profile. You can override the default insider type for a worker when you staff the job or position.
Referral Payment Plan	For Recruiting only. Associates a payment plan for successful referrals with the job profile. Workday automatically associates the selected referral payment plan with all job requisitions that use this job profile.
Work Shift Required	Specifies that the job profile is requiring a work shift for any worker hired, transferred, or promoted into a job or position based on this job profile.
Public Job	Enables employees to select this job profile as a job interest.
Job Description	The job description automatically populates in the Create Position and Create Job Requisition tasks when you select this job profile. If you have set up job description generation on job profiles, you can use the Generate with AI button. Workday creates the job descriptions

Option	Description
	using generative artificial intelligence. See *Steps: Set Up Job Description Generation on Job Profiles*.
Additional Job Description	For Recruiting only. The additional job description automatically populates in the Create Job Requisition and Create Evergreen Requisition tasks when you select this job profile. You can configure this field to display on your internal or external career site using job posting templates.

4. In the Pay Rate Types section, associate the job profile with default pay rate types by country.

   This option enables you to create 1 global job profile that reflects local preferences and requirements for pay rate types. These values automatically populate into the Hire Employee, Change Job, and other Staffing tasks. You can override the country-specific defaults by editing the job profile.

   When you staff a job or position based on this job profile, Workday determines the default pay rate type. The default pay rate type is based on the job and position primary business address and location in these tasks:

   - Create Position
   - Set Hiring Restrictions
5. (Optional) Enter additional information about the job profile, such as Characteristics, Compensation, Unions, Work-Study , and specific qualifications.

   As you complete the task, consider:

Option	Description
Compensation Grade	Select the standard compensation range for the job profile. Grades are guidelines used in determining compensation for a worker.
Compensation Grade Profile	Select the grade profile associated with the selected compensation grade. Grade profiles create more granular compensation ranges within the grade.

Next Steps

- You can translate the values for the Job Profile instance you created by accessing the Translate Tenant Instance task from the Translate related action. However, selecting the Hide Translations after Base Value Change check box won't hide the translation for tenanted translations. If you update the base value on the job profile, you must manually access the Translate Tenant Instance task and update or delete the Translated Value.
- Create jobs or positions.
- To view the job profile you created, access the Job Profile report:
  - Use the View As Of field to view a snapshot of a job profile as of a specific date. You can only select job profiles that are effective on the View As Of date.
  - To select content for the report, use the Configure Profile and Configure Profile Group tasks.
  - Use the Business Process History tab to view details for any job profiles that you create or edit using the *Manage Job Profile* business process.

- To modify or inactivate a job profile, use the Edit Job Profile task.

  The *Manage Job Profile* business process and the *Submit Job Profile* web service use snapshots to capture the job profiles that are effective as of a particular date. When you edit job profiles in date order, each effective date is a snapshot view of the job profile. When you enter job profiles out-of-date order and back-date the Effective Date field, your change won't automatically update the job profile on all later-dated snapshots. Use the Edit Job Profile task to update job profiles on all later-dated snapshots. Example: You have an existing job profile named *Manager A*. You edit the job profile to rename it to *Manager B*, effective 2024-06-01. Later, you edit the job profile to rename it *Manager C*, effective 2024-03-01. You review the job profile on 2024-07-01. The job profile name is *Manager B*, because it's the most recently effective change. Note that all job profile fields are effective dated except Job Code.
- To hide the job profile on the worker profile, use the *Worker Profile - Job - Job Details* functional area on the Configure Optional Fields task.
- To review job profiles and pay amounts, view the Employee Compensation Ranges for Job Profiles report.
- To identify and correct positions that don't meet the country restrictions for their job profile, view the Positions with Invalid Location for Job Profile report.
- To audit updates to the job profile made:
  - Prior to 2024-03-09, Workday recommends that you create an audit history using the Create Audit Log task.
  - After 2024-03-09, Workday recommends that you create a custom report using the event-based current and proposed report fields on the Manage Job Profile Event business object.

Related Information

Tasks

Create a Public Job Catalog on page 1537

Steps: Set Up Basic Staffing Information on page 525

Create Positions on page 595

Create Hiring Restrictions on page 591

Steps: Set Up Skills and Experience on page 119

Hide or Require Optional Fields

Steps: Set Up Referral Payment Processes on page 441

Hide or Require Optional Fields for Referrals on page 443

Create Compensation Grades on page 989

Reference

Reference: Job and Business Titles on page 928

2024R2 Feature Release Note: Effective Dating Enhancements for Job Profile

2024R2 Feature Release Note: Job Profile User Interface

Steps: Filter Job Profiles by Country

Context

When you need to locate job profiles for Staffing transactions, you can filter by country to narrow your search results. You can limit the results even further by selecting frequently used countries in your Workday tenant. This enables you to filter job profiles to a subset of job family categories within those frequently used countries.

You can select the Frequently Used prompt for the job profile on these tasks:

- Change Job
- Create Job Requisition
- Create Position

- Edit Job Profile
- Edit Job Requisition
- Edit Position
- Edit Position Restrictions

Steps

1. Access the Edit Tenant Setup - Global task.

   In the Frequently Used Values section, select 1 or more frequently used countries.

   See Reference: Edit Tenant Setup - Global.
2. Create Job Profiles on page 573.

   In the Profile Details section, use the Frequently Used prompt category in the Restrict to Country prompt to select the relevant countries for the new job profile.

Create Job Families

Prerequisites

Security: *Set Up: Job* domain in the Jobs & Positions functional area.

Context

You can use job families to group job profiles within the job catalog. A job profile can belong to one or more job families.

Note: If a job family contains positions associated with position budgets, it can't be modified or deleted.

Steps

1. Access the Create Job Family task.
2. Specify an Effective Date.
3. Specify a Job Family Name.

   Job families and job family groups must have different names.
4. Select staffing elements related to this job family:

Option	Description
In Job Family Group	A job family can belong to only 1 job family group. You can add this job family to a job family group when you create it.
Used in Job Profiles	You can add more than 1 job profile to this job family.

5. Provide a Job Family Summary for reference.
6. (Optional) Access the Configure Optional Fields task and select the relevant business process in the By Functional Area field to hide fields you don't use, and control field visibility based on security groups.
7. (Optional) Specify an Occupational Series code. This field is delivered hidden by default using the Configure Optional Fields task. Access the Maintain Custom Labels task to rename this field based on your organizational needs.

Next Steps

- Create job family groups.
- To update or inactivate a job family, use the Edit Job Family task. You can't select an Inactive job family from menu prompts, but it remains valid for workers to whom it is already assigned.

You can use the *Worker Data: Job Family on Worker Profile* domain to control the visibility of a worker's job family when viewing their own or other workers' profiles.

Related Information
Tasks
Steps: Set Up Job Catalog on page 568

Create Job Family Groups

Prerequisites

Security: *Set Up: Job* domain in the Jobs & Positions functional area.

Context

Organize related job families into a job family group.

Steps

1. Access the Create Job Family Group task.
2. Specify an Effective Date.
3. Specify a Job Family Group Name.

   Job families and job family groups must have different names.
4. Add 1 or more Job Families to the job family group.
5. (Optional) Provide a Job Family Group Summary for reference.

Next Steps

To update or inactivate the job family group, use the Edit Job Family Group task.

You can use the *Worker Data: Job Family on Worker Profile* domain to control the visibility of a worker's job family group when viewing their own or other workers' profiles.

Related Information
Tasks
Steps: Set Up Job Catalog on page 568

Mass Update Job Profile Skills with Workbooks

Context

The Edit Skills on Job Profile workbook makes it possible for users to maintain and update job profile names, summaries, and skills data in bulk using Worksheets. This workbook only supports unconstrained security groups.

If you want to access suggested skills within the workbook, you’ll need to subscribe to Workday Skills Cloud. Workday suggests that you enable Skills Cloud Skills within the workbook to use all supported skills types on job profiles.

Steps

1. Steps: Set Up Mass Actions.

   Configure Modify access for users on the Mass Action Events domain.

2. Edit Business Process Security Policies.
    - Configure security permissions on the *Mass Action Event* business process type:
        - Configure the security groups that you'd like to launch and submit the workbook on the *Launch Mass Action Event* initiating action step.
        - Configure the security groups that you'd like to receive the workbook upon initial generation and complete the mass action event. Use the *Complete Mass Action Event* action step type.
        - (Optional) Configure the security groups that you'd like to cancel the workbook on the *Cancel* step type.
    - Configure security permissions on the *Manage Job Profile* business process type:
        - Configure the security groups that you'd like to launch and submit the workbook on the *Edit Skills on Job Profile (Mass Action)* initiating action step.
3. Edit Domain Security Policies.

    Grant access to these domains by selecting security groups and specifying whether they have permission to view or modify data:

Domain	Functional Area	Access Modes	Considerations
Drive	System	View and Modify	Gives users Drive access to create and manage worksheet data.
Worksheets	System	View and Modify	Gives users the ability to generate workbooks.

4. Activate Pending Security Policy Changes.
5. (Optional) Hide or Require Optional Fields.

    You can't hide or mark fields as view-only by security group.
6. Enable Skills Cloud.

    To enable Skills Cloud Skills and suggested skills within the workbook, in the Skills section, select:
    - Enable Workday Skills Cloud
    - Populate Suggested Skills for Job Profiles

    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.

    Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
7. (Optional) Create Custom Reports.

    Create or edit a custom report that has a data source containing job profiles. You can use the report or report filter to populate up to 1000 workers in the workbook using the Launch Mass Action Event task. Example: You have created a custom report that you use regularly to maintain your job profiles, and you want to use it to mass update job profile skills.

    You can use a Workday-delivered report or a custom report. Workday recommends that you use the Workday-delivered Suggested Skills on Job Profile report.
8. Access the Launch Mass Action Event task to generate the workbook.
    a. Select Edit Skills for Job Profiles as the Mass Action Type and any report that contains job profiles. Workday recommends that you use the Suggested Skills on Job Profile report.
    b. (Optional) Configure the Pre-populate Skills on Job Profile section with the skills that you'd like to prepopulate into your Workbook once it generates.

9. After the workbook generates, access My Tasks and click Open Workbook.

   Complete the details in the workbook using the prompts and validation messages. You can also share this workbook with other users to collaborate on data entry.

   Note: You can't add a row to the workbook but you can delete a row or cancel the workbook.
10. Select Validate All.

    Resolve errors and submit the workbook. Any rows with errors remain in the workbook instead of updating job profiles. You can access the workbook later to resolve and submit any remaining rows.
11. Complete the mass action event after you submit or delete remaining workbook rows.

Result

When you submit the workbook, Workday kicks-off a *Manage Job Profile* business process event for every job profile that you've submitted. After Workday generates the workbook, it remains available in the drive of the user for evaluation.

Next Steps

You can keep track of all the workbooks associated to job profile updates by using the All Events - Edit Skills on Job Profile Mass Action report field.

You can also use the Job Profile - Current tab to compare updated values against pre-existing data in the workbook.

Related Information
Reference
2022R2 What's New Post: Skills on Job Profile Workbook
FAQ: Collaboration and Security in Worksheets
2023R1 What's New Post: Skills on Job Profile Workbook Enhancements

Reference: Job Catalog Reports

Use these reports to view the job catalog and track the workers assigned to particular job profiles, job families, or job family groups.

Report	Description
Directory by Job Family	Lists all workers assigned to specific job families, including their organizations and contact information.
Directory by Job Family Group	Lists all workers assigned to specific job family groups, including their organizations and contact information.
Directory by Job Profile	Lists all workers assigned to specific job profiles, including their organizations and contact information.
Job Catalog	Offers a consolidated view of job family groups, job families, and job profiles. For each job profile, you can see: • Assigned job codes. • Compensation grade. • Job classification groups. • Management levels.

Report	Description
Job Profile	Displays information about a specific job profile, such as: • Basic job information. • Compensation. • Pay data. • Qualifications. • Recruiting metrics. You can select the content groups and reports that you want to display on the profile using the tasks: • Configure Profile • Configure Profile Group
Suggested Skills for Job Profile	Uses Workday Skills Cloud and machine learning to provide suggested skills for job profiles. The skill suggestions update hourly and provide up to 10 suggested skills for each reporting item. You can view suggested skills for job profiles based on: • Job profile text data • Job requisition text data • Job requisition skill data

Related Information

Tasks

Steps: Set Up Job Catalog on page 568

Steps: Set Up Profiles and Profile Groups

Reference

The Next Level: Reporting Foundation - Core HCM

Staffing Models

Manage Staffing Models

Prerequisites

To change a staffing model for your organization, rescind any in-progress or completed:

- Hiring or position restriction events.
- *Move Worker (By Organization)* events.
- Staffing events.

Context

Assign staffing models to supervisory organizations to establish how you define and fill jobs and positions.

Steps

- Assign a staffing model to a new parent organization:
    a) Access the Create Supervisory Organization task.
    b) On the Staffing Model tab, select either *Position Management Enabled* or *Job Management Enabled*.

  A supervisory organization has 1 staffing model. However, not all supervisory organizations require the same staffing model.

  Security: *Create: Supervisory Organization* domain in the Organizations and Roles functional area.

  Note: When you attach subordinate organizations to this organization using the Create Subordinate Organization task, the subordinate organizations automatically inherit the staffing model of the parent organization.
- Change the staffing model assigned to a parent organization or update the staffing model that a subordinate organization inherits from its parent organization:
    a) Search for the organization.
    b) From the related actions menu of the organization, select Organization > Edit Staffing Model.
    c) Specify either *Position Management Enabled* or *Job Management Enabled*.

  Security: *Set Up: Staffing Model* domain in the Staffing functional area.

  Note: Changing the staffing model of a parent organization doesn't automatically change the staffing model of existing subordinate organizations. You can use the Edit Staffing Model task to change the staffing model of a subordinate organization to match the parent organization.
- View and maintain the staffing models of all organizations that you own:
    a) Access the Maintain Staffing Models task.
    b) Update and maintain the staffing models assigned to the organizations that you own.

  Set Up: Staffing domain in the Staffing functional area.

Next Steps

Create jobs or positions.

Related Information

Tasks

Set Up Supervisory Organizations

Create Hiring Restrictions on page 591

Create Positions on page 595

Reference

Reference: Staffing Model Comparisons on page 586

Concept: Staffing Models

Workday supports 2 types of staffing models: position management and job management. These staffing models provide a different level of control over staffing and support different staffing goals.

Position Management

Position management provides the greatest control over hiring. It enables you to define separate hiring rules and restrictions for each position.

Key Features	• Requires you to specify the number of positions to fill. • Requires an open, approved position before you can hire, promote, transfer, or demote workers.

	• Each position you create can have its own definition and hiring restrictions.
Example	Helen Meyer manages a team of customer support specialists in different locations across the country. The requirements vary widely by position and location: • Pay scales. • Expected job skills. • Experience. In addition, each position Helen opens requires a separate approval by her HR Partner. Helen needs the ability to define each position based on the hiring location and current company needs. Because she's subject to tight hiring controls, position management is an appropriate staffing model for her organization.

Job Management

Job management provides the least control over the definition of individual positions. The hiring restrictions you define apply to all jobs in the supervisory organization, and you can define only 1 set of hiring restrictions per organization. In addition, there are no limits on the number of jobs that you can fill. For this reason, job management is useful for organizations that prefer to define broad job requirements. These organizations rely on staffing workflow and approvals to control the number of workers in a supervisory organization.

Key Features	• There's an unlimited number of openings. • You don't have to create a separate, open position for each job you want to fill. • Any hiring restrictions you define apply equally to all jobs in the organization.
Example	Jake Lee manages a growing team of software application specialists in a startup company. He needs the flexibility to hire workers with a wide range of skills, backgrounds, qualifications, and work preferences. He doesn't, however, want to restrict his ability to fill jobs as the right people become available. An expanding customer base requires that he increase the size of his team in the areas of: development, documentation, product management, and QA. Jake's manager agrees to let Jake fill 9 additional openings. After several weeks of interviewing, he hires 2 developers and 1 part-time product manager. Jake still has management approval to expand his team, and he does so as he finds the right people. Jake needs flexibility when hiring. He's not interested in filling narrowly defined positions. Instead, he needs to assemble a critical mass of employees in the shortest possible time. Therefore,

Jake's HR Administrator selected job management as their staffing model, enabling them to define a broad set of job requirements that apply to all potential hires.

Related Information

Tasks

Manage Staffing Models on page 582

Reference

Reference: Staffing Model Comparisons on page 586

Concept: Hiring Restrictions

Hiring restrictions are rules, conditions, or constraints that determine the hiring and staffing actions within a job management organization. These restrictions enable you to:

- Limit staffing to specific job families and job profiles.
- Restrict the locations where a job or position can be filled.
- Define the required qualifications, experience, and skill levels of workers hired into a job or position (position management organizations only).
- Limit staffing for a job or position to a specific worker type (employees or contingent workers).
- Limit staffing for a job or position to a specific time type (full or part-time workers).

You can apply requirements associated with generic profiles to a job or position, and further refine them using hiring restrictions. Example: Create a Senior Mechanical Engineer job profile that requires a college degree and fluency in Spanish. Then, define 2 positions with different hiring restrictions:

- Senior Mechanical Engineer - Infrastructure is restricted to full-time employees in New York.
- Senior Mechanical Engineer - Systems is restricted to full-time contractors in San Francisco.

You can also select the Allow Override of Restrictions on Staffing Events check box in the Edit Tenant Setup - HCM task to bypass the hiring restrictions on:

- Job Profile
- Location
- Time Type
- Worker Type

Workday enforces hiring restrictions at the point of hire and not during job requisition creation.

Job Profile Defaulting

The hiring restrictions you set can determine the defaulting behavior of the Job Profile field into a job requisition:

- If you copy a job requisition, the Job Profile field on the source job requisition will default into the new job requisition event.
- If you create a job requisition for a job management organization, the Job Profile may default from the hiring restrictions of the job management organization.
- If the job management hiring restrictions have a single Job Profile, and no Job Family, that Job Profile will default.
- If the job management hiring restrictions have a single Job Family, which contains a single Job Profile, and no job profiles, the Job Profile in the Job Family will default.
- If the job management hiring restrictions has a single Job Family, which contains a single Job Profile, and only 1 separate Job Profile which is the same as the Job Profile of the Job Family, that Job Profile will default.

- If any other combinations are set on the job management organizations hiring restrictions, example: multiple job profiles, 1 or multiple job families with multiple profiles or both job profiles and job families with a combined number of profiles greater than 1, no defaulting will occur.
- If you create a job requisition for a new position for a Position Management organization, no defaulting will occur.
- If you create a job requisition for an existing position in a Position Management organization, defaulting behavior will be based on your current tenant setup.

  You can use Edit Tenant Setup-HCM task to set up the defaulting behavior of your tenant. In the Job Requisitions section, select the appropriate option for your Defaulting Behavior for Position Management Job Requisitions:

  1. If you select Default from Position Restriction on Create Job Requisition, Workday will default the Job Profile from the Job Profile or Job Family set on the Position Restriction. This will be default behavior if there is a single Job Profile, similar to the behavior of job profiles and job families outlined for Job Management organizations above.

     If the job requisition is for multiple existing positions, Workday will default the Job Profile from the Job Profile or Job Family set on the position restriction of the Defaulting Position that you specify.
  2. If you select Default from Most Recent Filled Position on Create Job Requisition, Workday will default the Job Profile from the job profile of the worker who last occupied that Position Restriction.

Managing Hiring Restrictions

Hiring restrictions must exist on the Job Management organization before a job requisition can be created.

To edit existing hiring restrictions, select Edit Hiring Restriction from the related actions menu of the job management organization with the hiring restrictions.

You can also Set Hiring Restriction from the related actions menu of the organization.

You can view the hiring restriction on a job management organization from the Staffing tab of the supervisory organization.

Related Information

Concepts

Concept: Workday Docs

Tasks

Create Job Profiles on page 573

Create Job Families on page 578

Create Job Family Groups on page 579

Create Hiring Restrictions on page 591

Create Positions on page 595

Steps: Set Up Workday Docs

Reference: Staffing Model Comparisons

Compare the 2 staffing models in Workday (position management and job management) in these areas:

- Staffing Restrictions
- Hiring Limits and Controls
- Moving Workers, Jobs, and Positions
- Organization Assignments
- Change Job on page 589
- Compensation
- Tracking and Reporting

Staffing Restrictions

	Position Management	Job Management
Set hiring restrictions based on job family, job profile, worker type, location, and full-time or part-time status?	Yes	Yes
Define hiring restrictions based on personal qualifications such as education, experience level, languages spoken?	Yes	No
Level at which Workday sets hiring restrictions?	Hiring restrictions apply at the level of individual positions.	Hiring restrictions apply to the entire organization. You can't define hiring restrictions for individual jobs in the organization.

Hiring Limits and Controls

	Position Management	Job Management
Imposes hiring limits?	Yes. Specify the number of positions that you want to fill; Workday enables you to fill only open positions.	No. Workday imposes no limit on the number of jobs that you can fill in an organization; however, you can set up workflow to require approval for individual jobs.
Open position required before you can hire a worker?	Yes	No
Approval required to fill positions or jobs?	There's no required approval process. Depending on your workflow configuration, you might need approval to create and fill a position.	There's no required approval process. Depending on your workflow configuration, you might need approval to fill a job.
Ability to adjust headcount up or down?	Yes. You can request new positions using the Create Position task; you can close existing ones using the Close Position task. Both tasks have configurable workflow and approvals.	No. Workday imposes no limit on the number of jobs that you can fill in an organization; however, you can limit hiring by enabling approval workflow.
Ability to use job requisitions?	Yes	Yes

Moving Workers, Jobs, and Positions

	Position Management	Job Management
You can move multiple workers from 1 organization to another?	Yes	Yes
You can move multiple positions from 1 organization to another?	Yes	Yes

	Position Management	Job Management
You can move a worker along with their current position or job into a new organization as part of a job change?	Yes	Yes
A worker can be moved into a new position or job in another organization as part of a job change?	Yes	Yes, depending on what you set up at the tenant level for Change Job.
Positions or jobs persist in the old organization after a job change or termination?	• If you move a worker together with their current position into a new organization, the position is unavailable for staffing in the old organization. • If you move a worker into a new position in another organization, you can either close the position in the old organization or keep it open for staffing. • When you terminate an employee, you can either close the position in the employee's organization or keep it open for staffing.	• If you move a worker together with their current job into a new organization, the job remains available for staffing in the old organization. • If you move a worker into a new job in another organization, the job remains available for staffing in the old organization. • When you terminate an employee, the job remains available for staffing in the employee's organization.

Organization Assignments

	Position Management	Job Management
Organization assignments automatically populate (ability to define at the supervisory organization level the company, cost center, and region that defaults to a newly created position or job)?	Yes	Yes
Edit the organization assignments for an open/unfilled position (ability to change the company, cost center, or region that you assigned the position to)?	Yes. You can edit the assignments for each position separately.	No
Edit the organization assignments (ability to change the company, cost center, or region that you assigned the position to) for a filled position?	Yes	Yes

Change Job

You can configure change job for a tenant by selecting the Change Job Use Default Organizations for Job Management check box on the Edit Tenant Setup - HCM task.

	Position Management	Job Management with Change Job Use Default Organizations for Job Management cleared	Job Management - Change Job Use Default Organizations for Job Management selected
When you initiate a Change Job between organizations, Workday moves the worker into a new position?	Yes	No	Yes
When you initiate a Change Job between organizations, Workday applies hiring restrictions to the new position?	No	No	Yes
When you initiate a Change Job between organizations, Workday removes the worker's role assignments?	Yes	No	Yes
When you initiate a Change Job between organizations, Workday populates organization assignments from the new position or job requisition. When there's no job requisition selected, Workday populates the organization assignments from the proposed supervisory organization?	Yes	No	Yes
When you initiate a Change Job between organizations, Workday creates a new position ID?	Yes	No	Yes
You can reassign roles by configuring the Copy Role Assignments service step on the *Change Job* business process definition of the receiving organization?	Doesn't apply.	Doesn't apply.	Yes

Compensation

	Position Management	Job Management
Assign default compensation to a position or job based on either rules or direct assignment?	Yes	Yes

Tracking and Reporting

	Position Management	Job Management
Ability to report on both open and filled positions?	Yes	No. Workday only tracks filled positions.
Full reporting on staffing events (reporting on all hires, job changes, and terminations, with access to details of the job, worker, process, and approvals)?	Yes	Yes
Track worker history (ability to track details of all business processes from the perspective of individual workers - hires, job changes, terminations, compensation changes, bonuses, and so forth)?	Yes	Yes
Track basic position history (ability to track position history from the time an individual worker is hired into a position until the worker transfers out or is terminated)?	Yes	Yes
Track advanced position history (ability to track history of open and closed positions across different workers who have occupied the position)?	Yes	No

Related Information

Concepts

Concept: Staffing Models on page 583

Concept: Hiring Restrictions on page 585

Tasks

Manage Staffing Models on page 582

Maintain Jobs

Create Hiring Restrictions

Prerequisites

- Create supervisory organizations.
- Set up basic staffing information.
- Set up the job catalog.
- Configure the *Hiring Restrictions* business processes and security policy in the Staffing functional area.
- For academic jobs, enable educational institution features and tenure tracking in the Edit Tenant Setup - HCM task.

Context

Before you can hire, transfer, promote, or demote workers into a supervisory organization, you must:

- Open jobs.
- Apply hiring restrictions to job profiles.

Hiring restrictions control these factors and more:

- The location of jobs.
- Which jobs you can fill.
- Which people can fill the jobs.

Note: Optionally, you can select the Allow Override of Restrictions on Staffing Events check box in the Edit Tenant Setup - HCM task. If you use job requisitions, this option enables you to override job profile restrictions specified on job requisitions.

Steps

1. Access the Set Hiring Restrictions task.
2. Select the Supervisory Organization in which you're opening the job.
3. On the Hiring Restrictions tab, add the hiring restrictions.

Option	Description
Availability Date	Enter the date when the job is available for staffing transactions. The target hire date on job requisitions can't be earlier than this date. Also, you can't change this date after you fill a job for the first time. The Availability Date, which is associated with the supervisory organization, also determines when the job displays in prompts. If you view the job before its availability date, the supervisory organization is blank.
Earliest Hire Date	Enter the earliest date that you can hire a worker into the job. This date can be later than the job Availability Date.
No Job Restrictions	Makes all job profiles in the job catalog available for staffing. When selected, hiring is

Option	Description
	no longer restricted based on location, worker type, or time type.
Job Family	Makes all job profiles associated with these job families available for staffing.
Job Profile	Makes individual job profiles from one or more job families available for staffing.
Location	Limits hiring to the listed locations. If you don't select a location, all location partners can hire workers into the job.
Time Type	Limits hiring to the listed time types.
Worker Type	Limits hiring to the listed worker type.
Worker Sub-Type	Limits hiring to the specific type within the worker type.

Next Steps

- Modify the hiring restrictions placed on a job.
- Correct the details of a job.

Related Information

Concepts

Concept: Hiring Restrictions on page 585
The Next Level: Searching Efficiently for Staffing Organizations

Tasks

Steps: Set Up Basic Staffing Information on page 525
Steps: Set Up Job Catalog on page 568
Change Hiring Restrictions on page 592
Correct Jobs on page 594
Hide or Require Optional Fields
Steps: Set Up Custom Objects
Create Custom Labels

Change Hiring Restrictions

Prerequisites

- Define hiring restrictions for your organization.
- Configure *Edit Hiring Restrictions* business process and security policy in the Staffing functional area.

Context

You can modify the hiring restrictions that limit staffing of a job management organization to specific:

- Job profiles
- Locations
- Time types
- Worker types

These changes don't affect the current incumbents.

Steps

1. Access the Edit Hiring Restrictions task.
2. Select the Supervisory Organization whose hiring restrictions that you want to modify.
3. On the Hiring Restrictions tab, modify the hiring restrictions that apply to the organization.

Next Steps

You can apply these changes to the current job after you update the hiring restrictions. Example: You restricted a job to the Atlanta location, but you want to change the location to Chicago for a specific employee. To do so, add Chicago to the list of allowed locations and then apply the change to the current job holder.

Related Information

Concepts

Concept: Hiring Restrictions on page 585

Tasks

Create Hiring Restrictions on page 591

Hide or Require Optional Fields

Steps: Set Up Custom Objects

Change a Worker's Current Job Details

Prerequisites

Configure the *Edit Position* business process and security policy in the Staffing functional area.

Context

You can modify the details of a worker's current job. These details include the job profile, worker type, time type, location, job classifications, and work shift. These changes apply to the worker currently in the job, but don't apply to future hires or occupants of the job.

The hiring restrictions that you define using the Set Hiring Restrictions task applies to future occupants of a job. Updates apply to all future hires and job changes. You can optionally enable overrides of hiring restrictions in the Edit Tenant Setup - HCM task.

Steps

1. Access the Edit Job task.
2. Select the Job currently occupied by a worker.
3. In the Job Details and Additional Information sections, specify changes to the worker's job.

   Hiring restrictions limit changes to a worker's job profile, time type, and location. These hiring restrictions are associated with the worker's job. Example: The hiring restrictions limit hiring to the Atlanta location. To change the location to Chicago, you must first modify the hiring restrictions.

Result

Workday makes changes as of the Effective Date, except for these fields, which take effect immediately:

- Contract End Date
- End Employment Date
- Exclude from Headcount

Related Information

Concepts

Concept: Hiring Restrictions on page 585

Tasks

Create Hiring Restrictions on page 591
Change Hiring Restrictions on page 592
Create Change Orders for Contingent Workers

Manage Organization Hiring Freeze

Prerequisites

Security: *Manage Organization Hiring Freeze* domain in the Staffing functional area.

Context

You can freeze and unfreeze hiring to manage staffing. The staffing model for job management supports a hiring freeze for the entire organization.

The Manage Organization Hiring Freeze task isn't part of a business process and doesn't include additional steps or approval workflow. Therefore, secure it to roles that don't require approval to freeze and unfreeze jobs.

Steps

1. Select an organization.
2. From the related actions menu of the organization, select Staffing > Manage Organization Hiring Freeze.
3. Select or clear the Hiring Freeze check box.

Correct Jobs

Prerequisites

The original *Hiring Restrictions* event must:

- Have a status of *In Progress* or *Successfully Completed*.
- Not have subsequent events that edit, freeze, or close the job.
- Not have subsequent job requisition events.

Configure the *Hiring Restrictions* business processes and security policies in the Staffing functional area. Only administrators should have security permission to enter corrections.

Context

You can correct the details of a job with some restrictions:

- You can't correct the supervisory organization.
- If you correct the Availability Date, the new date must be on or before the date of:
  - Subsequent staffing events.
  - Default compensation, organizations, and pay group assignments, if those weren't subprocesses of the original event.

Steps

1. Access the Staffing Activity report:
   a) Select the Organization.
   b) Specify the Time Period or Date Range for the original *Hiring Restrictions* event.
   c) Click OK.

2. From the related actions menu on the Headcount Activity or Staffing Activity event, select Business Process > Correct.
3. Correct the event details as needed.

Result

Corrections to the Availability Date automatically apply to the *Change Organization Assignments* subprocess within the original business process.

Related Information
Tasks
Create Hiring Restrictions on page 591

Maintain Positions

Create Positions

Prerequisites

- Create supervisory organizations.
- Set up basic staffing information.
- Set up the job catalog.
- Configure the *Create Position* business process and security policy in the Staffing functional area.
    - If you use commitment accounting, include the *Assign Pay Group for Position Restriction* and *Request Default Compensation for Position Event* subprocesses.
    - You can hide or require optional fields.
    - If you want to track additional data on position restrictions, you can add custom fields.
- For academic positions, enable educational institution features and tenure tracking in the Edit Tenant Setup - HCM task.
- You can enable job overlap on the position restrictions in the Edit Tenant Setup - HCM task.

Context

Before you can hire, transfer, promote, or demote workers into a supervisory organization, you must:

- Open positions.
- Apply hiring restrictions to job profiles.

Hiring restrictions control these factors and more:

- The location of the positions.
- Which of the positions you can fill.
- Which workers can fill the positions.

Note: Optionally, you can select the Allow Override of Restrictions on Staffing Events check box in the Edit Tenant Setup - HCM task. If you use job requisitions, this option enables you to override job profile restrictions specified on job requisitions.

Steps

1. Access the Create Position task.
2. Select the Supervisory Organization in which you're opening the position.

3. On the Hiring Restrictions tab, add the hiring restrictions that apply.

Option	Description
Availability Date	Enter the date when the position is available for staffing transactions. The target hire date on job requisitions can't be earlier than this date. Also, you can't change this date after you fill a position for the first time. The Availability Date, which is associated with the supervisory organization, also determines when the position displays in prompts. If you view the position before its availability date, the supervisory organization is blank.
Earliest Hire Date	Enter the earliest date that you can hire a worker into the position. This date can be later than the position Availability Date.
No Job Restrictions	Makes all job profiles in the job catalog available for staffing. Provides more flexibility than restricting hiring based on location, worker type, or time type.
Job Family	Makes all job profiles associated with these job families available for staffing.
Job Profile	Makes individual job profiles from one or more job families available for staffing.
Job Description Summary	Automatically populates from the first Job Profile that you select, but you can override it. If you select a job family with multiple job profiles, the job description summary won't automatically populate.
Job Description	Enables you to use rich text formatting when creating job descriptions.
Location	Limits hiring to the listed locations. If you don't select a location, all location partners can hire workers into the position.
Time Type	Limits hiring to the listed time types.
Worker Type	Limits hiring to the listed worker type.
Worker Sub-Type	Limits hiring to the specific type within the worker type.
Critical Job	Automatically populates from the Job Profile, but you can override it.
Difficulty to Fill	Automatically populates from the Job Profile, but you can override it.
Available for Overlap	Enables you to backfill a position that already has a worker with an unknown vacating date.

4. (Optional) Enter full-time equivalent information for the position on the Hiring Restrictions tab.

   These fields display when you opt in to the Enable FTE for Position Restrictions check box on the Edit Tenant Setup – HCM task.

Option	Description
Scheduled Weekly Hours Default Weekly Hours	Automatically populates based off of the location and time type that you select. For both fields, when you select multiple or no locations, and select any time type, Workday uses a default value of zero. When a position restriction has a corresponding job requisition, the position restriction now uses the default and scheduled weekly hours on the requisition: • The Default Weekly Hours field is based on the primary location that you select on the job requisition. • Workday inherits the Scheduled Weekly Hours field from the Scheduled Weekly Hours field on the job requisition. For Scheduled Weekly Hours, Workday uses the time profile of the location you select to determine the default value for weekly hours. When you select a single location with the: • No or *Full Time* time types, Workday uses the value in the Default Weekly Hours field. If the value is too large, you can manually update the value to be less than 168 hours. • *Part Time* time type, Workday uses a value of zero.
FTE	This value is calculated by dividing the Scheduled Weekly Hours by the Default Weekly Hours, and displays as a percentage.

5. Complete the Qualifications tab.

Result

You can view position information with these reports:

- View All Positions displays open, filled, frozen, and future-dated positions.
- Position Summary displays filled positions, pending offers, future hires, and the number of position restrictions available for hire by quarter.

Next Steps

- Modify the hiring restrictions placed on a position.
- Correct the details of a position.
- Add custom data to position restrictions by selecting Additional Data > Edit or Additional Data > Edit Effective-Dated Custom Object from the related actions menu.

Related Information

Concepts

Concept: Hiring Restrictions on page 585

Concept: Workday Docs

Tasks

Steps: Set Up Basic Staffing Information on page 525

Steps: Set Up Job Catalog on page 568

Hide or Require Optional Fields

Steps: Set Up Custom Objects

Create Custom Labels

Steps: Set Up Workday Docs

Reference

2021R2 What's New Post: Job Overlap for Positions

2022R1 What's New Post: Full-Time Equivalent on Position Restrictions

The Next Level: Searching Efficiently for Staffing Organizations

View Position Restrictions Information

Prerequisites

- Select content for the View Position Restrictions report using the Configure Profile and Configure Profile Group tasks.
- Security: *Worker Data: All Positions* domain in the Staffing functional area.

Context

You can review information about a specific position, including:

- Hiring restrictions.
- Qualifications.
- Current and historical incumbents.
- Current and historical job requisitions.
- Available position budget.

Steps

1. Access the View Position Restrictions report.
2. Select the links for each profile group and then the tabs within each group.

Next Steps

From the related actions menu on the position restrictions, select Position Restrictions > View As Of to view past hiring requirements for the position.

Related Information

Concepts

Concept: Hiring Restrictions on page 585

Tasks

Steps: Set Up Profiles and Profile Groups

Change Position Restrictions

Prerequisites

- Define hiring restrictions
- Configure the *Edit Position Restrictions* business process and security policy in the Staffing functional area.

Context

You can modify the hiring restrictions that limit staffing of an organization to specific job profiles, locations, time types, or worker types. These changes don't affect the current incumbents.

In the Edit Tenant Setup - HCM task, you can configure to populate these job profile fields on the Create Position and Edit Position Restrictions tasks:

- Critical Job
- Difficulty to Fill
- Job Description
- Job Profile Summary

These fields automatically populate only when you associate 1 job profile with the position restriction.

This task isn't available for positions with open job requisitions. Use the Edit Job Requisition task instead.

Steps

1. Access the Edit Position Restrictions task.
2. Select the Position whose hiring restrictions that you want to modify.
3. (Optional) Enter a Position Change Reason.

   Reasons display when you configure them on the Maintain Event Categories and Reasons task, under the *Edit Position* event. Managers can select the reason if you select the Manager Reason check box.

   You can find the reference ID for these reason categories and reasons by accessing the View Reference ID report for the *General Event Category* or the *General Event Subcategory* business objects.
4. On the Hiring Restrictions tab, modify the hiring restrictions that apply to the organization.
5. (Optional) Enter full-time equivalent information for the position restrictions on the Hiring Restrictions tab.

   These fields display when you opt in to the Enable FTE on Position Restrictions check box on the Edit Tenant Setup – HCM task.

Option	Description
Scheduled Weekly Hours Default Weekly Hours	Automatically populates based off of the location and time type that you select. For both fields, when you select multiple or no locations, and select any time type, Workday uses a default value of zero. When a position restriction has a corresponding job requisition, the position restriction now uses the default and scheduled weekly hours on the requisition: • The Default Weekly Hours field is based on the primary location that you select on the job requisition.

Option	Description
	• Workday inherits the Scheduled Weekly Hours field from the Scheduled Weekly Hours field on the job requisition. For Scheduled Weekly Hours, Workday uses the time profile of the location you select to determine the default value for weekly hours. When you select a single location with the: • No or *Full Time* time types, Workday uses the value in the Default Weekly Hours field. • *Part Time* time type, Workday uses a value of zero.
FTE	This value is calculated by dividing the Scheduled Weekly Hours by the Default Weekly Hours, and displays as a percentage.

Next Steps

If you want to track additional information on position restrictions, you can add custom fields to the *Edit Position Restrictions* business process.

Related Information

Concepts

Concept: Hiring Restrictions on page 585

Tasks

Hide or Require Optional Fields

Steps: Set Up Custom Objects

Reference

2022R1 What's New Post: Full-Time Equivalent on Position Restrictions

Change a Worker's Current Position Details

Prerequisites

Configure the *Edit Position* business process and security policy in the Staffing functional area.

Context

You can modify the details of a worker's current position. These details include the job profile, worker type, time type, location, job classifications, and work shift. These changes apply to the worker currently in the position, and don't apply to future hires or occupants of the position.

The hiring restrictions that you define using the Create Position or Edit Position Restrictions tasks apply to future occupants of a position. Updates apply to all future hires and job changes. You can optionally enable overrides of hiring restrictions in the Edit Tenant Setup - HCM task.

Steps

1. Access the Edit Position task.
2. Select the Position currently occupied by a worker.
3. In the Job Details and Additional Information sections, specify changes to the worker's position.

Result

Workday makes changes as of the Effective Date, except for these fields, which take effect immediately:

- Contract End Date
- End Employment Date
- Exclude from Headcount

Related Information

Concepts

Concept: Hiring Restrictions on page 585

Tasks

Create Change Orders for Contingent Workers

Freeze and Unfreeze Positions

Prerequisites

Configure the *Freeze Position* business process and security policy in the Staffing functional area.

Context

You can freeze and unfreeze positions in position management organizations. Freezing positions makes them temporarily unavailable for staffing, such as transfers or promotions. You can freeze a position for reasons related to reorganization, budget constraints, or pending decisions on the position's future. You can still make certain data changes to a worker that's tied to a frozen position, such as changing their location. You can't hire into a position when the *Freeze Position* business process is in progress.

The Manage Position Freeze task is part of a business process that can include review and approval steps. Use these tasks when you want to submit freeze and unfreeze actions for approval by one or more administrative roles. Alternatively, you can use the Manage Position Hiring Freeze task to freeze and unfreeze hiring without approval workflow.

To close positions permanently in these organizations, use the Close Position task.

Steps

1. Access the Manage Position Freeze task.
2. Select a Position.
3. Specify a Reason and Date.

   The freeze date is the last date that you can hire or move a worker into the position.

   The unfreeze date is the first date that you can hire or move a worker into the position.
4. Select or clear the Frozen check box.
   - You can't open a job requisition for a frozen position.
   - If you freeze filled positions, you can't restaff as people leave.
   - Frozen unfilled positions become temporarily unavailable for staffing.

Related Information

Concepts

Concept: Workday Docs

Tasks

Close Positions on page 602

Steps: Set Up Workday Docs

Manage Position Hiring Freeze

Prerequisites

Security: *Manage Organization Hiring Freeze* domain in the Staffing functional area.

Context

You can freeze and unfreeze hiring to manage staffing. The position management staffing model supports a hiring freeze at these levels:

- Entire organization.
- Specific positions.

The Manage Organization Hiring Freeze task isn't part of a business process and doesn't include additional steps or approval workflow. Therefore, secure it to roles that don't require approval to freeze and unfreeze positions.

Alternatively, you can use the Manage Position Freeze task to submit freeze and unfreeze actions for approval in position management organizations.

Steps

1. Select an organization.
2. From the related actions menu of the organization, select the type of hiring freeze:
    - For an entire organization, select Staffing > Manage Organization Hiring Freeze.
    - For a specific position, select Staffing > Manage Position Hiring Freeze.
3. Select or clear the Hiring Freeze check box.
   If you freeze filled positions, you can't re-staff as people leave. Frozen unfilled positions become temporarily unavailable for staffing.

Related Information
Tasks
Freeze and Unfreeze Positions on page 601

Close Positions

Prerequisites

Configure the *Close Position* business process and security policy in the Staffing functional area.

Context

You can close unfilled positions to make them permanently unavailable for staffing, with this exception:

- If you use job requisitions, you can't close a position with an open job requisition.

For position management organizations, you can also close positions when you:

- Terminate employees or change their jobs.
- End additional jobs and international assignments.

You can't open or close individual jobs with job management.

The Create EIB task enables you to set up an inbound integration and generate a spreadsheet template from the *Close Position* web service. To close many positions at the same time, use the Create EIB task.

Note: To freeze positions temporarily, use the Manage Position Freeze task.

Steps

1. Access the Close Position task.
2. Select the Position that you want to close.
3. Specify a Close Reason and a Close Date.

   The close date is the last date that you can hire or move a worker into the position.

Result

You can't reopen a closed position. If you want to staff the position later, either rescind the closure or create a position.

Related Information

Concepts

Concept: EIB Template Models and Spreadsheet Templates

Concept: Business Process Management

Concept: Workday Docs

Tasks

Freeze and Unfreeze Positions on page 601

Steps: Set Up Workday Docs

Correct Positions

Prerequisites

The original *Create Position* event must:

- Have a status of *In Progress* or *Successfully Completed*.
- Not have subsequent events that edit, freeze, or close the job or position.

Configure the *Create Position* business process and security policy in the Staffing functional area. Only administrators should have security permission to enter corrections.

Context

You can correct the details of a position with some restrictions:

- You can't correct the supervisory organization.
- If you correct the Availability Date, the new date must be on or before the date of:
  - Subsequent staffing events.
  - Default compensation, organizations, and pay group assignments, if those weren't subprocesses of the original event.
- You can't change the number of positions allocated.
- If the event opened more than 1 position, you can't change the Job Posting Title.
- You can't change the Availability Date to be after the Recruiting Start Date on the job requisition.

Steps

1. Access the Staffing Activity report:
   a) Select the Organization.
   b) Specify the Time Period or Date Range for the original *Create Position* event.
   c) Click OK.
2. From the related actions menu on the Headcount Activity or Staffing Activity event, select Business Process > Correct.
3. Correct the event details as needed.

Result

Corrections to the Availability Date automatically apply to any of these subprocesses within the original business process:

- *Assign Pay Group for Position Restriction*
- *Change Organization Assignments*
- *Request Default Compensation for Position Event*

Workday doesn't update job requisitions with corrections to *Create Position* events.

Concept: When Position Restrictions Are Available to Fill

In position management organizations, a position restriction is available to fill when you have:

- Completed the *Create Position* business process.
- Made the Availability Date on or before the current date.
- Made the Earliest Hire Date on or before the effective date of the *Hire* business process.
- Not filled the position restriction, and don't have an in-progress or completed *Freeze Position* business process.
- Not frozen the supervisory organization.
- Not added an in-progress merit promotion to the position restriction.
- Not proposed the position restriction in an in-progress staffing event.
- Not added a future-dated *Move Worker (By Organization)* or *Move Worker (Supervisory)* business process event to the position restriction.
- No in-progress or completed *Close Position* business processes for the position restriction.
- No in-progress *Job Requisition* business process events for the position restriction.

If you check Require Job Requisitions for all Position Management staffing events in the Edit Tenant Setup - HCM task, you must meet these additional conditions:

- Complete the *Job Requisition* business process.
- Don't fill, freeze, or close the job requisition.
- Have available job openings for the job requisition.

Job Requisitions

Steps: Set Up Job Requisitions

Context

Use job requisitions to track requirements for unfilled jobs or positions in supervisory organizations.

You can use the Create Job Requisition task to create requisitions that contain all necessary information. You can also use the simplified Start Job Requisition task to enable users to create job requisitions. Example: Hiring managers to reduce the recruiter workload.

Steps

1. Access the Edit Tenant Setup - HCM task.
    a) In the ID Sequence Generators section, create, or select an ID definition for new job requisitions.
    b) In the Job Requisitions section, enable job requisitions for your staffing model and configure how Workday automatically populates data.

       Select the Enable Organization Defaults on Create Job Requisition check box if you want to enable organizational defaults into the Create Job Requisition task.

   See Reference: Edit Tenant Setup - HCM.
2. Access the Maintain Event Categories and Reasons task.

   Define categories and reasons for these events:

    - *Close Job Requisition*
    - *Create Job Requisition*
    - *Edit Job Requisition*
    - *Freeze Job Requisition*

   Security: *Set Up: Staffing* domain in the Staffing functional area.
3. Set Up Security for Job Requisitions on page 607.
4. Create Custom Business Processes.

   Configure these business processes:

    - *Job Requisition*
    - *Job Requisition Change*
    - *Freeze Job Requisition*
    - *Close Job Requisition*
    - *Move Job Requisition (Job Management)*

   You can also add a *Create Job Requisition* step to business processes that vacate jobs or positions, such as *Termination* and *End Contingent Worker Contract*.
5. (Optional) Enable users to edit the supervisory organization on a job requisition.

   Access the Configure Optional Fields task to display the Supervisory Organization field for the *Job Requisition Change* business process.
6. (Optional) Enable users to increase the number of positions on position management job requisitions.
    a) Add the *Create Position* step to the *Job Requisition Change* business process.
    b) Give users Modify access to the *Staffing Actions: Job Requisition Positions* domain.
7. (Optional) Configure the Start Job Requisition task on the *Job Requisition* business process security policy.

   Give nonspecialist users, such as hiring managers, access to a simple, intuitive, 1-page task for creating job requisitions.

8. (Optional) Hide or Require Optional Fields.

   Hide or require optional fields for job requisitions on these options in the Pre-Hire Process functional area:

   - *Close Job Requisition*
   - *Freeze Job Requisition*
   - *Job Requisition*
   - *Job Requisition Change*
   - *Mass Close Job Requisitions*

   You can hide or require these fields for the Start Job Requisition task only:

   - Scheduled Weekly Hours
   - Worker Supplier
9. (Optional) Configure Job Requisition Fields.

   You can use the Configure Optional Fields task to hide for all users or hide for specific security groups these fields on the Start Job Requisition task:

   - Replace a worker
   - Add a worker

   If you display the Replace a worker field, you can hide for all users or hide for specific security groups these subsequent fields:

   - Yes
   - No, create a new position for this job.

   If you display the Add a worker field, you can hide for all users or hide for specific security groups these subsequent fields:

   - Create new position.
   - Select an existing unfilled position.
10. Steps: Set Up Mass Actions on Job Requisitions on page 608.
11. Create Job Profiles on page 573.
12. (Optional) Access the Maintain External Recruiting Instructions task.

    When you create or edit a job requisition, you can select 1 of these instructions in the Recruiting Instruction field.

    If you select the Do Not Send to Recruiting System check box, Workday doesn't send the instruction to:

    - External recruiting systems.
    - Third-party recruiting vendors.

    Security: *Set Up: Pre-Hire Process* domain in the Pre-Hire Process functional area.
13. (Optional) Create Contingent Worker Types on page 532.
14. (Optional) Access the Maintain Employee Contract Types task.

    Create employee contract types.

    Security: *Set Up: Employee Contracts* domain in the Staffing functional area.
15. Set Up Worklets.

    Add job requisition Actions to 1 or more of these worklets:

    - Hiring
    - My Team
    - Recruiting

Next Steps

Create and manage job requisitions for your organization.

Related Information
Tasks
Steps: Manage Job Requisitions on page 609
Steps: Set Up Employee Contracts on page 656
Reference
2021R1 What's New Post: Edit Supervisory Organization on Job and Evergreen Requisitions

Set Up Security for Job Requisitions

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration or Manage: Business Process Definitions*
- *Security Configuration*

Context

Set up security to give managers and administrators access to business processes and their content areas.

- Security policies for business processes specify who can complete steps in business processes.
- Domain security policies give you field-level control over who can view or modify data in each content area.

Steps

1. Access the View Business Process Template report.
2. Select the *Job Requisition* business process type, and select OK to advance to the View Business Process Template report.
3. From the related actions of the business process type, select Business Process Policy > Edit.

   Add and review security groups who can perform initiating actions, review steps, and actions for the business process.
4. Select OK, then Done to return to the View Business Process Template report.
5. On the Section Groups tab, review the template sections and their task dependencies to decide which roles need access to each section.
6. Access the Task Security tab.
   a) From the related actions of a security domain, select Domain > Edit Security Policy Permissions.
   b) Grant view and modify permissions to the appropriate security groups.
7. Repeat these steps for the *Job Requisition Change* business process.
8. Access the Activate Pending Security Policy Changes task to confirm your changes.

Next Steps

Access the Template-Driven Business Process Security report to confirm that domain security permissions are aligned for these business processes:

- *Job Requisition*
- *Job Requisition Change*

Related Information

Concepts

Concept: Business Process Templates

Tasks

Activate Pending Security Policy Changes

Steps: Set Up Mass Actions on Job Requisitions

Context

You can close, freeze, or unfreeze up to 10,000 unfilled job requisitions at the same time, reducing manual effort. You can freeze and unfreeze job requisitions to control when they're available for recruiting.

Steps

1. Create Custom Business Processes.

   Configure these business processes:

   - *Mass Close Job Requisitions*
   - *Mass Freeze Job Requisitions*
   - *Mass Unfreeze Job Requisitions*

   Add an *Approval* step if you want to approve mass actions on all selected job requisitions at once.
2. Edit Business Process Security Policies.

   Configure security for these business processes:

   - *Mass Close Job Requisitions*
   - *Mass Freeze Job Requisitions*
   - *Mass Unfreeze Job Requisitions*
3. Activate Pending Security Policy Changes.
4. Copy the Workday-delivered Job Requisition Events Awaiting Approval report.

   You can use the custom report to view and approve in-progress events in bulk for these business processes:

   - *Create Job Requisition*
   - *Edit Job Requisition*

   Confidential job requisitions don't display on this report.

   Security:

   - *Advanced Business Process* segment on the *Mass Operation Management* domain in the System functional area.
   - *Business Process Administration* domain in the System functional area.
   - Configure access to the *Mass Advance* action on the *Job Requisition* business process security policy.
   - *Job Requisition Data* domain in the Pre-Hire Process functional area.
5. Create Business Process Condition Rules.

   Create a condition rule that prevents Workday from generating an approval notification for each requisition that the mass action affects.

   Select these values:

   - *Mass Action of Job Requisition* in the Source External Field or Condition Rule column.
   - *is empty* in the Relational Operator column.

6. Edit Business Processes.

   Add your newly created condition rule to the *Approval* step of these business processes:

   - *Close Job Requisition*
   - *Freeze Job Requisition*
   - *Unfreeze Job Requisition*
7. Configure Workday to automatically unpost jobs.

   Add the *Automatically Unpost Jobs* step to these business processes:

   - *Close Job Requisition*
   - *Freeze Job Requisition*

   See Steps: Set Up Job Postings on page 413.

Result

The mass actions business processes launch the corresponding individual business process for each job requisition that you select. Example: The *Mass Close Job Requisitions* business process launches a *Close Job Requisition* business process for each job requisition.

Next Steps

Access the Mass Action on Job Requisitions report to close, freeze, and unfreeze job requisitions. When you:

- Close or freeze a job requisition, Workday automatically unposts it unless it has an in-progress posting event.
- Unfreeze a job requisition; Workday doesn't automatically repost it.

Security: *Pre-Hire Process: Mass Action on Job Requisitions* domain in the Pre-Hire Process functional area.

To close unfilled positions when closing 1 or more job requisitions, access the Configure Optional Fields task, and enable the Close Unfilled Positions field for these business processes:

- *Close Job Requisition*
- *Mass Close Job Requisitions*

Security: *Set Up: Configure Optional Fields* domain in the System functional area.

Related Information
Tasks
Create Business Process Condition Rules

Steps: Manage Job Requisitions

Prerequisites

Set up job requisitions.

Context

Create and manage job requisitions for your organization. You can:

- Edit job requisitions.
- Copy Open, Closed, or Frozen job requisitions.
- Move job requisitions between job management organizations.
- Freeze or Unfreeze job requisitions.
- Close job requisitions for openings that you no longer plan to fill.

Steps

1. Create and Edit Job Requisitions on page 611.

   You can edit a job requisition at any point until it is filled or closed.

   - You can also edit:
     - Position Management job requisitions for new positions, even with an in-progress fill event.
     - Job Management job requisitions, even with an in-progress fill event.
   - You can't edit:
     - Position Management job requisitions for existing positions if they have an in-progress fill event.
     - Confidential job requisitions for Position Management or Job Management if they have an in-progress fill event.

   If you edit a job requisition that has both filled and unfilled positions, your changes only apply to the unfilled positions.

   Security: Configure the *Job Requisition Change* business process in the Pre-Hire Process functional area.
2. Access the Move Job Requisition task.

   You can move a job requisition that is Open or Frozen.

   You can't move a job requisition that is In Progress.

   - If you move a job requisition with an in-progress hire, Workday completes the hire in the original supervisory organization.
   - If you move a job requisition that has both filled and unfilled openings, only the unfilled openings move to the new organization.

   After you move a job requisition and hire a worker in the new supervisory organization, you can't rescind the *Move Job Requisition (Job Management)* business process.

   Security: Configure the *Move Job Requisition (Job Management)* business process in the Staffing functional area.
3. Access the Manage Job Requisition Freeze task.

   You can freeze and unfreeze job requisitions to control when they're available for recruiting. If you have Workday Recruiting, you can add *Post Job*, and *Unpost Job* steps to the *Freeze Job Requisition* business process to manage job postings.

   Security: Configure the *Freeze Job Requisition* business process in the Pre-Hire Process functional area.
4. Access the Close Job Requisition task.

   You can't reopen a closed job requisition. To restart the process of recruiting and hiring for open positions, create a new job requisition.

   If you've opted in to the Workday 32 – Time Zones feature, the *Close Job Requisition* event isn't effective-dated.

   Note: You can only close a job requisition when the Close Date is after the Recruiting Start Date.

   Security: Configure the *Close Job Requisition* business process in the Pre-Hire Process functional area.

5. Access the Mass Action on Job Requisitions task.

   Close, Freeze, or Unfreeze up to 10,000 unfilled job requisitions at the same time.

   Security:

   - *Indexed Data Source: Job Requisitions* domain in the Pre-Hire Process and Staffing functional areas.
   - *Job Requisition Data* domain in the Pre-Hire Process functional area.
   - *Pre-Hire Process: Mass Action on Job Requisitions* domain in the Pre-Hire Process functional area.

Result

When you update a job requisition that affects role assignments, Workday automatically reassigns related in-progress tasks in My Tasks to the enabled roles.

Next Steps

- View job requisition information with standard reports. For a list, access Workday Standard Reports and select the *Job Change* category.
- If you no longer want to use job requisitions, you can turn them off using the Edit Tenant Setup - HCM task.

Related Information

Tasks

Turn Off Job Requisitions on page 617

Steps: Set Up Job Requisitions on page 604

Create and Edit Job Requisitions

Prerequisites

Configure the *Job Requisition* business process and security policy in the Pre-Hire Process functional area.

Context

You can create job requisitions for unfilled positions in organizations that use position or job management as the staffing model.

For position management organizations, you can create multiple job openings with a single job requisition if the requisition creates a new position. You can have only 1 job requisition for an opening. For job management organizations, you can select multiple openings.

You can't create job requisitions for frozen or closed positions.

When you create a job requisition for an existing position, Workday automatically populates some information from the:

- Position itself, for filled positions.
- Position restrictions, for open positions.

Workday generates a unique ID for the job requisition when you start the *Create Job Requisition* business process. The job requisition name and all related communications display the ID, making it easier to differentiate between job requisitions with the same name. You can search for an in-progress Create Job Requisition event using the automatically generated job requisition ID when you:

- Save the task.
- Submit the task for approval.

You can also search for in-progress Create Job Requisition events using the View In-Progress Job Requisition Events report.

Steps

1. Access the Create Job Requisition or Edit Job Requisition task.

   You can also select Copy > To Create Job Requisition from the related actions of a job requisition.

   a) (Optional) Click the Copy Details from Existing Requisition prompt to select an existing requisition to copy from.
   b) Select the Supervisory Organization.
   c) For position management, specify whether the requisition is for a new or existing position.

      If you want to create multiple job openings with this requisition, create a new position.
   d) Select the Worker Type.
2. On the Recruiting Information section, provide general information for the requisition.

Option	Description
Number of Openings	You can add up to 500 positions.
Spotlight Job	For Recruiting only. Highlights job requisitions and internal job postings with a customizable label. To change the Spotlight Job label, access the Maintain Custom Labels task.
Replacement For	You can select an active or terminated worker if: • You have a requisition in a job management organization. • You have a new position in a position management organization. If the position is or was previously occupied, Workday populates the current or preceding incumbent.
Recruiting Instruction	Instructions for third-party recruiters. These instructions display on the Post Job task.
Recruiting Start Date	For open positions with a previous job requisition, the date must be later than the previous job requisition. For filled positions, the Recruiting Start Date must be after the fill date of the current incumbent.
Target Hire Date	This date must be on or after the Recruiting Start Date.
Target End Date	The employment end date applies to fixed-term employees and contingent workers.
Referral Payment Plan	For Recruiting only. If the job profile you selected already has an associated referral payment plan, the job requisition automatically uses that payment plan. You can change an automatically populated referral payment plan by selecting a different payment plan from the prompt.

Option	Description
Job Application Template	Displays only on the Edit Job Requisition task. Security: *Staffing Actions: Job Requisition Job Application Template* domain in the Staffing functional area.
Use Updated Version of Template	Displays only on the Edit Job Requisition task when the selected job application template has changed. Security: *Staffing Actions: Job Requisition Job Application Template* domain in the Staffing functional area.

3. As you complete the Job section, consider:

Option	Description
Additional Job Profiles	Select additional job profiles for a job requisition. You can select any of these job profiles at later stages in the recruiting and staffing processes.
Primary Job Posting Location	For Recruiting only. Post jobs to a location that is different from the Primary Location. This location is also used to identify the location-related facets on the Find Jobs report. Multiple locations can use the same job posting location. Automatically populates from the Default Job Posting Location field on the Create Location task. If no default job posting location exists, automatically populates from the Primary Location field. If you edit a job requisition, Workday won't automatically populate the Primary Job Posting Location field with data from the Primary Location field. You can only select a location that has *Business Site* or *Job Posting* as the Location Usage.
Additional Job Posting Locations	For Recruiting only. Post jobs to locations that are different from the additional locations. If you edit a job requisition, Workday won't automatically populate the Additional Job Posting Locations field with data from the Additional Location field. You can only select a location that has *Business Site* or *Job Posting* as the Location Usage.
Scheduled Weekly Hours	Populates from a rule when: • You define a working time rule.

Option	Description
	• The data populated on the Maintain Working Time for country task applies the rule. Weekly hours default from the scheduled weekly hours on: • The job requisition that you are copying. • The worker who is in a position, or previously filled a position if you create a job requisition on a position management organization. • The restriction on the existing unfilled position, if you create a job requisition on a Position Management Organization. • The time profile on the primary location set when you create the job requisition.
Questionnaire	For Recruiting only. Workday populates questionnaires using condition rules that you can create. Only Recruiting type questionnaires are available. Candidates complete these questionnaires when they apply to jobs on internal and external career sites. To remove or replace questionnaires, select the Enable Primary or Secondary Questionnaire Removal or Replacement on Evergreen and Job Requisitions check box on the Edit Tenant Setup - HCM task. When editing a job requisition, ensure that the associated questionnaires are active.
Assessments	For Recruiting only. Workday populates assessments using condition rules that you can create. Security: *Staffing Actions Job Requisition Assessments* domain in the Staffing functional area.

4. If the job requisition is for a contingent worker, and you plan to create a purchase order, complete the Cost Information section.

Option	Description
Cost Company	Select the company for the purchase order. The company automatically populates from the: • Supervisory organization for new positions. • Company assignment for existing positions. If no company assignment exists, the company automatically

Option	Description
	populates from the supervisory organization.
Supplier	Select a supplier if applicable. This selection determines whether you pay suppliers or contingent workers.
Spend Category	Select the spend category for financial accounting.
Pay Rate	Specify the maximum pay rate for the contingent worker.
Frequency	Specify the pay frequency. If you want to enter time against the purchase order, you must select *Hourly*.
Maximum Amount	Workday estimates the maximum amount by: • Determining the number of weekdays between the Target Start Date and Target End Date. • Multiplying the weekdays by the Scheduled Weekly Hours divided by 5 (days per week). • Multiplying the calculated hours by Pay Rate. You can override this calculation to better reflect the estimated maximum amount for the contingent worker. This estimate doesn't account for holidays or work schedules.
Worktags	Select worktags to expedite approvals and reporting. Workday automatically populates the cost center and region worktags for the Requester. You can override these worktags or select additional ones.

Note: If you create purchase orders for this contingent worker type, all fields except Supplier and Worktags are required.

Workday automatically transfers this cost information to the contingent worker's contract and purchase order.

5. (Optional) Assign a primary recruiter.

   For Recruiting only. The Assign Roles tab displays if you have access to the *Staffing Actions: Job Requisition Role Assignment* domain in the Staffing functional area.

Result

Workday uses the Maintain Job Application Templates task to determine which template to assign to new requisitions. When you add *Review Job Application Template* as a step to the *Job Requisition* business process, Workday sends the Review Job Application Template task to My Tasks of the assigned security group.

Once the job requisition is approved, its status becomes *Open*. On the Recruiting Start Date, the position becomes available for interview and pre-hire tasks as long as it meets these conditions:

- Its status remains *Open*.

- The Availability Date on the hiring restrictions isn't in the future.
- It's not in a job overlap.

The position is available to fill on or after the Recruiting Start Date.

Next Steps

- To hire a worker, select Hire > Hire Employee from the related actions menu of the job requisition.
- View job requisitions from the Hiring worklet on the Home page.
- Click the Requisitions profile group on a position profile to view all job requisitions associated with a position.
- Add the *Pre-Hire Collective Agreement Details* business process as a subprocess of the *Create Job Requisition* business process to help specify collective agreements and factors when creating the job requisition.

Related Information

Tasks

Steps: Request and Contract Contingent Workers

Steps: Set Up Questionnaires for Recruiting on page 455

Steps: Set Up Primary Recruiters on page 224

Reference

Reference: Default Job Requisition Data on page 620

Reference: Supervisory Organizations on Job Requisitions on page 622

2023R1 What's New Post: Create Job Requisitions for Multiple Existing Positions

Create Job Requisition for Multiple Existing Positions

Prerequisites

Configure the *Job Requisition* business process and security policy in the Pre-Hire Process functional area.

Security:

- *Staffing Actions: Job Requisition Positions* in the Staffing functional area.
- *Set Up: Configure Optional Fields* domain in the System functional area.

Context

You can create a single job requisition for multiple existing positions that are part of the same supervisory organization enabling you to manage.

- High-volume hiring jobs. Example: Seasonal sales staff.
- High attrition jobs. Example: Warehouse operatives.

Steps

1. Access the Configure Optional Fields task.
   a) On the Functional Area prompt, select *Job Requisition*.
   b) Delete these rows:
      - *Additional Positions*
      - *For Multiple Positions*
2.
3. Access the Create Job Requisition task.
4. Select the For Multiple Existing Positions option.
5. Select a Defaulting Position.

6. Click OK.
7. (Optional) In the Recruiting Information section, you can add up to 99 filled and open positions as Additional Positions.

   You can't add positions that have a *Check Budget* step configured on the *Job Requisition* business process.

   When you save the Create Job Requisition task for later, Workday doesn't display a warning message if any of the positions selected are no longer available when you resume the task.

Result

After submitting a job requisition, you can’t add or remove positions, however, you can edit other details on the job requisition.

Related Information
Tasks
Hide or Require Optional Fields
Reference
2023R1 What's New Post: Create Job Requisitions for Multiple Existing Positions

Turn Off Job Requisitions

Prerequisites

Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

Context

If you don't want to use requisition processes to support staffing, you can disable job requisitions for staffing organizations that use:

- Job management.
- Position management.

Note: You can't disable job requisitions for position management if you use commitment accounting for any company in your tenant.

Turning off job requisitions for either a position management or job management organization causes these changes for the affected organizations:

- You can no longer initiate the *Job Requisition* business process.
- Open (nonfrozen) positions become available for recruiting and hiring on their availability date. Previously filled positions become available 1 day after the position vacates.
- You no longer need open job requisitions to fill open positions. Workday only validates against position restrictions.
- If you rescind an event that filled an open position, the related job requisition reopens and becomes effective. To apply position restrictions to future hiring actions, close the job requisition.
- Corrections to events that filled open positions must comply with the job requisition requirements that were in place when the event occurred.
- You can now edit position restrictions for all positions. Your changes to position restrictions have no impact on any in-progress events that fill positions based on job requisitions.

Steps

1. Access the Edit Tenant Setup - HCM task.
2. For the Enable Job Requisitions for Position Management field, select None of the above.
3. Clear the Enable Job Requisitions for Job Management check box.

Result

Turning off job requisitions doesn't impact in-progress events that are based on job requisition hiring restrictions, including transfers and other job changes.

You have continued access to the:

- *Job Requisition Change* business process, enabling you to support or correct staffing events that fill positions.
- *Close Job Requisition* business process, enabling you to close open requisitions.

The View Supervisory Organization report changes:

- The Staffing tab displays all open, nonfrozen positions that have reached their availability date.
- The Unavailable to Fill tab displays open positions before their availability date, frozen positions, and positions with in-progress events.

Next Steps

When you disable job requisitions for either position management or job management for the affected organizations:

- Close or rescind any open job requisitions.
- Cancel any in-progress *Job Requisition* or *Job Requisition Change* events.

Related Information
Tasks
Steps: Manage Job Requisitions on page 609

Concept: Translated Job Requisitions

You can translate job requisitions into multiple languages for the same position, enabling better support for global recruiting.

Base Language for Job Requisitions

The base language is the preferred language of the person who creates the job requisition.

Example: Jacqueline, whose preferred language is French, creates a job profile. The base language of the job profile is French. Elizabeth, whose preferred language is English, creates a job requisition using the French job profile. The base language of the job requisition is English.

Viewing Translated Job Requisitions

Workday automatically displays the job requisition in your preferred language, if translations are available.

Workday displays translated job postings on external career sites for the target language.

Editing Job Requisitions

If you edit a job requisition, and translations exist for your preferred language, Workday saves the changes to the translations. If translations don't exist, Workday saves the changes to the base language.

Example: Paul, whose preferred language is French, edits a job requisition that has English as its base language. Workday saves these edits to the French translation. The English job requisition will remain unchanged.

Elizabeth, whose preferred language is English, can update the English job requisition.

Translating Job Requisitions

To translate a job requisition, select Translation > Translate Instance from the related actions menu of the job requisition. This action is secured to the *Data Translation* domain in the System functional area.

Related Information

Tasks

Steps: Manage Translations

Reference: Job Requisition Features for Recruiting and HCM

Workday enables HCM customers to access job requisition functionality, but some features require access to Workday Recruiting. This table displays the job requisition features that Workday delivers to non-Recruiting customers:

Feature	Available to Non-Recruiting Customers	Description
Assessments	No	You can request candidates to complete recruiting assessments.
Assignable Roles	Yes	You can assign positions to organization roles. You can then assign the users in these positions to a job requisition.
Background Checks	Yes	You can track background checks for: • Contingent workers. • New hires. • Pre-hires. • Workers.
Close Job Requisitions Create/Edit Job Requisitions Freeze Job Requisitions Move Job Requisitions	Yes	You can: • Close job requisitions when you've filled the positions or no longer need a job requisition. • Create and update job requisitions. • Freeze job requisitions to control when they're available for recruiting. • Move job requisitions that are Open or Frozen. You can't move In-Progress job requisitions.
Compensation Details	Yes	You can configure Workday to populate compensation details on job requisitions.
Confidential Requisitions	No	You can display sensitive job requisitions to a set of users.
Create Evergreen Requisitions	No	You can create requisitions that remain constantly open.
Job Application business process	No	You can use Workday-delivered stages to configure the path that candidates follow during the recruiting process.

Feature	Available to Non-Recruiting Customers	Description
Job Postings	No	You can advertise open jobs on internal and external career sites. You can also use the Additional Job Description field on the Create Job Posting Template and Edit Job Posting Template tasks.
Mass Actions	Yes	You can close and freeze up to 10,000 unfilled job requisitions at the same time.
Questionnaires	No	You can send questionnaires to candidates, recruiters, and interviewers in Workday.

Related Information

Concepts

Setup Considerations: Job Requisitions for Recruiting on page 214

Tasks

Steps: Set Up Job Requisitions on page 604

Reference: Default Job Requisition Data

Workday populates data on each section of the Create Job Requisition task based on your settings on the Edit Tenant Setup - HCM task and business process configuration.

When you use the Start Job Requisition task, Workday populates the fields not included on the task in the background, and displays them on the job requisition after it's created.

Job Requisition Section	Populated Data
Job Details	If you select Defaulting Behavior for Position Management Job Requirements, Workday uses the position restrictions or the most recent filled position for these fields: • Job Profile • Primary Location • Scheduled Weekly Hours • Time Type • Worker Sub-Type • Worker Type If you select the Default Job Description and Job Description Summary from Job Profile setting, Workday populates those fields from the job profile. Workday doesn't display the Recruiting Start Date field on the Start Job Requisition task, and populates the date in the background for: • New positions. Workday sets it to the date you're creating the job requisition.

Job Requisition Section	Populated Data
	• Existing positions. If the selected position is linked to a closed job requisition, Workday sets the Recruiting Start Date to 1 day after the close date of the job requisition. If the selected position was previously filled, Workday sets the Recruiting Start Date to 1 day after the last filled date for the position.
Compensation Details	Workday automatically populates these details when you configure: • Compensation on the position. • A *Request Requisition Compensation* step on the *Job Requisition* business process. Otherwise, Workday uses eligibility rules to populate this section.
Questionnaire	Workday automatically populates questionnaires using condition rules you create using the Maintain Job Requisition Questionnaire Defaults task. If you update any section of the job requisition before submitting it, Workday runs the condition rules again.
Assessments	Workday automatically populates assessments using condition rules you create using the Maintain Job Requisition Assessment Defaults task. If you update any section of the job requisition before submitting it, Workday runs the condition rules again.

Organization Data	Workday automatically populates these details when you select the Enable Organization Defaults on Create Job Requisition option. The source of this data depends on your staffing model:
	• Job Management: Workday uses data from the supervisory organization.
	• Position management: Workday uses data differently for new and existing positions:
	  • For new positions, Workday uses organization data and the resulting position restrictions from the supervisory organization.
	  • For existing positions, Workday uses organization data based on the Defaulting Behavior for Position Management Job Requisitions tenant setting.
	When you select:
	• Default from most recent filled position on Create Job Requisition, Workday populates data from the filled position.

Job Requisition Section	Populated Data
	• Default from Position Restriction on Create Job Requisition, Workday populates data from the unfilled position restrictions.

Related Information

Tasks

Create and Edit Job Requisitions on page 611

Reference

Reference: Default Organization Assignments on page 924

Reference: Edit Tenant Setup - HCM

2022R2 What's New Post: Sync Scheduled Weekly Hours Between Job Requisitions and Position Restrictions

Reference: Supervisory Organizations on Job Requisitions

Most job requisitions display the supervisory organization that you've created them for, including:

- Job requisitions for job management organizations.
- Confidential job requisitions for position management organizations.
- Nonconfidential job requisitions for position management organizations, if all positions are in the same supervisory organization.

When a nonconfidential job requisition has multiple positions in different supervisory organizations, Workday determines which supervisory organization to display using these conditions:

Condition	Supervisory Organization
Can you fill a position from the related actions menu of the job requisition?	Yes: Use the supervisory organization from the first available position, which has the lowest position restrictions ID. No: Go to next condition.
Does the job requisition have an open position that your organization has never filled?	Yes: Use the supervisory organization for that position. This position can be new or frozen. No: Go to next condition.
Does the job requisition have 1 or more positions that your organization has filled in the past?	Yes: Use the supervisory organization for the position with the latest hire date. Workday considers the organization for the most recent hire as the most likely one for the job requisition. No: Use the supervisory organization that you created the job requisition for.

Business Process Impacts

When the *Move Workers to New Manager* business process completes, Workday moves workers into the organization of their new manager. Workday displays the transaction as a *Move Worker (Supervisory)* event in the worker's history. Related job requisitions reflect the new supervisory organization for the workers.

Related Information

Tasks

Move Workers to New Managers on page 920

Example: Add Custom Fields to Job Requisitions

This example demonstrates how to add effective-dated custom fields to job requisitions.

Context

As an HR administrator, Bill needs to track the different types of job requisitions their organization creates during recruitment. Bill needs to create a custom list for the requisition types and add a custom field to the job requisition business process to display the different requisition types.

Steps

1. Access the Create Custom Field Type report.

   Click the List Custom Field Type.
2. On the Create Custom List page add these values:

Field	Value
Custom Field Type Name	Requisition Type List
Web Service Alias	(This field will populate automatically)

   On the List Values section, add 3 rows and enter these values to the List Value Name section:

   - Student
   - Professional
   - Executive
3. Click OK and Done.
4. Access the Create Custom Object task and enter these values:

Field	Value
Workday Object	*Job Requisition (Effective Dated)*
Custom Object Name	Requisition Type
5. Click OK.
6. Click Next.
7. In the Field Definitions section, click Add on the Proposed New Fieldsand enter these values:

Field	Value
Field Label	Requisition Type
Field Type	*Requisition Type List*
8. Click Next.
9. In the Permissions section, select the Domain *Job Requisition Data*.
10. Click Next.
11. Click OK and Done.
12. From the related actions menu of the *Job Requisition Data* domain, select Domain > Edit Security Policy Permissions.
13. In the Report/Task Permissions section, click the Modify check box for the *HR Administrator*.
14. Click OK and Done.
15. Click OK and Done.
16. Access the *Edit Job Requisition Additional Data* business process.

17. From the related actions menu of the *Edit Job Requisition Additional Data* business process, select Business Process Policy > Edit.
18. On the Who Can Start the Business Process section, add *HR Administrator* to the Security Groups for the *Edit Job Requisition Effective-Dated Custom Object* Initiating Action.
19. Access the Activate Pending Security Policy Changes task.

    Add a comment describing the security domain changes that you have made.
20. Click OK and Done.
21. From the related actions menu of the *Edit Job Requisition Additional Data* business process, select Business Process > Edit Definition.
22. Add a row to the Business Process Steps section and enter these values:

Field	Value
Type	*Edit Additional Data*
Specify	*Requisition Type*
Group	*HR Administrator*

23. Click OK and Done.
24. Access the *Job Requisition* and *Job Requisition Change* business processes, add a row to the Business Process Steps section, and enter the same values as in the preceding step.

Result

The HR administrator can now enter values for the Requisition Type field in 2 ways:

- When creating or editing a job requisition.
- By selecting Additional Data > Edit Effective-Dated Custom Object from the related actions menu of an existing job requisition.

Related Information
Tasks
Create Custom Field Types
Create and Edit Custom Object Definitions
Create Custom Lists

Pre-Hire Tracking

Steps: Set Up Pre-Hire Tracking

Prerequisites

Security: *Set Up: Pre-Hire Process* domain in the Pre-Hire Process functional area.

Context

A pre-hire is someone you track before employment. You can create pre-hire records, provide sourcing and contact information, and track the pre-hire process. All employees have an active pre-hire record after you've hired or terminated them. You can tie this pre-hire record to open positions for internal transfers or rehires.

If you want to use a different term for pre-hires, access the Maintain Custom Labels task to override this term.

Steps

1. Access the Maintain Pre-Hire Evaluation Methods task.

   These methods describe how you evaluate pre-hires for open positions. Example: *Reviewed Resume*, *Phone Interview*, *Final Interview*.
2. Access the Maintain Pre-Hire Evaluation Recommendations task.

   These recommendations describe the proposed next step to take for a pre-hire. Example: *Make Offer*, *Postpone*, *Decline*.
3. Maintain Recruiting Sources on page 272.

   Sources describe how a pre-hire came to the attention of the company. You define custom categories, and add as many sources to a category as you need. Example: Create an *Advertising* source category containing the *Internet*, *Newspaper*, and *Campus Fliers* sources.
4. Access the Maintain Pre-Hire Statuses task.

   Statuses display a person's current position in the pre-hire process, such as *Pre-Screen*, *Interview*, or *Make Offer*. The order controls the sequence in which each status occurs. Example: You could have a status of *Interview* from when an interview is scheduled until a recommendation is made.
5. (Optional) Hide or Require Optional Fields.

   Hide or require pre-hire contact information fields on the *Create Pre-Hire*, *Edit Pre-Hire*, *Hire*, and *Contract Contingent Worker* business processes. You can hide or require fields for each of the functional areas based on your organization's needs.

   If you don't require any of the pre-hire contact information fields, at least 1 address, phone number, or email address will be mandatory when your users create a pre-hire.

   To hide the pre-hire contact information fields while creating a pre-hire as part of the hire process, you need to hide the fields on the Hire functional area.

Next Steps

Workday provides a number of standard reports to help you manage pre-hires. For a list, access Workday Standard Reports and select the *Pre-Hire Process* category.

Related Information

Concepts

Concept: Rehire Eligibility on page 712

Tasks

Create Custom Labels

Steps: Manage Pre-Hire Tracking

Prerequisites

Set up pre-hire tracking.

Context

Create pre-hires, track their information, and associate them with open positions. If necessary, you can also delete pre-hire records from Workday.

Steps

1. Create Pre-Hires on page 626.

   Create pre-hires individually or load groups of pre-hires with a web service.
2. Consider Pre-Hires for Positions on page 628.

   Associate a pre-hire with a job or position, attach a resume, and assign a status to the application process.

3. Edit Personal and Contact Information for Pre-Hires on page 627.
4. Access the Manage Pre-Hires for Job task.

   View a list of all pre-hires for a particular job, including their status, the last comment added, and who made the comment. You can also update the status and add a comment.

   Security: *Manage Pre-Hire Process: Consider Pre-Hires* domain in the Pre-Hire Process functional area.
5. Access the Enter Interview Results for Pre-Hire task.

   Enter interview results for a pre-hire for a specific position. You can also view other interviewers' responses to the pre-hire.

   Security: *Manage Pre-Hire Process: View Pre-Hire Interviews* or *Manage Pre-Hire Process: Enter Pre-Hire Interviews* domain in the Pre-Hire Process functional area.
6. Steps: Set Up Background Checks for Pre-Hires and Workers on page 790.
7. (Optional) Access the Change Hire Eligibility Status task.

   Identify pre-hires who are ineligible for hire. These pre-hires won't display on the Contract Contingent Worker or Hire Employee tasks. You can view these pre-hires on the Pre-Hires Ineligible for Hire report.

   Security: *Manage Pre-Hire Process: Hire Eligibility Status Comment* domain in the Pre-Hire Process functional area.
8. Delete Pre-Hires on page 629.

Related Information

Concepts

Concept: Rehire Eligibility on page 712

Tasks

Steps: Purge Person Privacy Data

Create Pre-Hires

Prerequisites

- Set up Pre-Hire tracking options. See: Steps: Set Up Pre-Hire Tracking.
- Security: *Manage Pre-Hire Process: Manage Pre-Hires* domain in the Pre-hire Process functional area.

Context

Before you can hire a worker, the person must exist as a pre-hire in Workday. You can create a pre-hire during the hire process. You can also create pre-hires earlier and track their progress through the process of interviews and evaluation.

Note: A separate integration bypasses this task, enabling you to load pre-hires from a spreadsheet with the Enterprise Interface Builder (EIB).

Steps

1. Access the Create Pre-Hire task or, as part of a hire, click Create a New Pre-Hire in the Hire Employee or Contract Contingent Worker tasks.

   The fields on the Address tab are country-specific. Example: The United States have a required State field and the United Kingdom has an optional County field.
2. Select a Source.

   To create a new source, access the Maintain Recruiting Sources task.
3. Select 1 or more workers in the Referred by field.

   You can only select workers who have Workday accounts.

4. (Optional) Select the Allow Duplicate Name check box to be able to create pre-hires with the same first and last name.

   Workday doesn't identify duplicate names if the pre-hires have different countries or aren't eligible for hire. Example: If a pre-hire is already hired or marked for deletion.
5. On the Legal Name Information tab, enter the pre-hire's country and legal name.

   You can optionally select Enter Western Script to enter the pre-hire's name in Western script if:

   - The pre-hire's country uses a local script.
   - Local script names and addresses are enabled and Western script names and addresses are optional for the pre-hire's country on the Edit Tenant Setup - Global task.
6. On the Contact Information tab, specify values for the required fields.

Next Steps

Access the:

- Edit Pre-Hire Profile task to edit the source, referral, pre-hire pool, or comment.
- Pre-Hire Names report to add a preferred name.

Related Information
Concepts
Concept: Country-Specific Information, Locales, and Languages
Tasks
Steps: Set Up Pre-Hire Tracking on page 624
Steps: Set Up EIBs Using Templates from Web Service Operations
Reference
Reference: Edit Tenant Setup - Global

Edit Personal and Contact Information for Pre-Hires

Prerequisites

- Set up personal, contact, and ID information in Workday.
- In the Maintain Localization Settings task, enable pre-hire information tracking by country. Activate localizations in the *Personal Information* area:
  - The ID Info (Pre-Hire) localization makes the Edit ID Information for Pre-Hire task available for pre-hires in the selected countries.
  - The Personal Information (Pre-Hire) localization makes the Edit Personal Information for Pre-Hire task available for pre-hires in the selected countries.

Context

Add or update IDs, personal information, and contact information for pre-hires. Workday uses this information as the pre-hire's ID, personal, and contact information if you hire or contract them as a contingent worker. You can only edit personal information and IDs for a pre-hire if you consider them for 1 or more positions.

Note: Public contact information displays in directories and listings for all users. HR administrators can see all contact information even if it's not public. To see which security groups can view public and private contact information, check the domains in the Contact Information functional area.

Steps

1. Access the Edit Pre-Hire Contact Information task.

   Supply values for all the required fields when you create a pre-hire. After you create a pre-hire, use this task to edit their contact information.

   Security: *Pre-Hire Data: Contact Information* domain in the Pre-Hire Process functional area.
2. Access the Edit Personal Information for Pre-Hire task.

   Pre-hire personal information is used for regulatory and compliance reporting. You can track personal information for a pre-hire if:

   - Workday can determine the location of the considered position.
   - The Pre-Hire Personal Information localization is enabled for that country.

   Workday determines the position location from the primary location of the supervisory organization containing that position. If you're considering the pre-hire for multiple positions, Workday displays fields and values for all position locations.

   Security: *Pre-Hire Personal Data: Personal Information* domain in the Pre-Hire Process functional area.
3. Access the Edit ID Information for Pre-Hire task.

   Social Security Number is a national ID type. If you hire someone, you must enter a tax ID.

   Security: *Pre-Hire Personal Data: ID Information* domain in the Pre-Hire Process functional area.

Next Steps

After hiring, you can’t add or update personal information on the pre-hire record. Edit personal information on the employee record or access the Edit Personal Information task.

Related Information
Tasks
Steps: Set Up Pre-Hire Tracking on page 624
Steps: Set Up Contact Information on page 74
Steps: Set Up Personal Information Fields on page 36
Steps: Set Up Workday IDs on page 66
Steps: Set Up Identification Documents on page 67

Consider Pre-Hires for Positions

Prerequisites

- Set up pre-hire tracking options.
- Create pre-hires.
- Security: *Manage Pre-Hire Process: Consider Pre-Hires* domain in the Pre-Hire Process functional area.

Context

Manage the pre-hire process by tracking information including:

- Organizations considering the pre-hire.
- Applicable jobs or positions within those organizations.

You can also designate interviewers and track the status of the pre-hire. Pre-hires can include current workers who are applying for other positions in your organization.

Steps

1. Access the Edit Pre-Hire Profile task.

2. As you complete the task, consider:

Option	Description
Considered for	Select the position you're considering the pre-hire for. You can consider pre-hires for multiple positions. You can select a position that includes a worker's name. Workday assumes that you're hiring a replacement for a current occupant who will vacate the position at a future date. Note: You don't have to hire into a listed position, but you can't delete a position from this list.
Interviewers	Select at least 1 interviewer. Workday sends interviewers a request to enter interview feedback.
Status	Specify the current position of the person in the pre-hire evaluation process. To view the status of 1 or more pre-hires for the same position, access the Manage Pre-Hires for Job task.

Related Information

Tasks

Steps: Set Up Pre-Hire Tracking on page 624

Delete Pre-Hires

Prerequisites

Security: *Manage Pre-Hire Data: Mark Pre-Hires for Deletion* and *Manage Pre-Hire Data: Delete Pre-Hires* domains in the Pre-Hire Process functional area.

Context

Deleting a pre-hire is irreversible and involves 2 separate tasks. You can filter the list of pre-hires by location, pre-hire pools, the positions for which they're being considered, statuses, and dates.

If you search for pre-hires by country or country region, Workday determines their location based on either the:

- Country of their home address.
- Primary location of the supervisory organization that contains the position for which they're being considered.

The location search results don't display pre-hires that:

- Aren't linked to positions.
- Have no home address listed.

Note: After a worker is hired, you can't delete that worker's pre-hire record.

Deleting pre-hires doesn't remove all of their information from Workday. To remove their personally identifiable information from Workday completely, you must use the Purge Person Data task to purge the terminated worker associated with the pre-hire record. You can't purge active workers.

Steps

1. Access the Mark Pre-Hires for Deletion task.

   Find the pre-hires you want to delete and select the Mark for Deletion check box. The task doesn't display pre-hire records if:

   - The worker was hired or contracted.
   - The worker was terminated or their contract ended.
   - The *Hire* or *Contract* event is in progress.
   - The pre-hire records were merged.
2. Access the Delete Pre-Hires task.

   Select the Delete check box for the pre-hires you want to delete.

Related Information
Tasks
Steps: Set Up Pre-Hire Tracking on page 624
Steps: Purge Person Privacy Data

Reference: Security Groups for Pre-Hires

Workday provides these security groups that manage the onboarding process for pre-hires:

- Pre-Contingent Worker as Self
- Pre-Employee as Self

If you want users to view all unconstrained pre-hires on the Edit Pre-Hire Profile task and the View Pre-Hire report, provide them with access to the *View Pre-Hire* domain.

Workday also delivers these security groups that enable employees and contingent workers to access employee self-service:

- Contingent Worker as Self
- Employee as Self

Workday assigns future-dated completed hires to Pre-Employee as Self or Pre-Contingent Worker as Self instead of:

- All Contingent Workers
- All Employees
- Contingent Worker as Self
- Employee as Self

Access to Benefit Enrollment for Pre-Hires

You can configure access to benefit enrollment for your pre-hires:

Access	Action
No access to Workday before start date.	Add these security groups to the *Change Benefits for Life Event* business process. • Employee as Self • Contingent Worker as Self
Access to both Workday and benefit enrollment before start date.	Add these security groups to the *Change Benefits for Life Event*: • Contingent Worker as Self • Employee as Self • Pre-Contingent Worker as Self

Access	Action
	• Pre-Employee as Self
Access to Workday only.	Configure a step delay for enrollment to employee self-service benefits.

Related Information
Tasks
Convert Contingent Workers to Employees on page 735

Employment Agreements

Setup Considerations: Employment Agreements

You can use this topic to help make decisions when planning your configuration and use of employment agreements. 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

In Workday, you can use employment agreements to outline and negotiate conditions of employment for internal and external candidates.

Business Benefits

You can easily track, report, and negotiate employment agreement details for candidates. Employment agreement details then populate during the *Hire*, *Change Job*, and *Additional Job* business processes. You can also autocomplete approved employment agreement data from job applications in relevant business processes.

Use Cases

You can use the employment agreement functionality to:

- Record and report on the expected duration of the candidate's contract.
- Record and report on conditions of the employment such as compensation, notice periods, probation periods, and collective agreements.
- Renegotiate the conditions of employment and track the renegotiation changes.
- Generate documents for the employment agreement.

If you use employment agreements as part of the Recruiting workflow, you can also:

- Complete employment agreements in bulk with Worksheets during high-volume times of recruitment.
- Autocomplete approved employment agreement data in other business processes.

Questions to Consider

Questions	Considerations
How can you complete employment agreement tasks in a guided view?	You can configure the *Employment Agreement* consolidated template to complete tasks in a guided view instead of completing them separately. When you consolidate the business process template, you must add validation rules for the subprocesses on the *Initiation* step of the *Employment Agreement* business process. You also can't add condition rules on any of the business process steps.
As a Recruiting customer, can you complete employment agreements from job applications in bulk?	You can configure task consolidation to complete employment agreement tasks in bulk using Worksheets by generating a workbook, enabling you to manage high-volume recruitment more flexibly. You can consolidate a maximum of 100 employment agreement events in a workbook.
How can you configure additional fields required in certain countries?	You can configure localized fields on the Maintain Localization Settings task for subprocesses of the *Employment Agreement* business process to: • Track additional fields in certain countries to comply with local regulatory requirements. • Enable rules for components such as notice periods and probation periods to populate data.
How can you populate employment agreement data?	You populate data in employment agreements by configuring eligibility rules for compensation, notice periods, and probation periods. Populating data can reduce manual effort and increase accuracy. Compensation data can populate differently from notice periods and probation periods. We recommend you review how compensation data populates in employment agreements. You can configure condition rules and data fields on the Maintain Staffing Field Defaults task to populate these fields on an employment agreement during recruiting: • Hire Date • Contract End Date
As a Recruiting customer, how can you autocomplete employment agreements?	You can configure the relevant business process definition to autocomplete approved employment agreement data from job applications on these business processes: • *Add Additional Job* • *Change Job*

Questions	Considerations
	• *Hire*
Do you want to send other documents to candidates together with the employment agreement?	You can configure the *Add Documents* step to the Offer business process. This action step enables you to attach documents before sending an employment agreements. Example: Terms and Conditions.
Do you want to make corrections to an Employment Agreement after a candidate accepts?	If you correct details on an Employment Agreement after a candidate has accepted, you can regenerate a new Employment Agreement document using the: • Regenerate Employment Agreement Documents task. • Related actions menu of a completed Employment Agreement event.

Recommendations

To populate data in the most efficient order, Workday recommends that you configure the steps on the *Employment Agreement* business process definition and consolidated template in this order:

- *Initiate Pre-Hire Contract Details*
- *Initiate Pre-Hire Collective Agreement Details*
- *Initiate Pre-Hire Probation Period Details*
- *Initiate Pre-Hire Notice Period Details*
- *Propose Compensation Offer/Employment Agreement*
- *Request Stock Grant Offer/Employment Agreement*
- *Request One-Time Payment Offer/Employment Agreement*

We also recommend that you complete these steps for employment agreements in this order.

When you configure the *Hire Employee* initiating action on the *Hire* business process, we recommend that you hire directly from the employment agreement. The employment agreement data then populates on the *Hire* business process.

To propose establishments in employment agreements, Workday recommends that you select the Allow Establishment on Employment Agreement/Offer check box on the Configure Establishment by Country task.

To keep data consistent, Workday recommends that you make any changes required to the employment agreement before initiating the *Hire* business process. If you change data during the *Hire* business process, these changes won't update the approved employment agreement.

Requirements

Employment agreements require a job requisition for the position and a pre-hire record.

Limitations

You can only consolidate review events in Worksheets for these subprocesses on the *Employment Agreement* business process:

- *Propose Compensation Offer/Employment Agreement*
- *Request One-Time Payment Offer/Employment Agreement*
- *Request Stock Grant Offer/Employment Agreement*

You can't consolidate any other approval or review events for employment agreements.

Tenant Setup

No impact.

Security

Domains	Considerations
Pre-Hire Data: Employment Agreement in the Pre-Hire Process and Recruiting functional area.	Users secured to this domain and its subdomains can view or modify these types of data: • Business Title • Collective Agreement • Employee Contract • End Date • Location • Notice Period • Probation Period • Scheduled Weekly Hours • Start Date
Add Compensation Plans in the Core Compensation functional area.	Users secured to this domain and its subdomains can view or modify compensation plan data.
Compensation Change: Guidelines in the Core Compensation functional area.	Users secured to this domain can view or modify compensation grade data, grade profile data, and step assignments.
Add Compensation Management Plans in the Advanced Compensation functional area.	Users secured to this domain and its subdomains can view or modify bonuses, merit plans, and stock plans.

Business Processes

Configure these business processes and business process policies:

Business Processes	Considerations
Employment Agreement	Enables you to maintain employment agreements for candidates as a standalone business process if you're not using employment agreements as part of the Recruiting workflow.
Job Application	You can configure *Employment Agreement* as a subprocess of the *Job Application* business process to maintain employment agreements for candidates as part of the Recruiting workflow.
Pre-Hire Collective Agreement Details	Enables you to maintain collective agreement details for the *Initiate Pre-Hire Collective Agreement Details* step on the *Employment Agreement* business process.
Pre-Hire Contract Details	Enables you to maintain contract details for the *Initiate Pre-Hire Contract Details* step on the *Employment Agreement* business process.

Business Processes	Considerations
Pre-Hire Notice Period Details	Enables you to maintain notice period details for the *Initiate Pre-Hire Notice Period Details* step on the *Employment Agreement* business process.
Pre-Hire Probation Period Details	Enables you to maintain probation period details for the *Initiate Pre-Hire Probation Period Details* step on the *Employment Agreement* business process.
Propose Compensation Offer/Employment Agreement	Enables you to maintain compensation details for the *Propose Compensation Offer/Employment Agreement* step on the *Employment Agreement* business process.
Request One-Time Payment Offer/Employment Agreement	Enables you to maintain one-time payment details for the *Request One-Time Payment Offer/Employment Agreement* step on the *Employment Agreement* business process.
Request Stock Grant Offer/Employment Agreement	Enables you to maintain stock grant details for the *Request Stock Grant Offer/Employment Agreement* step on the *Employment Agreement* business process.

Reporting

You can use the Find Employment Agreements report to display all employment agreements by supervisory organization.

Integrations

You can build an inbound EIB integration based on the *Employment Agreement* web service to upload employment agreement data from job applications in bulk.

Connections and Touchpoints

If you're using employment agreements as part of the Recruiting workflow, employment agreements interact with HCM Core and Compensation.

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: Autocomplete Staffing Events on page 519

Tasks

Steps: Set Up Task Consolidation for Employment Agreements on page 637

Reference

FAQ: Compensation Defaulting on page 1039

Steps: Set Up Employment Agreements

Context

Set up employment agreements to streamline your global pre-hire negotiation and hire processes. In addition to job requisition data, employment agreements can include these types of data:

- Collective agreement
- Compensation
- Contract details
- Establishment
- One-time payment
- Notice period
- Probation period
- Stock grant

Steps

1. Edit Domain Security Policies.

   Configure the security policies for the *Pre-Hire Data: Employment Agreement* domain and its subdomains in the Pre-Hire Process and Recruiting functional area.
2. Edit Business Process Security Policies.

   Configure the *Employment Agreement* business process policy.

   Configure the business process policies for the *Employment Agreement* subprocesses you want to configure:

   - *Pre-Hire Collective Agreement Details*
   - *Pre-Hire Contract Details*
   - *Pre-Hire Probation Period Details*
   - *Pre-Hire Notice Period Details*
   - *Propose Compensation Offer/Employment Agreement*
   - *Request One Time Payment Offer/Employment Agreement*
   - *Request Stock Grant Offer/Employment Agreement*

   You can only configure these subprocesses on the *Employment Agreement* business process.

   To initiate a hire from the related actions menu of an employment agreement, configure the *Hire Employee* initiating action for employment agreements on the *Hire* business process.
3. Edit Business Processes.
   a) Access the *Employment Agreement* business process.
   b) Add steps for the relevant subprocesses.
   c) (Optional) Configure the *Generate Document* and *Review Document* steps to generate and view employment agreement documents in PDF format.
   d) Add *Make Employment Agreement Decision* as the completion step.
4. (Optional) Access the View Business Process Template report.

   From the related actions of the Employment Agreement business process type, select Business Process > Configure Consolidated Template to start tasks from configured subprocesses at the same time.

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
5. If you configure any of these subprocesses, set up their components so that the appropriate data displays on the *Employment Agreement* business process.

Option	Description
Collective agreements	Steps: Manage Collective Agreements on page 647
Compensation	Steps: Set Up the Compensation Framework

Option	Description
Contract details	Steps: Set Up Employee Contracts on page 656
Probation Periods	Steps: Manage Probation Periods on page 671
Notice Periods	Steps: Manage Notice Periods on page 683
One-time payments	Create One-Time Payment Plans
Stock grants	Steps: Set Up Stock Plans

6. (Optional) Maintain Localization Settings on page 144.

   Configure these localized fields to display on the *Employment Agreement* business process:

   - *Paid FTE (Worker)*
   - *Working FTE (Worker)*
7. (Optional) Access the Configure Establishment by Countrytask.

   To display the Establishment prompt on the Details section of the *Employment Agreement* business process, select the Allow Establishment on Employment Agreement/Offer check box.

   If you propose an establishment in an employment agreement, the proposed establishment populates in applicable staffing events.
8. (Optional) Hide or Require Optional Fields.

   If you configured the Generate Document step, we recommend that you hide the *Document Language* field. The Generate Document step sets the document language based on the locale and language settings of the user. Hiding the *Document Language* field simplifies the user experience.
9. Activate Pending Security Policy Changes.

   Hide or require employment agreement fields by role in the Staffing and Pre-Hire Process functional areas.

Next Steps

Access the Template-Driven Business Process Security report to confirm that the *Employment Agreement* business process and domain security permissions are correct.

If you want employment agreements in your Workday Recruiting workflow, add the *Employment Agreement* business process as a step on the *Job Application* dynamic business process.

If you want to renegotiate an employment agreement on the *Job Application* business process, add the *Employment Agreement* business process a second time. Workday recommends that you use a label override to distinguish the initial employment agreement step from the renegotiate employment agreement step. Example: Employment Agreement and Renegotiate Employment Agreement.

Related Information

Tasks

Configure Generated Documents

Reference

The Next Level: Employment Agreement — Easily Automate Your Pre-Hire Contracts

Workday 2023R2 What's New Post: Establishment on Employment Agreement, Offer, and Staffing

Steps: Set Up Task Consolidation for Employment Agreements

Prerequisites

Configure the *Employment Agreement* business process and security policy in the Recruiting functional area.

Context

You can set up task consolidation for employment agreements from job applications. You can then consolidate employment agreement tasks from My Tasks to complete them at once.

Steps

1. Set up task consolidation for the *Employment Agreement* business process.

   If you've configured the relevant subprocesses for the *Employment Agreement* business process, set up task consolidation for these business process policies:

   - *Pre-Hire Collective Agreement Details*
   - *Pre-Hire Contract Details*
   - *Pre-Hire Notice Period Details*
   - *Pre-Hire Probation Period Details*

   See Steps: Set Up Task Consolidation.
2. (Optional) Set up task consolidation for Compensation subprocesses.

   See Set Up Task Consolidation for Compensation in Recruiting on page 1052.
3. Edit Domain Security Policies.

   Grant Modify access to security groups for these domains in the Recruiting functional areas:

   - *Pre-Hire Data: Business Title*
   - *Pre-Hire Data: Employment Agreement*
   - *Pre-Hire Data: End Date*
   - *Pre-Hire Data: Start Date and Location*

   If you've configured the relevant subprocesses, grant Modify access to security groups for these domains in the Recruiting functional areas:

   - *Employment Agreement: Collective Agreements*
   - *Employment Agreement: Employee Contracts*
   - *Employment Agreement: Notice Periods*
   - *Employment Agreement: Probation Period*
4. Activate Pending Authentication Policy Changes.

Result

You can now consolidate tasks in My Tasks for employment agreements from job applications into a workbook.

Next Steps

Access the Consolidate Tasks report to consolidate available tasks.

Related Information

Concepts

Concept: Managing Workbooks

Reference

Reference: Workbook Actions Available Based on Permissions

2020R1 What's New Post: Consolidated Tasks for Employment Agreements

Create Employment Agreements

Prerequisites

- Configure the *Employment Agreement* business process and security policy in the Staffing functional area.
- Security: *Pre-Hire Data: Employment Agreement* domain in the Pre-Hire Process functional area.
- Create job requisitions.

Context

You can create a detailed employment agreement for a pre-hire that includes:

- Collective agreements.
- Compensation.
- Contract details.
- Job requisition details.
- Notice Periods
- One-time payments.
- Probation periods.
- Stock grants.

If you've consolidated the *Employment Agreement* business process template, tasks from your configured subprocesses start at the same time and display in a streamlined, guided workflow. This workflow enables you to:

- Move easily between the components that make up the employment agreement.
- Review and approve all of the components of the employment agreement at once.

Steps

1. Access the Create Employment Agreement task.
2. (Optional) On the Start section, enter new values for the fields you want to change.

   If the job requisition has additional job profiles, the primary job profile populates in the employment agreement and you can select a different job profile. The Job Profile field is read-only if the job requisition only has 1 job profile.

   Changing the data on this section won't change the original data on the job requisition.
3. Complete the component tasks of the employment agreement.

Result

If you configured the *Generate Document* step on the *Employment Agreement* business process, you can now generate employment agreement documents.

Next Steps

- Hire the pre-hire.
- Renegotiate the approved employment agreement for a job application.

Related Information
Tasks
Create and Edit Job Requisitions on page 611

Example: Correct and Regenerate Employment Agreement Document

This example describes how to correct and regenerate an accepted employment agreement document.

Context

You send an employment agreement to a successful candidate with a start date of 2020-08-27. The job location is Munich. The candidate signs and returns the employment agreement document and you move the candidate to the *Hire* stage. The candidate later requests a start date of 2020-09-27 and a job location of Berlin. You need to make corrections and regenerate another employment agreement document. You want all the copies of the employment agreement documents to be accessible on the candidate profile.

Prerequisites

- Configure the *Regenerate Employment Agreement Documents* business process and security policy in the Recruiting functional area.
- Add the *Generate Document* step followed by the *Review Document* step to the *Regenerate Employment Agreement Documents* business process definition.
- Security:

  These domains in the Recruiting functional area:

  - *Candidate Data: Attachments*
  - *Candidate Data: Offer Details*
  - *Pre-Hire Data: Employment Agreement* in the Recruiting and Pre Hire Process functional areas.

Steps

1. Access the candidate profile.
2. Select Business Process > Business Process Event History from the related actions menu.
3. In the Job Application field, select the candidate job application.
4. Click OK.
5. On the Process tab of the View Recruiting Event page, select Business Process > Correct from the related actions menu on the *Employment Agreement* business process.
6. On the Correct Business Process page, make these changes:

Field	Option
Hire Date	*2020-09-27*
Location	*Berlin*

7. Enter a Comment to explain the update you have made to the employment agreement document.
8. Click Submit.
9. From the related actions menu of the *Employment Agreement* business process, select Business Process > Regenerate Employment Agreement Documents.
10. Click OK.
11. Click Open to review the regenerated employment agreement document.
12. Click Submit.

Result

When you regenerate an employment agreement document and you have the *Review Document* step configured:

- Workday displays the regenerated employment agreement document on the Employment Agreement Attachments tab of the candidate profile.
- The candidate receives a notification to alert them to review and acknowledge the new employment agreement document in Candidate Home.

Candidates can electronically sign the employment agreement document using Adobe Sign or DocuSign.

Related Information

Reference

Workday 2024R1 What's New Post: Regenerate Employment Agreement Documents

Examples

Example: Correct and Regenerate an Offer Document on page 495

Contracts and Agreements

Collective Agreements and Unions

Setup Considerations: Collective Agreements

You can use this topic to help make decisions when planning your configuration and use of collective agreements. 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

In Workday, you can assign collective agreements to employees to determine their workplace conditions and the duties of the employer as defined by union negotiations.

Business Benefits

To reduce manual effort and help you comply with regulatory requirements, you can use collective agreements to determine these conditions for an employee:

- Duration of notice periods and probation periods.
- Eligibility for allowances and benefits.
- Eligibility for time off and absence plans.
- Minimum weekly working hours.
- Minimum base pay.

You can configure eligibility rules that can help identify which collective agreements you can assign to employees. You can also schedule collective agreement reviews, streamlining the process of monitoring and updating employee collective agreement assignments.

You can save time and improve data accuracy by defaulting compensation on job requisitions and the communication of collective agreement details in job postings.

Use Cases

In addition to assigning collective agreements to each employee's position, you can:

- Define collective agreements on job requisitions and evergreen requisitions.
- End or update collective agreement assignments for employees when unions renegotiate collective agreements.
- Report on employees with collective agreements.
- Restrict collective agreements to certain countries or locations.
- Create eligibility rules that identify applicable collective agreements for the employee.
- Schedule collective agreement reviews.

Questions to Consider

Questions	Considerations
Do you want to restrict the collective agreement to a certain country or location?	You can restrict a collective agreement to a country or location when you create collective agreements to prevent inaccurate assignments.
What criteria determines an employee's collective agreement?	You can create eligibility rules to determine an employee's collective agreement based on factors such as an employee's job profile. If an employee is only eligible for 1 collective agreement, the collective agreement populates when you assign it. If an employee is eligible for more than 1 collective agreement, you can select an eligible collective agreement. If you use eligibility rules, we recommend that you also restrict collective agreements to countries or locations to prevent inaccurate assignments.
What factor options apply to the classification factors for each collective agreement?	You can configure factor option combinations for 5 classification factors to define conditions of employment. The classification factors include: • *Area* • *Class* • *Coefficient* • *Group* • *Level* • *Position* • *Professional Category* • *Rating* • *Step* Example: You configure *Blue Collar* for the *Professional Category* factor and *140* for the *Coefficient* factor. You also configure *Blue Collar* for the *Professional Category* and *145* for the *Coefficient* factor as another combination. If you select a factor option from a unique combination when assigning collective agreements, Workday populates the other factor options.
Do you want to use collective agreements in the *Change Job* business process guided view?	If you're using the consolidated template for the *Change Job* business process, you can configure the *Assign Collective Agreement (Consolidated Template)* step on the business process. This step enables you to update collective agreement data and populate compensation data in a guided view. To display the Assign Collective Agreement subprocess in the simplified Change Job user interface, on the Maintain Change Job Templates task, select the Enable Enhanced User Interface check box for templates that include the Assign Collective Agreement subprocess.

Questions	Considerations
	If you're not using the consolidated template for the *Change Job* business process, you can configure the *Assign Collective Agreement* step. Workday cancels the collective agreement event after you submit a job change for a worker with a collective agreement when you don't update the collective agreement information or change the collective agreement.
Do you want to use collective agreements in the *Employment Agreement* business process guided view?	You can configure the *Pre-Hire Collective Agreement Details* subprocess in the consolidated template for the *Employment Agreement* business process. This setup enables you to update collective agreement data and populate compensation, probation period, and notice period data in a guided view.
Do you want to autocomplete collective agreement assignments in staffing business processes?	If you're using Recruiting, you can configure the *Initiate Pre-Hire Collective Agreement Details* step on the *Employment Agreement* business process and enable autocomplete for the event. If you enable autocomplete for the event, the employee must meet an eligibility rule that populates the collective agreement to complete the event. You can configure the *End Collective Agreement Assignment* step on the *Termination* business process and enable autocomplete for the event. This step autocompletes if the termination date is the same as the collective agreement end date.
Do you want to schedule collective agreement reviews?	You can enable the Collective Agreement: Review field on the Staffing area in the Maintain Localization Settings task. You can then add security group to the Assign Collective Agreement on Collective Agreement Review Date initiating action on the Assign Collective Agreement business process policy to specify who should receive the Assign Collective Agreement task on the review date. If you enter a collective agreement review date when assigning a collective agreement to a worker and specify a security group on the Assign Collective Agreement business process policy, Workday automatically assigns an Assign Collective Agreement event to the members of the security group when the review date is reached. If you don't specify a security group on the Assign Collective Agreement business process policy, the Assign Collective Agreement event routing will go unassigned.

Recommendations

Workday recommends that:

- You configure the *Assign Collective Agreement* and *End Collective Agreement Assignment* steps on available business processes to streamline data.
- If you're not using eligibility rules, hide the Eligibility Rule field on collective agreement tasks to improve user experience.

Requirements

If you have collective agreements with classification factors, you must set up factor options.

Limitations

You can only add 5 classification factors to a collective agreement.

Tenant Setup

No impact.

Security

Domains	Considerations
Candidate Data: Offer Details in the Recruiting functional area.	Provides access to the offer details of a candidate.
Employment Agreement: Collective Agreement in the Pre-Hire Process and Recruiting functional areas.	Provides access to collective agreement data in employment agreements.
Pre-Hire Data: Employment Agreement in the Pre-Hire Process and Recruiting functional areas.	Provides access to Employment Agreement Data for Pre-Hires.
Self-Service: Collective Agreement Information in the Staffing functional area.	Provides users access to their own collective agreement data.
Set Up: Collective Agreement Rules in the Staffing functional area.	Provides access to collective agreement eligibility rules.
Set Up: Collective Agreements in the Staffing functional area.	Provides access to collective agreement setup.
Worker Data: Collective Agreements in the Staffing functional area.	Provides access to collective agreement data for employees.

Business Processes

Business Processes	Considerations
Assign Employee Collective Agreement	Enables you to assign a collective agreement to an employee. You can streamline collective agreement assignments by configuring the *Assign Collective Agreement* step on these business processes: • *Add Additional Job* • *Change Job* • *Hire*

Business Processes	Considerations
	If you're using the consolidated template for the *Change Job* business process, Workday recommends that you configure the *Assign Collective Agreement (Consolidated Template)* step instead. If you rescind or cancel an automatically generated Assign Collective Agreement event, Workday won't trigger a new event for that specific collective agreement assignment and review date.
End Collective Agreement Assignment	Enables you to end collective agreement assignments for an employee. You can configure the *End Collective Agreement Assignment* step on the *Termination* business process to end collective agreement assignments for employees you plan to terminate.
Pre-Hire Collective Agreement Details	Enables you to maintain collective agreement details for the *Initiate Pre-Hire Collective Agreement Details* step on the *Employment Agreement* business process. Enables you to specify collective agreements and factors when creating evergreen requisitions and job requisitions when made a subprocess of these business processes: • *Create Evergreen Requisition* • *Create Job Requisition* • *Edit Evergreen Requisition* • *Edit Job Requisition* The collective agreement information that you define on the job requisition will be flowed into the Collective Agreement step on subsequent staffing processes. Example: Employment Agreement.

Reporting

Reports	Considerations
Collective Agreement Report	Use to view a summary of the details for a collective agreement and the number of assignments. The effective date is based on the assignment date.
View Collective Agreement	Use to view details such as location restrictions and eligibility rules for a collective agreement.
View Collective Agreement Factor Options	Use to view the factor options for a classification factor.
Employees Covered by Collective Agreements	Use to view employees with collective agreement assignments.

You can use the All Collective Agreements report data source to create custom reports.

You can add a custom report to the *Approval* and *Review* steps on the *Assign Employee Collective Agreement* business process to provide additional data for users completing these steps.

Integrations

Use these web services to upload collective agreements, eligibility rules, and collective agreement assignments in bulk:

- *Assign Employee Collective Agreement Event*
- *End Collective Agreement Assignment*
- *Put Collective Agreement*
- *Put Global Staffing Eligibility Rule*

Use these web services to retrieve collective agreements and eligibility rules for collective agreements:

- *Get Collective Agreements*
- *Get Global Staffing Eligibility Rules*

Use these web services to specify collective agreements and factors when creating job requisitions and evergreen requisitions:

- *Create Evergreen Requisition*
- *Create Job Requisition*
- *Edit Evergreen Requisition*
- *Edit Job Requisition*

Connections and Touchpoints

Features	Considerations
Absence	You can configure absence rules and calculations based on collective agreements to determine the absence plan for employees. Workday recommends that you also consider collective agreements assigned midperiod for rules and calculations.
Benefits	You can configure benefit eligibility rules based on collective agreements to determine the benefit plan or rate for employees. When you change collective agreement assignments, benefit elections don't automatically change.
Compensation	You can configure base pay tables with compensation grade steps to determine base pay for a collective agreement assignment. You can also create compensation eligibility rules based on collective agreements to determine compensation for employees. When you change collective agreement assignments, compensation assignments don't automatically change.
Notice Periods Probation Periods	You can create eligibility rules based on collective agreements that determine probation periods and notice periods for employees.
Payroll (AUS)	If you use Workday Payroll for Australia, you can map collective agreement factor options with class report fields to create appropriate payroll

Features	Considerations
	calculations, reporting, and custom payslips for each employee.
Payroll (FRA)	If you use Workday Payroll France, you can map collective agreement factor options to DSN rubric values to identify appropriate payroll calculations and reporting for each employee.
Time Tracking	You can create eligibility rules based on collective agreements to determine how Workday calculates working time.
Unions	You can associate a collective agreement with a union.

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: Autocomplete Staffing Events on page 519

Reference

The Next Level: Understand Collective Agreements

Steps: Manage Collective Agreements

Prerequisites

- Configure these business processes and security policies in the Staffing functional area:
  - *Assign Employee Collective Agreement*
  - *End Collective Agreement Assignment*
- Security: These domains in the Staffing functional area:
  - *Set Up: Collective Agreements*
  - *Worker Data: Collective Agreements*

Context

You can set up collective agreement factors and options to comply with labor laws that apply to your business and employees. You can configure collective agreements as a stand-alone business process or as a subprocess of these business processes:

- *Add Additional Job*
- *Change Job*
- *Hire*
- *Termination*

You can create eligibility rules for collective agreements to reduce manual effort for assigning collective agreements to employees. You can also schedule collective agreement reviews to streamline the process of monitoring and updating employee collective agreement assignments.

Steps

1. Access the Maintain Collective Agreement Factor Options task.

   Configure the collective agreement factor options for your organization.

   Security: *Set Up: Collective Agreements* domain in the Staffing functional area.

2. (Optional) Access the Create Global Staffing Eligibility Rule task.

   Create eligibility rules for collective agreements.

   Security: *Set Up: Collective Agreement Rules* in the Staffing functional area.
3. Access the Create Collective Agreement task.

   Add a row for each combination of Classification Factor Values for the classification factors that you want to permit for the collective agreement.

   Example:

Factor 1 (Professional Category)	Factor 2 (Level)	Factor 3 (Step)	Factor 4 (Coefficient)
Blue Collar	I	1	140
Blue Collar	I	2	145
Blue Collar	I	3	155
White Collar	I	1	140
White Collar	I	2	145
White Collar	I	3	155

   If you created eligibility rules, you can select an eligibility rule for the collective agreement.

   Note: When you copy an existing collective agreement with an end date, Workday populates the Start Date of the new agreement to 1 day after the End Date of the existing agreement.

   Security: *Set Up: Collective Agreements* domain in the Staffing functional area.
4. (Optional) Set up *Assign Employee Collective Agreement* as a subprocess of the *Change Job* business process to update collective agreement and compensation data in a guided view.
   a. Configure the *Assign Collective Agreement (Consolidated Template)* initiating action as a step on the *Change Job* business process.
   b. Configure *Assign Employee Collective Agreement* as a subprocess of the *Change Job* business process consolidated template.
5. Maintain Localization Settings on page 144.

   Enable the Collective Agreement: Review field on the Staffing area.

   Security: *Set Up: Tenant Setup - Global* in the System functional area.
6. Add security groups to the Assign Collective Agreement on Collective Agreement Review Date initiating action on the Assign Collective Agreement business process policy to receive the Assign Collective Agreement event on the collective agreement review date.
7. (Optional) Hide or Require Optional Fields.

   Hide or require fields on these tasks and report :

   - Assign Collective Agreement
   - Create Collective Agreement
   - Edit Collective Agreement
   - View Collective Agreement

   To improve your user experience, Workday recommends hiding the Eligibility Rule field if you're not using eligibility rules for collective agreements.

   You can hide or require the *Worker Profile: Collective Agreement Review Date* field on the Collective Agreement for Current Position Worker Profile functional area to control the display of the Collective Agreement Review Date field on a worker's profile.

8. (Optional) Add Worklets to Business Processes on page 2969.

   To display information from your custom reports to help users complete the step, embed worklets on *Approval* or *Review* steps of the *Assign Employee Collective Agreement* business process.

Result

If you configured eligibility rules for collective agreements and an employee is only eligible for 1 collective agreement, Workday populates the Collective Agreement prompt on the Assign Collective Agreement task.

Workday displays the Collective Agreement Review Date on:

- The Assign Collective Agreement task.
- The End Collective Agreement Assignment task.
- An Employment agreement when you assign a collective agreement to an employment agreement.
- An offer letter when you assign a collective agreement to an offer.
- A Worker's profile.

Next Steps

Access the:

- Edit Collective Agreement task to change the terms of an existing collective agreement.
- Assign Collective Agreement task to assign a collective agreement to an employee.
- End Collective Agreement Assignment task to end a collective agreement assignment for an employee.

Related Information

Tasks

Set Up Rule Based Consolidated Templates for Job Changes on page 859

Steps: Purge Person Privacy Data

Reference

The Next Level: Understand Collective Agreements

Steps: Manage Unions

Prerequisites

Security: *Set Up: Unions* domain in the Unions functional area.

Context

You can set up unions in Workday to:

- Define different types of union membership.
- Track workers membership in a union.

You can also use union membership information in eligibility rules to determine the eligibility of workers for deductions and benefits.

Steps

1. Edit Business Process Security Policies.

   Configure the *Union Membership Event* business process and security policy in the Unions functional area.
2. Configure the Union Profile.
3. Set Up Unions on page 650.
4. Create Union Membership Types on page 651.

5. (Optional) Hide or Require Optional Fields.

   Hide or require optional fields on the *Manage Union Membership* business process.
6. Manage Union Membership for Workers on page 651.
7. (Optional) Manage data purging for union membership.

   See ../../../../authentication-and-security/data-privacy/data-purging/lub1590696272749.dita.
8. (Optional) Create Custom Labels.
9. (Optional) Add Worklets to Business Processes on page 2969.

   To provide related information for unions and workers, add custom worklets to the business process steps.

Next Steps

Access the Workday Standard Reports report and select the *Set Up Labor Unions* and *Unions* categories to track unions and union membership types.

Set Up Unions

Prerequisites

Security: *Set Up: Unions* domain in the Unions functional area.

Context

Set up the unions that your employees belong to.

Steps

1. Access the Maintain Unions task.
2. Complete the task:

Option	Description
Union Name	Name of the union. Example: *Autoworkers - Local 1188*.
Union ID	Reference ID for web services that upload membership information.
Active Members	Number of workers associated with the union whose membership type has the Active Member check box selected.
Inactive Members	Number of workers associated with the union whose membership type doesn't have the Active Member check box selected.

3. Click OK and Done.

Next Steps

- Access the Maintain Union Membership Types task to define the different types of union membership, and link the unions to the applicable membership types.
- Use the Unions report to see all unions entered in Workday.

Related Information

Tasks

Steps: Manage Unions on page 649

Create Union Membership Types

Prerequisites

- Set up unions.
- Security: *Set Up: Unions* domain in the Unions functional area.

Context

You can create the types of union memberships available to workers. Examples: *Regular*, *Dues only*.

Steps

1. Access the Maintain Union Membership Types task.
2. Complete the task:

Option	Description
Membership Type	Identify the types of memberships, such as *Regular* or *Dues only*.
Active Member	Workers with this type of membership are active members and included in the *active* count. You can use active members in rules for Absence, Benefits, and Compensation.
Pays Dues	Workers with this type of membership pay membership dues.
Applicable Unions	Indicate which membership types are available to a worker.
Usage	Number of the union membership entries, current and past history, with this type of membership.

3. Click OK and Done.

Next Steps

- To add a union membership to a worker, access the Manage Union Membership task.
- To see all membership types entered in Workday, access the View Union Membership Types report.
- Delete a membership type if the Usage Count is zero.

Manage Union Membership for Workers

Prerequisites

Security: *Set Up: Unions* domain in the Unions functional area.

Context

Union membership determines the benefit and deduction eligibility for workers.

Example: Include union member information in worker eligibility rules so that all union members pay membership dues. You can also include union member information in worker benefit eligibility rules so that all union members are part of a benefit group.

You can streamline managing workers' union membership by configuring the *Manage Union Membership* step on these business processes:

- *Add Additional Job*

- *Change Job*
- *Edit Position*
- *End Additional Job*
- *Hire*
- *Termination*
- *Union Membership Event*

Example: Configure the *Manage Union Membership* step on the *Change Job* business process to assign a different union membership to workers as part of the job change workflow, so transferring workers initiates a change in benefits and thus a change in union membership.

You can enter multiple union membership activity records for workers.

Only members of supervisory organizations, not members of location hierarchies, can manage workers' union membership.

Steps

1. Access the Manage Union Membership task.
2. Complete the task:

Option	Description
Union Seniority Date	Select the date from which the worker is associated with the union.
Start Date	Select a start date after the end date of the previous union membership activity.
End Date	When you have more than 1 record of union membership activity, select an end date that's before the start date of the next union membership activity. You can leave the end date blank when there is no union membership activity record following this membership activity.

3. Click Submit .

Related Information
Tasks
Steps: Manage Unions on page 649

Employee Contracts

Setup Considerations: Employee Contracts

You can use this topic to help make decisions when planning your configuration and use of employee contracts. 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

Employee contracts in Workday are a highly configurable way of managing details for fixed-term and open-ended employee contracts.

Business Benefits

You can easily maintain contracts for employees, generate documents for contracts, and report on contract details, enabling you to comply with regulatory requirements. You can also configure employee contracts to increase efficiency and reduce manual effort by:

- Configuring warnings to limit fixed-term contract renewals and duration for contracts.
- Populating a contract review date for fixed-term contracts.
- Populating a contract status in business processes.

Use Cases

You can use employee contracts to:

- Record and report on the expected duration of an employee's employment.
- Record additional data for your requirements through creating custom fields.
- Generate documents for contracts that employees can view on their worker profile.
- Review fixed-term contracts and renew or end the contract as required.
- Schedule a contract review date.
- Create rules for fixed-term contract renewals and maximum combined contract duration.

Questions to Consider

Questions	Considerations
Do you review and renew fixed-term employee contracts?	You can use the *Review Employee Contracts* business process to review and renew or end their contract. The *Review Employee Contracts* business process only initiates for employees who have a review date on their latest active employee contract. Workday doesn't require you to review and renew fixed-term contracts.
What are your criteria for fixed-term employee contracts rules?	You can set up rules to define a maximum combined contract duration, maximum number of renewals, and populate a contract review date for employees. If you set a maximum combined contract duration, Workday displays a warning message when you add a contract duration that exceeds the maximum. Workday doesn't require you to define rules for fixed-term contract reviews and renewals.
What actions do you want to take during the contract review?	You can: • Add an open-ended contract. • Add a fixed-term contract. • Change the employee's job to update job and contract details. • Extend the contract. • End the contract by terminating the employee.
Do you need to create contracts for contingent workers?	Employee contracts are only available to employees. You can configure the *Contract*

Questions	Considerations
	Contingent Workers business process to contract contingent workers.
What requirements do you have for contract IDs?	You can configure Workday to calculate employee contract IDs for new contracts. An employee contract ID doesn't change due to internal transfers or contract conversions. When you configure employee contract ID calculations, Workday: • Generates a new contract ID for contracts created with the *Hire* business process or related web service. • Copies the contract ID from the previous contract for contracts created outside of the *Hire* business process, but within the same employment. Example: *Change Jobs*. Copying contract IDs ensures continuity in contract IDs when producing regulatory reports, such as Déclaration Socials Nominative (DSN) reporting.

Recommendations

Workday recommends that you:

- Configure the *Maintain Employee Contract* step on available business processes to streamline updates.
- Configure the *Maintain Employee Contract* step on the *Termination* business process to end contracts and prevent overlapping contracts for rehires.
- Add 2 *Maintain Employee Contract* steps on the *Change Job* business process. The first step ends the existing employee contract and the second step adds a new employee contract.
- Configure country-specific localized fields in the Staffing area on the Maintain Localization Settings task to enable employee contract fields and components.
- Ensure that the contract is fixed-term before using contract reviews.
- Select days for a more accurate way to define a maximum combined contract duration. Example: Workday calculates 52 weeks as 364 days.
- Test eligibility rules for employee contract reviews and renewals with the Test Global Staffing Eligibility Rule report.

Requirements

To enable employee contract reviews and renewals, configure the *Employee Contract: Review* localized field.

Limitations

You can:

- Add contract review dates only for employees.
- Review each fixed-term contract or contract extension only once.
- Only select a contract review date on the *Maintain Employee Contracts* web service. The web service doesn't currently support populating review dates from contract rules.
- Configure only 1 active contract for a job at a time, based on the contract start and end date.

Tenant Setup

In the Maintain Localization Settings task, you can configure Workday to generate a contract ID for new contracts based on DSN requirements.

In the Edit Tenant Setup – HCM task, you can:

- Configure a sequence generator for employee contract IDs.
- Automatically update the End Employment Date field for fixed-term employees whose Contract End Date changes.

Security

Domains	Considerations
Employment Agreement: Employee Contracts in the Pre-Hire Process and Recruiting functional areas.	Users secured to this domain can view or modify employee contract data for pre-hires during the *Employment Agreement* business process.
Staffing Actions: Job Requisition Employee Contract Details in the Staffing functional area.	Users secured to this domain can view or modify employee contract details on job requisitions.
Set Up: Employee Contracts in the Staffing functional area.	Users secured to this domain can configure employee contract reasons and statuses.
Set Up: Employee Contract Rules in the Staffing functional area.	Users secured to this domain can configure employee contract rules.
Worker Data: Employee Contracts in the Staffing functional area.	Users secured to this domain can view or modify employee contract data for employees.

Business Processes

Business Processes	Considerations
Employee Contract	Enables you to add, edit, and extend employee contracts.
Edit Employee Contract Additional Data Event	Enables you to add custom fields for employee contracts.
Review Employee Contracts	Enables you to review and renew fixed-term employee contracts.
Termination	You can configure the *Terminate from Review Employee Contract* initiating action to terminate an employee during a contract review.

Reporting

Reports	Considerations
Employee Contracts	Displays all employee contract details for an employee.
Employees with Contracts	Displays employees with contracts and details such as location, job title, and contract type.
View Document Template Details	Displays document templates for employee contract created with Workday Docs.

Integrations

You can build inbound EIB integrations based on these web services to upload custom fields for employee contracts, maintain employee contracts, and upload contract rules:

- *Edit Employee Contract Additional Data*
- *Maintain Employee Contracts*
- *Put Global Staffing Eligibility Rule*
- *Put Maintain Employee Contract Rules for Country*

You can use these web services to retrieve employee contract rules:

- *Get Global Staffing Eligibility Rules*
- *Get Maintain Employee Contract Rules for Country*

Connections and Touchpoints

Workday uses employee contracts in Payroll (FRA) for payroll calculations and DSN reporting. For DSN reporting requirements:

- Workers must have a valid contract during their entire employment.
- The Contract ID for the contract must remain the same from hire to termination, even if the contract information changes.

Employee contracts interacts with Workday Docs to create document templates for contract documents.

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: HCM Mapping for Payroll (FRA)

Concept: Contract Setup for DSN Reporting (FRA)

Concept: Workday Docs

Tasks

Contract Contingent Workers on page 723

Steps: Set Up Workday Docs

Reference

Reference: DSN Data Requirements (FRA)

Workday 33 What's New Post: Employee Contract Reviews

Steps: Set Up Employee Contracts

Prerequisites

- Configure the *Employee Contract* business process and business process policy in the Staffing functional area.
- Security: *Set Up: Employee Contracts* domain in the Staffing functional area.

Context

You can set up employee contracts by defining types, statuses, and reasons so you can report on hiring reasons and contract details within your organization. Optionally, you can set up renewals and reviews for fixed-term employee contracts. You can also create custom fields for employee contracts to track data according to your business requirements.

These contracts aren't the same as supplier contracts for contingent workers.

Steps

1. Access the Maintain Employee Contract Types task.

   Optionally, you can enter a Code to label the contract type for specific reporting purposes.

   Note: Use this field only if you're labeling the contract type for the MMO Preparation (France) report for the purpose of *recrutement sous CDD de 18 à 36 mois à objet défini (pour cadres et ingénieurs, loi n° 2008-596 du 25/06/2008)*.
2. Access the Maintain Employee Contract Statuses task.

   If you select a business process from the Default for Business Process prompt, Workday only populates the contract status in the final *Maintain Employee Contract* step.

   If you select Enable Autocomplete on the *Employee Contract* business process definition, you must populate a contract status in the relevant business processes to complete the *Maintain Employee Contract* step automatically.
3. Access the Maintain Employee Contract Reasons task.

   Set up employee contract reasons.

   You can create and select employee contract categories from the Employee Contract Category prompt.
4. (Optional) Maintain Localization Settings on page 144.

   Configure these localized fields in the Maintain Localization Settings task:

   - *Employee Contract: Maximum Weekly Hours*
   - *Employee Contract: Minimum Weekly Hours*

   These localized fields enable you to track minimum and maximum weekly contract hours for employees with primary positions in the countries you configured.
5. (Optional) Set up employee contract reviews for fixed-term contracts.

   See Steps: Set Up Employee Contract Reviews on page 657.
6. (Optional) Calculate Employee Contract IDs on page 658.
7. (Optional) Create custom fields for employee contracts.

   See Example: Add Custom Fields to Employee Contracts on page 664.
8. (Optional) Steps: Set Up Profiles and Profile Groups.

   To display a composite view of contract details, configure the Employee Contract profile and the Overview for Employee Contract profile group.
9. (Optional) Hide or Require Optional Fields for Employee Contracts.

Related Information

Concepts

Concept: Workday Docs

Tasks

Add Employee Contracts on page 660
Hire Employees on page 690
Display Additional Data in Profiles
Steps: Generate Dynamic Documents
Steps: Set Up Workday Docs

Steps: Set Up Employee Contract Reviews

Prerequisites

Security: *Set Up: Employee Contracts* domain in the Staffing functional area.

Context

You can set up contract reviews to renew or take other actions on fixed-term employee contracts. You can also configure rules to define the maximum number of renewals, maximum duration of combined contracts, and review date.

Steps

1. Edit Business Process Security Policies.

   Set up security for the:

   - Initiating actions on the *Review Employee Contracts* business process policy.
   - Initiating actions on the *Employee Contract* business process policy.
   - *Terminate from Review Employee Contract* initiating action on the *Termination* business process policy if you want to terminate an employee from a contract review.
2. Create Custom Business Processes.

   Configure the *Review Employee Contracts* business process.

   Ensure that you configure the relevant steps for actions you want to select during the contract review.
3. Maintain Localization Settings on page 144.

   Activate the *Employee Contract: Review* localized field.
4. (Optional) Set Up Employee Contract Rules on page 659.

   Define rules for contract renewals and reviews.
5. (Optional) Hide or Require Optional Fields for Employee Contracts.

Result

You can now:

- Select a Contract Review Date when you add or edit contracts with end dates.
- Manually initiate a review by clicking Start Review on the *Employee Contracts* report to select an action for the contract.

Related Information

Reference

Workday 33 What's New Post: Employee Contract Reviews

Calculate Employee Contract IDs

Context

You can configure Workday to calculate employee contract IDs for new contracts for new hires, helping ensure that an employee contract ID doesn't change due to internal transfers or contract conversions. This can help you when producing regulatory reports, such as Déclaration Sociale Nominative (DSN) reporting, by ensuring continuity in contract IDs.

When you configure employee contract ID calculations, Workday:

- Generates a new contract ID for contracts created with the *Hire* business process or related web service.
- Copies the contract ID from the previous contract for contracts created outside of the *Hire* business process, but within the same employment. Example: *Change Jobs*.

When configuring employee contract ID calculations, consider Workday:

- Doesn't calculate a contract ID when you create a new contract with a different employment. Example: *Add Additional Job*.

- Only calculates a contract ID for a subsequent hire or rehire when you use the *Hire* business process or subprocess to add the contract for the current employment.

Steps

1. Create ID Definitions and Sequence Generators.
2. Access the Edit Tenant Setup - HCM task.

   In the ID Sequence Generators section, select the ID definition you created from the ID Definition for Employee Contract ID prompt.

   You can't specify a different logic for generating contract IDs for different countries.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.
3. Access the Maintain Localization Settings task.

   From the Area prompt, select *Staffing*.

   Activate and configure the row for the Employee Contract: Generate Contract ID for each New Employment localized field.

   You can use this localized field outside France where the DSN reporting guidelines don't apply.

   Security: *Set Up: Tenant Setup - Global* domain in the System functional area.

Related Information
Reference
2021 R2 What's New Post: Employee Contract ID Calculations

Set Up Employee Contract Rules

Prerequisites

Security: *Set Up: Employee Contract Rules* in the Staffing functional area.

Context

You can set up rules for fixed-term contracts to:

- Define the maximum number of renewals.
- Define the maximum combined contract duration.
- Populate a contract review date.

Steps

1. Access the Maintain Employee Contract Rules for Country task.
2. Select *Create Global Staffing Eligibility Rule* from the Employee Contracts Eligibility Rule prompt.
3. Create an eligibility rule for the employee contract rule.
4. As you complete the task, consider:

Field	Description
Number of Employee Contract Renewals	If you enter a Maximum number of contract renewals, Workday displays a warning message when the contract renewal exceeds this number. If you select Do Not Allow, Workday displays a warning message when you renew the contract.

Field	Description
Count Extensions as Renewals	Select this check box to include contract extensions in the number of contract renewals.
Maximum Combined Employee Contract Duration	If you enter a maximum combined contract duration, Workday displays a warning message when the contract exceeds this duration. Workday calculates the combined contract duration by adding the duration of each fixed-term contract. Workday doesn't include gaps between contracts in this calculation.
Schedule Review (Time before contract end date)	If you want to populate a review date for the contract, enter an amount of time before the contract the end date.

Result

If you schedule a review, and specify a security group on the Review Employee Contracts business process policy, Workday automatically sends a task to My Tasks of the members of the security group when the review date is reached.

Related Information

Tasks

Steps: Set Up Employee Contract Reviews on page 657

Reference

Workday 33 What's New Post: Employee Contract Reviews

Add Employee Contracts

Prerequisites

- Configure the *Employee Contract* business process and security policy in the Staffing functional area.
- Specify whether to synchronize employment and contract end dates for fixed-term employees in the Edit Tenant Setup - HCM task.

  Note: If there's a future *Contract* event, the End Employment Date synchronizes with the Contract End Date of the most future dated *Contract* event. Also, the Contract End Date displays the end date of the active contract.

Context

In some locations, you can have contracts for employees (as opposed to contingent workers). The Add Contract task doesn't include the contract terms, but it enables you to:

- Attach a copy of the contract.
- Track and report on the contract dates, effective dates, status, and type.

Optionally, you can add employee contracts as a subprocess by configuring the Maintain Employee Contract step when you edit business processes such as:

- *Add Additional Job*
- *Change Job*
- *Hire*
- *Termination*

When *Employee Contract* is a stand-alone business process and the contract start date is in the future, Workday sets the event effective date to the contract start date. If you synchronize these dates, Workday prevents the employee from seeing the event or any attached documents until that date.

Employees can have only one active contract for a job at a time, based on the contract start and end date. A contract can span multiple, nonconcurrent positions as an employee is transferred, promoted, or otherwise moved into new positions of the same type (primary or additional).

Steps

1. Access the Add Contract task.
2. Select the Worker and the Contract Start Date.

   If the employee has multiple jobs, also select the Job.
3. As you complete this task, consider:

Option	Description
Reason	Available if you configure reasons in the Maintain Employee Contract Reasons task. You can select a reason associated with the employee's country or a reason not restricted by country.
Contract Start Date	The start date can't be earlier than the employee's hire date.
Type	You can configure contract types in the Maintain Employee Contract Types task. You can select a type associated with the employee's location or a type not restricted by location.
Status	You can configure statuses in the Maintain Employee Contract Statuses task. You can select a status associated with the employee's location or a status not restricted by location.
Date Employee / Employer Signed	The Date Employer Signed can't be later than the contract date.
Contract End Date	This date displays in reports, but doesn't trigger any action on the date. If you enabled synchronization of employment and contract end dates, Workday automatically updates the employee's end employment date to match this date.
Maximum Weekly Hours	Available if the employee's primary position is located in a country that tracks maximum contract hours. You can configure this field for countries using the Maintain Localization Settings task.
Minimum Weekly Hours	Available if the employee's primary position is located in a country that tracks minimum contract hours. You can configure this field for countries using the Maintain Localization Settings task.

Option	Description
Contract Review Date Schedule Review Unit	If there's a Contract End Date, you can schedule a contract review. Select a Contract Review Date or enter an amount of time before the Contract End Date. These fields can populate from an employee contract rule that applies to the worker.

Next Steps

To view, edit, or review details on an employee contract, select Job Change > Employee Contracts from an employee's related actions menu.

To ensure that any changes you make to contract end dates process and display correctly on the worker's profile, select the Sync Employment/Contract End Dates check box in the Staffing section of the Edit Tenant Setup - HCM task.

To correct details on an employee contract, select Business Process > Correct from the related actions of the Contract event:

- You can only correct the Contract Start Date on the Contract event that created the contract.
- You can only correct the Effective Date on a *Contract* event that edited the contract.
- You can correct only the Effective Date of a *Contract* event to a date between the Effective Date of the first preceding or superseding *Contract* event.
- You can only correct contract dates so that the event doesn't overlap with other *Contract* events.

Hide or Require Optional Fields for Employee Contracts

Prerequisites

Security: *Set Up: Configure Optional Fields* domain in the System functional area.

Context

You can hide or require fields on the tasks that use these business processes to control what information you collect:

- *Employment Agreement*
- *Employee Contract*
- *Review Employee Contract*

Steps

1. Access the Configure Optional Fields task.
2. Select 1 of these options on the By Functional Area prompt:
    - *Employee Contract*
    - *Employee Contract Composite View*
    - *Pre-Hire Contract Details*
    - *Review Employee Contract*
    - *View Employee Contracts*
3. As you complete the task, consider:

Field	Description
Field	Select a field that you want to hide or require.

Field	Description
Criteria	Select Security Group to select the roles in Hidden For and Required For to hide or require the Field.
Enforce Required in Web Services	Select to enforce required fields on all web services within the functional area. Clearing this check box enables you to correct data without populating every field on the web service.
Hidden For	Select a role from which you want to hide the Field.
Required For	Select a role for which you want to require the Field.

Note: The localized fields that you hide or require in the Maintain Localization Settings task override any settings for the related optional fields in the Configure Optional Fields task. Example: If you hide the Maximum Weekly Hours optional field on the *Employee Contract* business process, but you require the Employee Contract: Maximum Weekly Hours localized field in the Maintain Localization Settings task for Germany, the field will be required for users managing employee contracts in Germany.

Related Information

Tasks

Hide or Require Optional Fields

Concept: Employee Contracts

Overview

You can use employee contracts to issue a contract for employees and record the expected duration and other details of employment. You can also track additional fields for employee contracts through:

- Activating localized fields for contracts in the Maintain Localization Settings task.
- Creating custom fields for your organization's requirements.

Employee Contract Reviews

Employee contract reviews enable you to review and perform actions to renew or end contracts for fixed-term workers. You can't correct *Employee Contract Review* events but you can rescind these events.

Workday enables you to renew a contract by either adding a new contract or extending the contract. You can only review a contract once for each contract or for each extension.

You can configure steps on the *Change Job* business process definition if you want to extend an existing contract, or end one contract and start a new one as part of a job change.

Employee Contract Rules

Some countries have regulations for the number of times you can renew fixed-term contracts and the total duration of employment for a fixed-term contract. Employee contract rules enable you to define:

- A maximum combined contract duration
- Maximum number of contract renewals.
- A default contract review date.

Example: You can create a rule that defines an employee can only have 4 contract renewals with a maximum combined contract length of 4 years.

Workday displays warnings when a contract exceeds a maximum combined contract duration or number of renewals. Workday also populates a default contract review date on employee contracts that you can override.

Related Information
Reference
Workday 33 What's New Post: Employee Contract Reviews

Example: Add Custom Fields to Employee Contracts

This example illustrates how to add an effective-dated custom field to employee contracts.

Context

You want to track whether employees signed a nonsolicitation clause in their employee contracts. You create a custom field on a custom object and add the custom object to the *Employee Contract* and *Edit Employee Contract Additional Data Event* business processes.

Prerequisites

Security: *Custom Object Management* domain in the System functional area.

Steps

1. Access the Create Custom Object task.
2. Enter these values:

Field	Value
Workday Object	*Employee Contract (Effective Dated)*
Custom Object Name	Additional Contract Details

3. Click OK.
4. In the Field Definitions section, click Add and enter these values:

Field	Value
Field Label	Nonsolicitation Clause
Field Type	*Boolean*

5. In the Permissions section, select the *Set Up: Employee Contracts* and *Worker Data: Employee Contracts* domains from the Domain prompt.
6. Click Next, then click OK.
7. Click OK, then click Done.
8. Access the *Set Up: Employee Contracts* domain. From the related actions menu of the *Set Up: Employee Contracts* domain, select Domain > Edit Security Policy Permissions.
9. Grant *HR Administrator* Modify access to the domain.
10. Access the *Worker Data: Employee Contracts* domain. From the related actions menu of the *Worker Data: Employee Contracts* domain, select Domain > Edit Security Policy Permissions.
11. Grant *HR Administrator* View access to the domain.
12. From the related actions menu of the *Edit Employee Contract Additional Data Event* business process, select Business Process Policy > Edit and click OK.
13. Add *HR Administrator* to the *Edit Employee Contract Additional Data Event* initiating action.
14. From the related actions menu of the *Edit Employee Contract Additional Data Event* business process, select Business Process Policy > Edit and click OK.

15. Add this step:

Field	Value
Type	*Edit Additional Data*
Specify	*Additional Contract Details*
Group	*HR Administrator*

16. From the related actions menu of the *Employee Contract* business process, select Business Process Policy > Edit and click OK.
17. Add this step:

Field	Value
Type	*Edit Additional Data*
Specify	*Additional Contract Details*
Group	*HR Administrator*

18. Access the Activate Pending Security Policy Changes task.
19. Enter I confirm these security changes in the Comment field and click OK.
20. Select the Confirm check box and click OK.

Result

HR administrators can now specify whether an employee signed a nonsolicitation clause in their employee contracts when:

- Creating or editing an employee contract.
- Selecting Additional Data > Edit Effective-Dated Custom Object from the related actions menu of a magnifying glass on the Employee Contracts report.

Related Information

Concepts

Concept: Updating Effective-Dated Custom Object Data

Tasks

Create Custom Field Types

Create and Edit Custom Object Definitions

Steps: Set Up Custom Objects

Example: Create Employee Contract Rules

This example illustrates how to create an employee contract rule for a fixed-term employee based on job profile and location.

Context

You want to specify a maximum of 2 contract renewals, and a maximum combined contract duration of 1 year for a consultant in Munich. You also want to schedule a review date 2 weeks before the contract ends.

Prerequisites

- Security: *Set Up: Employee Contract Rules* domain in the Staffing functional area.
- Security: *Set Up: Tenant Setup - Global* domain in the System functional area.

Steps

1. Access the Maintain Localization Settings task.
2. Select *Staffing* from the Area prompt.
3. Click OK.
4. For the Employee Contract: Review localized field, select *Germany* from the Allow for Countries or Regions prompt, and select the Active check box.
5. Click OK and Done.
6. Access the Create Global Staffing Eligibility Rule task.
7. Enter *Consultant in Munich* in the Description field.
8. Add these rows to create an eligibility rule for the location and job profile:

Source External Field or Condition Rule	Relational Operator	Comparison Value
Location (Global Staffing Eligibility)	*exact match with the selection list*	*Munich*
Job Profile (Global Staffing Eligibility)	*exact match with the selection list*	*Consultant*

9. Click OK.
10. Access the Maintain Employee Contract Rules for Country task.
11. Select *Germany* from the Country prompt.
12. Click OK.
13. Add this row to create an employee contract rule for Germany:

Field	Value
Employee Contracts Eligibility Rule	*Consultant in Munich*
Number of Employee Contract Renewals	Enter 2 for the Maximum field.
Count Extensions as Renewals	Select this check box to include contract extensions in the number of contract renewals.
Maximum Combined Employee Contract Duration	Enter 52 for the Duration field and select *Weeks(s)* from the Unit prompt.
Schedule Review (Time before contract end date)	Enter 2 for the Duration field and select *Week(s)* from the Unit prompt.

14. Click OK and Done.

Result

- Workday displays a warning message when:
  - You have more than 2 contract renewals.
  - The contract exceeds 52 weeks.
- When you set a rule to schedule a contract review, Workday populates the contract review date when you create a contract. The contract review date is based on the contract end date and the eligibility of the contract rule.

Next Steps

Add a new contract with a Contract End Date.

Related Information

Tasks

Set Up Employee Contract Rules on page 659

Add Employee Contracts on page 660

Troubleshooting: Start Review Button Doesn't Display Beside Contract

Cause: The *Employee Contract: Review* localized field isn't activated for the country.

Solution:

Steps

Security: *Set Up: Tenant Setup - Global* domain in the System functional area.

1. Access the Maintain Localization Settings task.
2. Activate the *Employee Contract: Review* localized field for the country.

Cause: The first *Contract* event doesn't have a contract end date.

Solution:

Steps

Security: *Worker Data: Employee Contracts* domain in the Staffing functional area.

1. Access the first *Contract* event.
2. From the related actions menu of the *Contract* event, select Business Process > Correct.
3. Enter a Contract End Date.
4. Access the most recent *Contract* event.
5. Verify that the Review Date is correct.

Probation Periods

Setup Considerations: Probation Periods

You can use this topic to help make decisions when planning your configuration and use of probation periods. 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

Probation periods in Workday are a highly configurable way of managing employee probation.

Business Benefits

You can easily track, report, and adjust probation periods to support varying needs, such as compliance with local regulatory requirements. You can also configure the feature to increase efficiency and reduce manual effort by:

- Populating probation period durations for employees.
- Automatically sending notifications for reviewing probation periods.
- Tracking the outcomes of probation periods.

Use Cases

You can use probation period functionality to:

- Extend probation periods for employees who don't meet the criteria for completing probation.
- Create rules to differentiate employee probation periods based on various factors.
- Efficiently evaluate probation reviews and manage outcomes.
- Record the evaluation of the probation reviews using attachments and questionnaires.
- Perform any necessary actions on the outcome of the probation period.

Questions to Consider

Questions	Considerations
Do you need to set up probation period rules?	You can create probation period rules for each country that requires probation periods but you don't need to enable rules for every country. Workday doesn't require you to set up probation period rules to manage probation periods.
Why should you set up probation period rules?	For increased efficiency and accuracy, you can use probation period rules to populate the duration and review date when you add probation periods for employees. Example: In France, you create a probation period rule to populate a duration of 6 months for fixed-term employees. You then create another probation period rule to populate a duration of 3 months for permanent employees. You can also use probation period rules to set a maximum probation period. If you configure a maximum probation period, a warning displays when you add a probation duration that exceeds the maximum length of the rule.
How do you manage probation period reviews for employees?	To review an employee's probation period, you can schedule a probation review date at a specific point during the probation period. Workday doesn't require you to set up probation period reviews to manage probation periods.
What outcomes can you configure for a probation period review?	You can configure different outcomes to indicate the evaluation of the probation period according to your requirements.
How do you take actions on the outcomes of probation reviews?	You can link review outcomes to particular actions in Workday. The action you select initiates the relevant task. Example: If the outcome of the probation review is unsuccessful, you can select whether to extend the probation period or terminate the employee.
How do you gather information from a questionnaire on the review?	You can configure questionnaires on the *Review Probation Period* business process to track information on the evaluation of the probation review.

Recommendations

Workday recommends that you:

- Configure the *Add Probation Period* step on available business processes to streamline probation updates.
- Configure country-specific localized fields in the Staffing area of the Maintain Localization Settings task to enable probation period fields and components.
- Hide or require fields by role on the *Manage Probation Period* and *Review Probation Period* business processes to streamline data entry.

Requirements

- To enable probation period rules, you must configure the *Probation Periods* localized field.
- To enable probation reviews, you must configure the *Probation Period: Review* localized field.

Limitations

- You can only schedule 1 probation review for employees using a probation period rule. However, you can manually initiate multiple reviews if no other probation reviews are in progress.
- You can't edit an extended probation period. Instead, you can either correct the probation period or extend it again.

Tenant Setup

No impact.

Security

Domains	Considerations
Employment Agreement: Probation Period in the Pre-Hire Process functional area	Users secured to this domain can view and modify probation period data for pre-hires during the *Employment Agreement* business process.
Set Up: Staffing in the Staffing functional area.	Users secured to this domain can configure probation period reasons and types.
Set Up: Probation Period Rules in the Staffing functional area	Users secured to this domain can configure probation period rules.
Worker Data: Probation Periods in the Staffing functional area	Users secured to this domain can view and modify probation period data for employees.

Business Processes

Business Processes	Considerations
Manage Probation Period	Enables you to add, edit, and extend probation periods. You can configure these initiating actions on the business process policy.
Review Probation Period	Enables you to schedule probation reviews.
Change Job	Enables you to use the *Change Job for Review Probation Period* action during the *Review Probation Period* business process.
Termination	You can configure the *Terminate for Review Probation Period* initiating action to use the

Business Processes	Considerations
	Terminate for Review Probation Period action in probation reviews.

Reporting

Reports	Considerations
Test Probation Period Eligibility Rules	Enables you to verify the eligibility rules that you create for probation period rules.
Workers with Probation Periods	Displays probation period details for employees with an active probation period on a specified date.
View Document Template Details	Displays document templates for probation letters created with Workday Docs.

Integrations

You can build inbound EIB integrations based on these web services to upload probation periods, rules, and outcomes in bulk:

- *Manage Employee Probation Periods Event*
- *Put Maintain Probation Periods For Country*
- *Put Probation Period Eligibility Rule*
- *Put Probation Period Outcomes*

You can retrieve probation period data and probation period configuration with these web services:

- *Get Probation Periods For Workers*
- *Get Probation Period Eligibility Rules*
- *Get Probation Period Eligibility Rules Without Dependencies*
- *Get Maintain Probation Periods For Country*
- *Get Probation Period Outcomes*

Connections and Touchpoints

Probation periods interact with these other features in Workday:

Features	Considerations
Adding Additional Jobs Job Changes Hiring	You can configure Workday to streamline probation updates during a hire, job change, or additional job. If you configure the *Add Probation Period* step and probation rules, Workday populates the employee's probation length and review date on these business processes: • *Add Additional Job* • *Change Job* • *Hire*
Employment Agreements	You can configure Workday to streamline probation updates for a pre-hire's employment agreement. If you configure the *Initiate Pre Hire Probation Period Details* step and probation rules,

Features	Considerations
	Workday populates these details for the pre-hire on the *Employment Agreement* business process: • Probation length. • Review date.
Workday Docs	You can configure Workday Docs to create document templates for probation letters.

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: Workday Docs

Tasks

Steps: Set Up Workday Docs

Reference

The Next Level: Notice and Probation Periods

Steps: Manage Probation Periods

Prerequisites

- Security: Configure these domains in the Staffing functional area:
  - *Set Up: Staffing*
  - *Worker Data: Probation Periods*
- Configure the *Manage Probation Period* business process and business process policy in the Staffing functional area.

Context

You can set up Workday to streamline probation period updates, enabling you to comply with local regulations and policies by:

- Creating probation period rules to calculate an employee's probation period automatically.
- Setting up probation period reviews to notify you to review an employee's probation period and initiate actions on the outcome.
- Configuring the *Add Probation Period* step on the *Hire*, *Change Job*, and *Add Additional Job* business processes.

Steps

1. Access the Maintain Employee Probation Period Types task.

   Create probation period types.
2. Access the Maintain Employee Probation Period Reasons task.

   You can restrict reasons to a probation period action in the Restricted to Actions prompt.

   Administrators and HR Partners have access to all reasons, including manager reasons. Managers only have access to the reasons that you specify as a Manager Reason.
3. (Optional) Set up probation period rules.

   See Steps: Set Up Probation Period Rules on page 672.
4. (Optional) Set up probation period reviews.

   See Steps: Manage Probation Period Reviews on page 673.

5. (Optional) Maintain Localization Settings on page 144.

   Hide or require probation period localized fields by country.
6. (Optional) Hide or Require Optional Fields.

   Hide or require probation period fields by role on the *Manage Probation Period* business process.
7. (Optional) Configure an alert for upcoming probation end dates.

   See Example: Configure a Probation Period Alert on page 675.
8. (Optional) Enable autocomplete on the *Manage Probation Period* business process definition.

   When you enable autocomplete on the *Manage Probation Period* business process, the *End Probation Period* step completes automatically only:

   - As a subprocess of *Termination*.
   - When the termination date is between the start and end date of the probation period.

Next Steps

You can manage an employee's probation period by selecting Job Change > Manage Probation Periods from an employee's related actions.

Related Information

Concepts

Concept: Workday Docs

Tasks

Add Additional Jobs on page 879

Hide Employees on page 690

Configure Generated Documents

Steps: Set Up Workday Docs

Reference

The Next Level: Notice and Probation Periods

Steps: Set Up Probation Period Rules

Prerequisites

Security: Configure these domains in the Staffing functional area:

- *Set Up: Probation Period Rules*
- *Set Up: Staffing*

Context

You can create probation period rules that populate the probation length when you're adding probation periods to comply with local policies and regulations. You can also use probation period rules to set a maximum probation period for an employee.

Steps

1. Maintain Localization Settings on page 144.

   Activate the *Probation Periods* localized field to enable probation period rules for the countries you select in the Maintain Localization Settings task.

   We recommend that you configure country-specific localized fields when you select *Staffing* from the Area prompt to enable probation period fields and components.
2. Access the Create Probation Period Eligibility Rule task.

   Create eligibility rules for probation period rules.

3. Access the Maintain Probation Periods for Country task.

   Select a Probation Period Eligibility Rule and specify a Duration and Unit in the Probation Period column to determine the probation period length for the rule.

   (Optional) Specify a Duration and Unit for the Maximum Probation Period to display a warning message when you add or edit a probation period that exceeds this length for the rule.

   For information on scheduling a probation review with the Schedule Review (Time before probation end date) column, see Steps: Manage Probation Period Reviews on page 673.

Result

- When you add an employee's probation period, the probation period length automatically populates. You can override the rule by selecting a new Probation Duration and Unit for the probation period length.
- You can only schedule 1 probation review for employees using a probation period rule, but you can manually initiate multiple reviews if no other probation reviews are in progress.

Related Information

Examples

Example: Create Probation Period Rules on page 678

Steps: Manage Probation Period Reviews

Prerequisites

- Security: *Set Up: Staffing* domain in the Staffing functional area.
- Configure the *Manage Probation Period* business process.

Context

You can set up probation period reviews in Workday to:

- Manually schedule and initiate reviews for employees.
- Automatically schedule a review based on probation period rules.
- Automatically initiate related tasks based on the outcome and action that you select during the review.

Steps

1. Edit Business Process Security Policies.

   Set up security for the:

   - Initiating actions on the *Manage Probation Period* business process policy.
   - Initiating actions on the *Review Probation Period* business process policy.
   - (Optional) *Terminate for Review Probation Period* initiating action on the *Termination* business process policy.
2. Create Custom Business Processes.

   Set up the *Review Probation Period* business process.

   Ensure that you configure the relevant steps for actions you want to select during the probation review.

   Add the *Submit Probation Period Review* step to select an outcome and an action during the review.

   If you configure the *Complete Questionnaire* step before the *Submit Probation Period Review* step, you can view questionnaire responses on the *Submit Probation Period Review* step.

3. Maintain Localization Settings on page 144.

   Activate these localized fields in the *Staffing* area of the Maintain Localization Settings task to enable reviews, outcomes, and actions:

   - *Probation Period: Action*
   - *Probation Period: Review*
   - *Probation Period: Outcome*
   - *Probation Periods*
4. Access the Maintain Probation Period Outcomes for Country task.

   Create probation period outcomes and select the available actions.
5. (Optional) Access the Maintain Probation Periods for Country task.

   Specify if probation period rules automatically calculate a review date.

   Example: A probation period rule calculates a worker's probation end date as 2018-09-30. The worker's probation period rule also specifies 1 month in the Schedule Review (Time before probation end date) column. Workday calculates the worker's probation review date as 2018-08-30.

   See Steps: Set Up Probation Period Rules on page 672.

   Security: *Set Up: Probation Period Rules* in the Staffing functional area.
6. (Optional) Hide or Require Optional Fields.

   Hide or require probation review fields by role on these business processes:

   - *Manage Probation Period*
   - *Review Probation Period*
7. (Optional) Add *End Probation Period* as a substep of *Termination* to cancel or edit probation period reviews for employees with a future-dated termination.

   You can cancel reviews only if you:

   - Enable Probation Period: Review on the Maintain Localization Settings task.
   - Select the Disable Probation Review Date check box on the *End Probation Period* step.
8. Activate Pending Security Policy Changes.

Result

- Workday sends a task to My Tasks on the scheduled review date.
- When you initiate the *Review Probation Period* business process, you can select the:
  - Outcome of the probation period.
  - Available action you want to initiate from the outcome.

Next Steps

When you select Job Change > Manage Probation Periods from an employee's related actions, you can select:

- Add, to add a probation period with a review date or override the review date calculated by their probation period rule.
- Start Review, to initiate the *Review Probation Period* business process manually.
- Edit or Extend, to add a new review date.

Related Information

Concepts

Concept: Workday Docs

Tasks

Configure Generated Documents

Steps: Set Up Workday Docs

Concept: Probation Periods

Workday enables you to streamline probation periods according to local regulations and your organization's requirements. You can use probation period functionality to track, evaluate, and perform any necessary actions based on the outcome of the probation period. See: Setup Considerations: Probation Periods.

Probation Period Rules

You can create probation period rules that automatically calculate the length of an employee's probation period. The length of the probation period populates when you add a probation period.

If you configure the Add Probation Period step on these business processes, the rule also populates when you're hiring employee or when an employee changes job:

- *Change Job*
- *Hire*

Probation Period Reviews

You can use probation period reviews to decide on the outcome of an employee's probation period and complete any relevant actions. Workday can automatically calculate a review date for employees when you set up probation period rules.

You can manually initiate multiple reviews for an employee, but you must complete any existing *Review Probation Period* events for the employee before initiating a new review. If a probation rule schedules a review date for an employee with another in-progress *Review Probation Period* event, Workday still sends a task to My Tasks so you can initiate the review.

When you cancel the *Review Probation Period* business process, Workday:

- Cancels all *Review Probation Period* events and related events that are in progress.
- Doesn't rescind any *Review Probation Period* events or related events that are complete.

When you rescind the *Review Probation Period* business process, Workday:

- Rescinds all *Review Probation Period*, *Edit Probation Period*, and *Extend Probation Period* events.
- Doesn't rescind any *Change Job for Review Probation Period* or *Terminate for Review Probation Period* events.

Related Information
Reference
The Next Level: Notice and Probation Periods

Example: Configure a Probation Period Alert

This example illustrates how to set up an alert based on expiring probation periods.

Context

You want to inform managers in advance about a worker's probation period ending, so the manager can perform any necessary actions. You configure a weekly alert that provides a report listing workers with probation end dates occurring in the next 21 days.

Steps

1. Access the Create Calculated Field task.

   As you complete the task, consider:

Field Name	Business Object	Function	Lookup Field	Return Value
Worker for Probation Period	Employee Probation Period	Lookup Related Value	Position for Probation Period	Worker

2. Access the Create Custom Report task.

   As you complete the task, consider:

Option	Description
Report Name	Enter *Expiring Probation Periods*.
Report Type	Select *Advanced*.
Data Source	Select *Probation Periods for Workers*.
Temporary Report	Ensure this is clear.

3. On the Edit Custom Report task, select *Alerts* from the Report Tags prompt.
4. As you complete the Columns tab, add these rows:

Business Object	Field
Employee Probation Period	Worker for Probation Period
Employee Probation Period	Position at Probation Period Start
Employee Probation Period	Probation Start Date
Employee Probation Period	Probation End Date
Employee Probation Period	Probation Extended End Date

5. Create a calculated field for the report on the Filter tab:
   a. Select *Create > Create Calculated Field for Report* from the Field prompt.
   b. Enter *Current Date + 21 Days* in Field Name.
   c. Select *Increment or Decrement Date* from the Function prompt.
   d. On the Calculation tab, select *Current Effective Date* from the Date Field prompt.
   e. Select *21* from the Days to Add or Subtract prompt.
   f. Click OK.
6. Remove the row that Workday automatically populates in the Filter tab.
7. Add these rows on the Filter tab:

And/Or	(	Field	Operator	Comparison Type	Comparison Value	)
And	(	Probation End Date	less than or equal to	Value from another field	Current Date + 21 Days	
And		Probation End Date	greater than	Value from another field	Current Entry Date	)

And/Or	(	Field	Operator	Comparison Type	Comparison Value	)
Or	(	Probation Extended End Date	less than or equal to	Value from another field	Current Date + 21 Days	
And		Probation Extended End Date	greater than	Value from another field	Current Entry Date	)

8. To save the report, click OK.
9. Access the Configure Alert task.
10. As you complete the task, consider:

Option	Description
Report Name	Select *Expiring Probation Periods*.
Run Frequency	Select *Weekly Recurrence*.
Request Name	Enter a unique name for the alert. Example: Expiring Probation Periods Alert.

11. As you complete the Alert Configuration tab, consider:

Option	Description
Notification Type	Select *General Notifications*.
Effective Date	Select *Determine Value at Runtime* from the Value Type column and *Today* from the Value column.
Group(s)	Select the security Group(s) you want to receive this alert. Example: *Manager*.
Subject	Enter the subject for the alert. Example: Probation Periods Expiring.
Body	Enter a description for the alert. Example: The probation period for these workers is expiring in 21 days.
Details	Select the Field option and select the *Worker for Probation Period* calculated field from the prompt.

12. On the Schedule tab, consider:

Option	Description
Recurs Every x Week(s)	Enter 1.
Day(s) of the Week	Select the day of the week that you want to receive the alert. Example: *Monday*.
Start Time	Select a start time. Example: *9.00 AM*.
Time Zone	Select a time zone. Example: *GMT-08:00 Pacific Time (Los Angeles)*.
Start Date	Select the date when you want the alert to begin.
End Date	Select the date when you want the alert to end.

Result

Workday sends the alert to the *Manager* security group every week on Monday with a report of probation periods ending in 21 days. The alert displays in the *Alert Notification* category under Process Monitor.

Related Information
Concepts
Concept: Alerts
Concept: Calculated Fields
Tasks
Create Custom Reports
Create Calculated Fields

Example: Create Probation Period Rules

This example illustrates how to create a probation period rule based on an employee type.

Context

You want to calculate a default probation period of 3 months automatically for regular employees in Germany. You also want to specify their maximum probation period as 6 months. You create a condition rule and define a default and maximum probation period.

Steps

1. Access the Maintain Localization Settings task.
2. Select *Staffing* from the Area prompt.
3. Click OK.
4. For the Probation Periods localized field, select *Germany* from the Allow for Countries or Regions prompt, and select the Active check box.
5. Click OK and Done.
6. Access the Create Probation Period Eligibility Rule task.

   Create this condition rule enclosed in parentheses:

Field	Value
Description	*Regular Employees*
Source External Field or Condition Rule	*Employee Type (Probation Period)*
Relational Operator	*in the selection list*
Comparison Value	*Regular*

7. Click OK.
8. Access the Maintain Probation Periods for Country task.
9. Select *Germany* from the Country prompt.
10. Click OK.
11. Add this row to create a probation period rule:

Field	Value
Probation Period Eligibility Rule	*Regular Employees (has exceptions)*
Probation Period	Enter 3 for the Duration field and select *Month(s)* from the Unit prompt for the default probation period.

Field	Value
Maximum Probation Period	Enter 6 for the Duration field and select *Month(s)* from the Unit prompt for the maximum probation period.

12. Click OK and Done.

Result

- When you add a probation period for regular employees in Germany, Workday automatically calculates their probation period as 3 months.
- Workday automatically adjusts the probation period based on your selection. Example: If the end of an employee's probation period is set as March 26 but you've selected an End of Month adjustment, Workday readjusts the final date of their probation period to March 31.
- If you add a probation period that's greater than 6 months, a warning message displays.

Related Information
Tasks
Steps: Set Up Probation Period Rules on page 672

Notice Periods

Setup Considerations: Notice Periods

You can use this topic to help make decisions when planning your configuration and use of notice periods. 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

In Workday, you can define notice periods for employees and pre-hires to populate notice periods on a worker's profile and during a termination or resignation.

Business Benefits

You can easily maintain country-specific notice periods, helping you to comply with local regulatory requirements. You can increase efficiency and reduce manual effort by creating rules to populate notice periods for pre-hires and employees.

Use Cases

- Track and report on notice periods for employees and employers.
- Create different notice periods for employers and employees based on whether the termination reason is voluntary or involuntary.
- Populate notice periods for employees during a termination or resignation.

Questions to Consider

<table>
<tr><td>Questions</td><td>Considerations</td></tr>
<tr><td>What criteria in your organization do you use to determine a worker's notice period?</td><td>You can define country-specific periods to populate based on criteria in relevant business processes by:
Creating rules that populate the notice period.
Entering the notice period manually.
The employer notice period applies when the termination reason is involuntary. The employee notice period applies when the termination reason is voluntary.

If you create rules based on factors such as length of service, Workday automatically updates any new notice period rule that applies to the employee.

If you create notice period rules, you can override the rule at any time by entering a different notice period. If you override the notice period rule, Workday won't automatically update any new rules that the employee becomes eligible for.</td></tr>
<tr><td>Do you want to exclude certain employees from having a notice period?</td><td>If you have enabled notice periods for a country, you can exclude certain employees from having a notice period in that country. You can create a rule for the group of employees with the Has Notice Period check box cleared on the Maintain Notice Periods for Country task.</td></tr>
<tr><td>How do you want to calculate the employee's last day using the notice period?</td><td>You can define a notice period in days, weeks, or months. Workday calculates the employee's recommended last day based on:
The notice period start date and the employee's notice period, if you enabled Notice Period Start Date for the employee's work location country.
The notification date of the resignation or termination and the employee's notice period, if you haven't enabled Notice Period Start Date for the employee's work location country.
You can select a different termination date from the recommended termination date.</td></tr>
<tr><td>How is an employee's notice period calculated when you change the primary position of the employee?</td><td>Workday calculates an employee's notice period based on the country or country region of the primary position. If the eligibility changes with the change in the primary position, the notice periods will dynamically update unless you assign custom notice periods to the employee.</td></tr>
</table>

Questions	Considerations
Do you want to include the notification date within the notice period?	You can configure a localized field to include the notification date within the length of the notice period. Example: If the employee's notice period is 14 days and the notification date is September 1, Workday calculates the proposed termination date as September 14.
Do you need to adjust the notice period to a certain point in time, such as the end of month?	You can configure a localized field to adjust notice periods to a point in time, helping you to comply with certain regulatory requirements. Example: An employee has a notice period of 2 weeks with an adjustment that calculates the notice period length until the end of the month. If the employee resigns on September 1, their recommended last day of work is September 30.

Recommendations

Workday recommends that you:

- Configure the *Edit Notice Periods* step on available business processes to streamline updates to notice periods.
- If you're using employment agreement as part of the Recruiting workflow, configure the *Edit Notice Periods* step on the Hire and Change Job business processes to update a custom notice period from employment agreement to HCM Core.
- Configure the *Edit Notice Period* step before the *Completion* step on the *Hire* business process to enable notice periods for pre-hires with an in-progress hire event.
- Configure country-specific localized fields to enable notice periods and notice period fields.
- Place notice period rules that exclude employees from notice periods at the top of the grid in the Maintain Notice Periods for Country task. Workday then applies those rules to the employees first.

Requirements

Configure the *Notice Periods* localized field to use notice period functionality.

Limitations

You can't:

- Enable employees to view their own notice periods.
- Define notice periods for contingent workers.

Tenant Setup

No impact.

Security

Domains	Considerations
Employment Agreement: Notice Periods in the Pre-Hire Process and Recruiting functional areas.	Users secured to this domain can view or modify notice periods in employment agreements.

Domains	Considerations
Set Up: Notice Period Rules in the Staffing functional area.	Users secured to this domain can create and manage notice period rules.
Worker Data: Notice Periods in the Staffing functional area.	Users secured to this domain can view or modify notice period data for employees.
Staffing Actions: Termination Notice in the Staffing functional area.	Users secured to this domain can view or modify notice period information during a termination.

Business Processes

Business Processes	Considerations
Change Job *Hire*	You can add the *Edit Notice Periods* step to these business processes to streamline notice period updates for employees and pre-hires with an in-progress hire event.
Edit Notice Periods	Enables you to maintain notice period details for employees and pre-hires with an in-progress hire event as a standalone business process.
Pre-Hire Notice Period Details	Enables you to maintain notice period details for the *Initiate Pre-Hire Notice Period Details* step on the *Employment Agreement* business process.
Submit Resignation *Termination*	Workday calculates a recommended termination date or proposed termination date based on the notification date and employee's notice period.

Reporting

Reports	Considerations
Test Notice Period Eligibility Rule	Enables you to verify eligibility rules that you create for notice period rules.
View Notice Periods	Displays the notice period for an employee.
View Notice Periods for Country	Displays the notice period rules for a country.

You can use report fields for custom reports on these business objects:

- Employee
- Notice Period
- Notice Period Event

Integrations

You can use these web services to upload notice periods and notice period rules in bulk:

- *Put Edit Notice Period Event*
- *Put Maintain Notice Periods For Country*
- *Put Notice Period Eligibility Rule*

You can retrieve notice period data and notice period rules with these web services:

- *Get Notice Periods*

- *Get Maintain Notice Periods For Country*
- *Get Notice Period Eligibility Rules*
- *Get Notice Period Eligibility Rules Without Dependencies*

Connections and Touchpoints

Features	Considerations
Employment Agreements	If you use notice periods in employment agreements, you can manage notice periods for pre-hires.
Payroll	DSN reporting in Payroll (FRA) requires information on an employee's notice period to calculate the amount of paid and worked notice.

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
Reference
The Next Level: Notice and Probation Periods

Steps: Manage Notice Periods

Prerequisites
Configure the *Edit Notice Periods* business process and business process policy in the Staffing functional area.

Context

You can set up Workday to add voluntary and involuntary notice periods for employees and add notice periods for pre-hires with an in-progress hire event. You can also streamline country-specific notice period updates to comply with local regulatory requirements by creating notice period rules. Notice period rules can be based on a range of milestones such as length of service or the employee's termination reason.

Steps

1. Maintain Localization Settings on page 144.

   Activate the *Notice Periods* localized field to enable notice periods.

   (Optional) Activate these localized fields:

   - *Notice Periods: Adjustments* to enable adjustments for notice periods that adjust the notice period to specific points in time.
   - *Notice Periods: Include Notification Date in Notice Period* to include the day that the notice is received in the notice period length.
   - *Notice Period Start Date* to include the day the notice period starts.
2. Edit Domain Security Policies.

   Configure these domains in the Staffing functional area:

   - *Worker Data: Notice Periods* domain for reporting on notice period details.
   - *Staffing Actions: Termination Notice* domain for access to notice periods in the *Termination* business process.

   Configure the *Employment Agreement: Notice Periods* domain in the Pre-Hire Process functional area.

3. ../../../../authentication-and-security/configurable-security/security-policies/dan1370796362110.dita.

   Configure the *Pre-Hire Notice Period Details* business process policy to maintain notice period details for the *Initiate Pre-Hire Notice Period Details* step on the *Employment Agreement* business process.
4. Activate Pending Security Policy Changes.
5. (Optional) Steps: Set Up Notice Period Rules on page 684.
6. ../../../../manage-workday/business-processes/customize-business-processes/dan1370797384762.dita.

   Configure the *Edit Notice Periods* step on the *Hire* and *Change Job* business processes. The Edit Notice Periods step has a condition rule that initiates the step when these requirements are met:

   - The country of the proposed location has an active *Notice Periods* localization.
   - An employee has an existing custom notice period.

   To assign notice periods for pre-hires with an in-progress hire event, configure the *Edit Notice Period* step on the *Hire* business process before the *Completion* step.

   Configure the *Initiate Pre-Hire Notice Period Details* step on the *Employment Agreement* business process.

Result

- You can maintain notice periods for an employee by selecting Job Change > Edit Notice Periods from an employee's related actions menu.
- Based on an employee's notice period and Notification Date, Workday calculates the:
  - Recommended Termination Date in the *Submit Resignation* business process.
  - Proposed Termination Date in the *Termination* business process.
- You can edit notice periods for pre-hires with an in-progress hire event, and the notice period will populate from an eligibility rule, if applicable.
- You can view or modify notice periods in employment agreements.

Related Information
Reference
The Next Level: Notice and Probation Periods

Steps: Set Up Notice Period Rules

Prerequisites

Security: Configure these domains in the Staffing functional area:

- *Set Up: Notice Period Rules*
- *Set Up: Staffing*

Context

You can create country-specific notice period rules that automatically determine a worker's notice period, enabling you to more efficiently comply with local policies and regulations.

Steps

1. Maintain Localization Settings on page 144.

   Activate the *Notice Periods* localized field to enable notice period rules for the countries in which you want to create notice period rules.
2. Access the Create notice Period Eligibility Rule task.

   Create eligibility rules for notice period.
3. Access the Maintain Notice Periods for Country task.

4. As you complete the task, consider:

Option	Description
Notice Period Eligibility Rule	Select an eligibility rule.
Has Notice Period	If you have enabled notice periods for a country, you can exclude certain employees from having a notice period in that country by clearing this check box. To create an exclusion rule for an employee, clear this check box and select the Employee (Voluntary) check box.
Employee (Voluntary) Employer (Involuntary)	Select if the eligibility rule applies to the Employee, Employer, or both. Workday evaluates the Employee and Employer notice period rules separately. Example: You create 2 rules: An exclusion rule for Employee and a notice period rule for Employer. When you edit an employee's notice period, Workday won't display the Employee Notice Period (Voluntary) section. Instead, the Employer Notice Period (Involuntary) section will display, and it populates values from the first rule that the employee is eligible for and applicable to the employer.
Duration	Enter the notice period duration.
Unit	Select a unit for the notice period duration.

Workday selects the first notice period rule from the grid that an employee is eligible for. Workday recommends that you arrange the rows with exclusion rules at the top of the grid.

Result

Workday automatically calculates your employee's proposed or recommended termination date from the notification date according to the employee's notice period rule when:

- Your employee resigns using the *Submit Resignation* business process.
- You terminate your employee using the *Termination* business process.

Example: Create Notice Period Rules

This example illustrates how to create a notice period rule based on the primary termination reason.

Context

You want to create a notice period rule that automatically calculates 1-week notice if the primary termination reason for an employee in France is poor job performance. You create a condition rule and define the notice period.

Prerequisites

Configure primary termination reasons.

Steps

1. Access the Maintain Localization Settings task.
2. Select *Staffing* from the Area prompt.

3. Click OK.
4. For the Notice Periods localized field, select *France* from the Allow for Countries or Regions prompt, and select the Active check box.
5. Click OK and Done.
6. Access the Create Notice Period Eligibility Rule task:

   Create this condition rule enclosed in parentheses:

Field	Value
Description	*Poor Job Performance*
Source External Field or Condition Rule	*Primary Termination Reason (Notice Period)*
Relational Operator	*in the selection list*
Comparison Value	*Terminate Employee > Involuntary > Poor Job Performance*

7. Click OK.
8. Access the Maintain Notice Periods for Country task.
9. Select *France* from the Country prompt.
10. Click OK.
11. Add this row to create a notice period rule:

Field	Value
Notice Period Eligibility Rule	*Poor Job Performance*
Employer (Involuntary)	Select this check box.
Duration	*1*
Unit	*Week(s)*

12. Click OK and Done.

Result

When you're terminating an employee with the Terminate Employee task and select *Involuntary > Poor Job Performance* from the Primary Reason prompt, Workday automatically calculates the notice period as 1 week after the Notification Date.

Example: Create a Notice Period Rule for Length of Service

This example illustrates how to create a notice period rule based on employee length of service.

Context

You want to calculate a 2-week notice automatically when the length of service for an employee in Germany is 36 months. You create a condition rule and define the notice period.

Prerequisites

Security:

- These domains in the Staffing functional area:
  - *Set Up: Notice Period Rules*
  - *Set Up: Staffing*
- *Set Up: Tenant Setup - Global* in the System functional area.

Steps

1. Access the Maintain Localization Settings task.
2. Select *Staffing* from the Area prompt.
3. Click OK.
4. For the Notice Periods localized field, select *Germany* from the Allow for Countries or Regions prompt, and select the Active check box.
5. Click OK and Done.
6. Access the Create Notice Period Eligibility Rule task.
7. For Description, enter *Length of Service*.
8. Create this condition rule:

Source External Field or Condition Rule	Relational Operator	Comparison Value
Length of Service in Months (Notice Period)	*equal to*	*36*

9. Click OK.
10. Access the Maintain Notice Periods for Country task.
11. Select *France* from the Country prompt.
12. Click OK.
13. Add this row to create a notice period rule:

Notice Period Eligibility Rule	Employer (Involuntary)	Duration	Unit
Length of Service	Select the check box.	*2*	*Week(s)*

14. Click OK and Done.

Result

When you terminate an employee with more than 36 months of service on the Terminate Employee task and select an involuntary Primary Reason, Workday automatically calculates the notice period as 2 weeks after the notification date.

Hire and Terminate

Steps: Hire Inactive Students and Inactive External Students

Prerequisites

- Create jobs or positions.
- Manage inactive student or inactive external student records.

Context

Workday enables you to hire these worker types using the Hire Employee task, enabling you to take advantage of their workforce potential:

- Inactive external students.
- Inactive students.

Steps

1. Edit Domain Security Policies.
    a) Select the Staffing functional area.
    b) Configure access to the *External Student Data: Student Public Reports* domain security policy.
    c) Select the Student Core functional area.
    d) Configure access to the *Student Data: Student Profile* domain security policy.
2. Edit Business Process Security Policies.

    Select the Staffing functional area. Configure any of these *Hire Employee* initiating actions on the *Hire* business process:

    - Search for pre-hires, former workers, inactive students, or inactive external students.
    - Hire an employee from the related actions menu of a pre-hire, former worker, inactive student, or inactive external student.
    - Search for existing pre-hires, former workers, inactive students, inactive external students, or create a new pre-hire.

Next Steps

Access the Hire Employee task to hire an inactive student or inactive external student.

Related Information
Steps: Hire Inactive Students and Inactive External Students

Steps: Set Up No Shows

Context

You can configure the *No Show* business process to enable users to report employees who don't come on their first day of work. Once reviewed, the *No Show* business process rescinds the *Hire* event of the worker. You can configure this business process to stop some downstream processes and integrations that are related to the worker's *Hire* event. The specific processes Workday is able to stop depends on:

- The configuration of your organization.
- How far along these processes are when you complete the *No Show* event.

The *No Show* event enables you to mark a worker as a *No Show* on their pre-hire record. Workday can automatically inform hiring managers when they attempt to hire a worker who was previously a no show. You can also mark the worker as a *No Show* directly on their pre-hire record without initiating the business process.

You can use the Maintain Event Categories and Reasons task to add a reason for the no show to the business process.

You can only use the *No Show* business process for employees, not contingent workers.

Steps

1. Edit Business Processes.

    Ensure that the *Review and Complete No Show* step is the *Complete* step on the *No Show* business process. Add any approval steps before the *Complete* step.

    You can configure the *No Show* business process to stop some downstream processes related to the worker within Workday. Use the *Hire Rescinded* integration attribute on the *Core Connector: Worker* integration to inform third-party processes. The ability to cancel events can depend on the frequency of integration updates, as well as how quickly you can report and complete the *No Show* event.
2. Maintain Localization Settings on page 144.

    Configure localization settings for the Mark as No Show field on the *No Show* business process.

3. Edit Domain Security Policies.

   Configure the No Show Event Detail report secured to the *Staffing Actions: No Show* domain.
4. (Optional) Add Dashboard Menus.

   You can add *No Show* events to the *My Team Management* dashboard. That enables managers to keep track of the no shows they report.
5. (Optional) Create Integration (Step).

   You can configure an integration step for the *No Show* business process that enables you to use integration events associated with no shows.

Steps: Set Up Hire

Context

You can hire a pre-hire or former worker into a job or position in your organization using the Hire Employee task.

Steps

1. (Optional) Hide or Require Optional Fields .

   Configure optional fields for the *Hire* business process so that they are hidden, view-only, or required for specific users and security groups.
2. Edit Business Process Security Policies.

   Configure the security policy for the *Hire* business process in the Staffing functional area. Any security groups that you assign to the initiating action can create a pre-hire, and hire a pre-hire or former worker. To track additional data for new hires, add custom fields to the business process.
3. Edit Business Processes.

   Configure the *Hire* business process in the Staffing functional area. To enable workers to access Workday tasks and objects in English when the tasks and objects aren't translated in the workers' preferred languages, enable Allow Mixed-Language Transactions when you configure the Create Workday Account service step in your business process. See ../../../authentication-and-security/accounts/workday-accounts/dan1370796453062.dita.
4. ../../../authentication-and-security/configurable-security/security-policies/dan1370797389950.dita.

   Set up the security policies for the Pre-Hire Data: Contact Information domain in the Pre-Hire Process functional area.
5. (Optional) Create a consolidated *Hire* experience.

   If you experience difficulty setting up this feature and its security, we recommend that you work with a Workday-certified implementer or contact your named Support contact to engage Professional Services.
6. (Optional) Hide or Require Optional Fields.

   Hide or require optional fields on the *Hire* business process.
7. (Optional) Create Custom Notifications.

   Set up email notifications to personal or work email addresses.

   You can override the email template. If you use Notification Designer, you can create a template and enable it for the *Custom Business Process* notification category. You can use the notification template to send notifications when using the *Hire* business process.

Related Information

Tasks

Set Up Security to Autocomplete Staffing Events on page 523
Steps: Set Up Custom Staffing Fields on page 539

Hire Employees

Prerequisites

- Select an ID definition, configure job requisitions, and specify whether to permit overrides of hiring restrictions on the Edit Tenant Setup - HCM task.
- Create jobs or positions.
- Create categories and reasons for hiring employees on the Maintain Event Categories and Reasons task.
- Configure optional fields for the Search for Person andSearch Results interfaces of the Hire Employee task:
    - Each field is secured through existing domain or security constraints.
    - Additional worker data is secured through terminated worker security. Terminated workers' information only displays if you're part of a security group that has access to terminated worker information. See: FAQ: Terminations on page 715.

Context

You can hire a pre-hire or former worker into a job or position in your organization. This position automatically becomes the worker's primary position.

If you use job requisitions, confirm that you have an open and approved job requisition.

When completing the hiring details, many of the fields populate with values defined on the job profile, position or job requisition. If you use job requisitions, you can't change those values; update the job requisition itself.

Steps

1. Access the Hire Employee task.
2. As you complete the task, consider:

Option	Description
Hire Date	Select a date that's on or after the: • Recruiting Start Date on the requisition if you use job requisitions. • Earliest Hire Date on the position if you don't use job requisitions.
Reason	Only reasons for the *Hire* event are available. If you're automating the benefit enrollment process for new employees, Workday suggests you select a hire reason in this field.
First Day of Work	Populates from the Hire Date, but you can change it. Correcting the Hire Date automatically corrects this date.
End Employment Date	Available when you assign the worker to a fixed-term employee type in the Employee Type field. If you configured your tenant to synchronize employment and contract end dates, Workday

Option	Description
	populates this date whenever the employee's end date for their contract changes.
Position	For position management organizations, select: • (If you use job requisitions), a position with an open, approved job requisition, and a Recruiting Start Date that's on or after the current date. • (If you don't use job requisitions), a position or job with an Availability Date that's on or after the current date.
Job Requisition	Based on selections on the Edit Tenant Setup - HCM task. If you selected: • Enable Job Requisitions for Job Management, select Job Management. • Require Job Requisitions for All Position Management staffing events, you must make a selection for Position Management. • Enable Job Requisitions for Position Management based on rules, make a selection based on exit conditions defined on the *Hire* business process. Requires a job requisition if defined on the *Hire* business process. Example: An exit condition requires job requisitions for all hiring in Canada, but not elsewhere.
Employee Type	If the type is for fixed-term employees, specify an End Employment Date.
Location	Select from the locations you specified on the Create Position or Set Hiring Restrictions task, or from the primary or additional locations on the job requisition.
Work Space	Select from the work spaces (such as building, floor, or cubicle) associated with the Location.
Job Profile	Select from the profiles you specified on the Create Position or Set Hiring Restrictions task, unless you allow overrides at the tenant level.
Job Title	Populates from the Job Profile.
Business title	Populates from the Job Title. You can control the display of business titles by enabling the *Worker Data: Business Title on Worker Profile* domain security policy in the Staffing functional area.
Pay Rate Type	Select from the pay rate types available for the country associated with the Location.

Option	Description
Job Category	Populates from the Job Profile.
Job Classifications	Populates from the Job Profile.
Management Level from Job Profile	Populates from the Job Profile.
Additional Job Classifications	Select classifications as needed.
Company Insider Types	Select from the types associated with the Job Profile. Define company insider types on the Maintain Company Insider Types task. Assign them to a job profile on the Edit Job Profile task.
Workers' Compensation Code from Job Profile	Populates from the Job Profile.
Workers' Compensation Code Override	Select an override for the compensation code.
Appointment Type	This field displays when you configure it on these tasks: • Maintain Appointment Type • Configure Optional Fields This functionality supports US Federal agency requirements for classifying positions. You can also use the field for organizations that aren't related to US Federal by configuring custom field values.
Employee Tenure	This field displays when you configure it on these tasks: • Maintain Employee Tenure • Configure Optional Fields This functionality supports US Federal agency requirements for classifying positions, and Personnel Action Request (PAR) processing. You can also use the field for organizations that aren't related to US Federal by configuring custom field values.
Annuitant Indicator	This field displays when you configure it on these tasks: • Maintain Annuitant Indicator • Configure Optional Fields This functionality supports US Federal agency requirements for classifying positions, and Personnel Action Request (PAR) processing. You can also use the field for organizations that aren't related to US Federal by configuring custom field values.
Time Type	Select from the types you specified on the Create Position or Set Hiring Restrictions task, unless you allow overrides at the tenant level.

Option	Description
	Populates from the value defined on the job profile.
Time Type Subtype	This field displays when you configure it on these tasks: • Maintain Time Type Subtype • Configure Optional Fields This functionality supports US Federal agency requirements for classifying positions, and Personnel Action Request (PAR) processing. You can also use the field for organizations that aren't related to US Federal by configuring custom field values.
Scheduled Weekly Hours	Populates from a rule when: • You've defined a working time rule. • The data populated on the task applies the rule. Populates from the Default Weekly Hours if there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position.
Location Weekly Hours	Displays the standard weekly hours associated with the Location.
Default Weekly Hours	Populates from a rule when: • You've defined a working time rule. • The data populated on the task applies the rule. Populates from the Location Weekly Hours field if there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position.
FTE	Calculated by dividing the Scheduled Weekly Hours by the Default Weekly Hours. This value displays as a percentage.
Specify a Paid FTE	Available when you enable Paid FTE on the Maintain Localization Settings task.

Option	Description
Paid FTE %	You can enter a percentage that overrides the FTE field for use in your Workday Compensation and Workday Payroll calculations. Available when you enable Paid FTE on the Maintain Localization Settings task.
Specify a Working FTE	Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Working FTE %	Used in custom reporting. Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Work Shift	Available when you enable Work Shift on the Maintain Localization Settings task. Available when you select the Work Shift Required check box on the job profile. Define the work shifts for a location using the Maintain Work Shifts task.
Frequency	Select from the working time frequencies you specified on the Maintain Frequencies task. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Unit	Select from the preconfigured options of hours or days. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Value	Enter the duration of the working time in selected units. Automatically populates to zero. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Continuous Service Date	Populates from the Hire Date, but you can change it. Correcting the Hire Date automatically corrects this date.
Benefits Service Date	Enables you to track length of service for benefit programs. Example: Workers become eligible for insurance after a 3-month probation period. Available for use in user-defined calculations and eligibility rules. Workday empties the field during rehire.

Option	Description
	This service date only applies to employees.
Company Service Date	Enables you to track an additional service date, such as date of acquisition. Available for use in user-defined calculations and eligibility rules. Workday empties the field during rehire. This service date only applies to employees.

Result

Workday:

- Assigns the *Employee as Self* and *All Employees* security groups to the employee. If the Hire Date is in the future, Workday places the employee into the *Pre-Employee as Self* security group until the hire date.
- Displays results for workers that:
  - Have a future contract date.
  - Have a future hire date.
  - Have an in-progress contract or hire date.
  - Are not eligible for hire.
- Filters out active workers who don't have a termination date, and limits the results to 100.
- Prevents you from selecting the check box for workers who aren't eligible for hire and provides additional help text.
- Sets the status of the position and job requisition (if applicable) to *Filled*.

Next Steps

You can assign a worker to additional jobs or positions on the Add Job task. Worker-related events, such as paychecks and time off, are based on the primary job or position. You can change the worker's primary job or position on the Switch Primary Job task.

If you can access the *Worker Data: Current Staffing Information* domain, you can only see workers whose Hire Date is in the future .

Correct or reverse a hire. From the employee's related actions menu, select Worker History > View Worker History, and select either Correct or Rescind from the related actions menu of the *Hire* event. If the worker's position had a job requisition, it reopens when you rescind the event.

If you rehire a former employee and that employee still has an active user account, Workday doesn't automatically disable that former employee's Workday account if you rescind a hire event for them.

You can also correct the Hire Date and Reason for multiple employees using the Mass Correct of Hire task.

If necessary, correct or remove the status of a rehired employee. Examples:

- You terminated Maria while she was on a leave of absence. Because the leave type inactivates the employee, Maria's rehire employee status is also inactive.
- Tom is a retiree, but no longer eligible for retiree status. Correct the status on the Remove Retiree Status task.

We use the Hire Date to calculate the Next Anniversary date on the Anniversaries for this week and next report.

Related Information

Concepts

Setup Considerations: Worker Start Date Corrections on page 933
Concept: Opt-In Features
Concept: Rehire Former Workers on page 117
Concept: Updating Effective-Dated Custom Object Data
Setup Considerations: Autocomplete Staffing Events on page 519
Concept: Hire Employee Initiating Actions on page 708
Concept: Workday Docs

Tasks

Rehire a Retiree on page 972
Convert Contingent Workers to Employees on page 735
Add Additional Jobs on page 879
Steps: Set Up Worker Onboarding on page 746
Correct Hire Date and Reason for Multiple Employees on page 940
Hide or Require Optional Fields

Steps: Set Up Employee Resignation

Context

You can configure Workday to provide field level guidance to employees as they submit their resignation through self-service and without the need for additional support. Users can access the Worker Information side panel on resignation tasks as they review or approve a resignation for their organization.

If you enable notice periods for employees' work location country, then you can track their resignation notification dates and applicable notice periods. Workday uses this information to suggest a proposed termination date.

Workday enables you to track employee resignation reasons and termination reasons separately.

Contingent workers can't submit a resignation.

Steps

1. Access the Maintain Event Categories and Reasons task.

   Configure reasons for the *Worker Resignation* business process.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
2. Create Custom Business Processes.

   Configure the *Submit Resignation* business process in the Staffing functional area. If the reason is confidential or a management issue, you can add a condition rule on the business process approval step that routes to the HR Partner.
3. Edit Business Process Security Policies.

   - Configure the *Submit Resignation* business process security policy in the Staffing functional area. Add the Employee as Self security group to the Submit Resignation initiating action.
   - Update the *Termination* business process security policy by adding security groups to the Terminate from Submit Resignation initiating action. Only the roles listed in this group receive the *Review Worker-Initiated Termination* step when the termination is due to a resignation.
4. (Optional) Hide or Require Optional Fields.

Result

Employees can resign by selecting Job Change > Resign from the related actions menu of their worker profile. When the *Submit Resignation* business process completes, Workday initiates the *Termination* business process.

Related Information

Tasks

Terminate Employees on page 699

Steps: Manage Notice Periods on page 683

Steps: Set Up Termination

Context

Complete the necessary configuration steps before initiating the termination process.

Steps

1. Create Custom Business Processes.

   Configure the *Termination* business process in the Staffing functional area. Example: You can synchronize termination and return from leave dates for employees terminated while on leave. Add a *Service* step after the completion step and specify Automated Leave Processing.
2. Edit Domain Security Policies.

   Set up the security policies for these domains in the Staffing functional area:

Option	Description
Staffing Actions: Termination Details	Provides access to termination dates and reasons.
Staffing Actions: Termination Notice	Provides access to information relating to notice periods.
Staffing Actions: Termination Regrettable	Provides access to information about whether the termination of an employee is regrettable for your organization. You can use the Configure Optional Fields and the Maintain Localization Settings tasks to hide or require the field.
Staffing Actions: Termination Rehire Eligibility	Provides access to an employee's rehire eligibility status upon termination.
Staffing Actions: Termination Additional Details	Provides access to additional details, usually entered by the administrator. These details can include resignation, severance, and ROE details.
Staffing Actions: Termination Position Details	Provides access to information about whether: • A position closes upon an employee's termination. • The position is available for overlap.

3. Edit Business Process Security Policies.

   If you want to allow employees to resign, add security groups to the Terminate from Submit Resignation initiating action.

4. Access the Maintain Termination Categories task.

   Define categories and reasons for terminating employment.

   You can select an option from the Eligible for Rehire column to populate the Eligible for Rehire field based on the termination reason during the *Termination* business process.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
5. (Optional) Enable managers to enter local reasons for terminating employment when completing the *Termination* business process.
   a) Access the Maintain Local Termination Reasons task.

      Create local termination reasons by country.

      Security: *Set Up: Staffing* domain in the Staffing functional area.
   b) Maintain Localization Settings on page 144

      Allow and require the *Local Termination Reason (Worker)* field for the selected countries. To activate your settings, select the Active check box.

      Example: You make the *Local Termination Reason* field:

      - Required for workers terminated in Canada.
      - Optional for USA workers.

      Security: *Set Up: Tenant Setup - Global* domain in the System functional area.
6. (Optional) Set up notice periods for employees.

   See Steps: Manage Notice Periods on page 683.
7. (Optional) Add the *End Payroll Inputs* business process on the *Termination* business process to enable ending ongoing payroll inputs when terminating workers.

   See Steps: Set Up End Payroll Inputs for Terminated Workers.
8. (Optional) Enable people other than payroll administrators (such as HR partners) to provide final payslips to workers.

   See Steps: Set Up Decentralized Processing for On-Demand Payments.
9. (Optional) Enable autocomplete on the *Employee Contract* business process definition.

   For employees with existing contracts, ensure you populate a contract status for the *Termination* business process to complete the *Maintain Employee Contract* step on the termination date.

   See Steps: Set Up Employee Contracts on page 656.
10. (Optional) Enable autocomplete on the *End Collective Agreement Assignment* business process definition.

    Workday automatically completes the *End Collective Agreement Assignment* step on the termination date if the employee has an existing collective agreement.
11. (Optional) Enable autocomplete on the *Manage Probation Period* business process definition.

    Workday automatically completes the *End Probation Period* step on the termination date if the termination date is between the start and end date of a probation period.
12. (Optional) Set up job overlap for vacating positions.

    Steps: Set Up Job Overlap on page 907.

Next Steps

Access the Template-Driven Business Process Security report to confirm that you've aligned the *Termination* business process and domain security permissions.

Related Information

Concepts

Concept: Workday Docs

Terminate Employees

Prerequisites

- Configure the *Termination* business process and security policy in the Staffing functional area.
- End additional jobs or positions.
- If you want to pay out a severance package with Workday Payroll, set up and assign severance packages.
- You can hide or require optional fields on the *Termination* business process.

Context

End an employee's primary job or position within an organization.

If you want to track additional data for terminations, you can add custom fields to the business process.

You can track the termination notification date and applicable notice period if you enabled notice periods for the employee's work location country. Workday recommends a termination date that meets notice period guidelines using this information.

Steps

1. Access the Terminate Employee task.
2. Complete the Reason section:

Option	Description
Primary Reason	Select from the termination reasons you defined on the Maintain Termination Categories task.
Secondary Reasons	Select from the termination reasons you defined on the Maintain Termination Categories task.
Local Termination Reasons	Select from the local termination reasons you defined on the Maintain Local Termination Reasons task. The field displays as optional or required based on the countries you configured on the Maintain Localization Settings task.

3. Complete the Notice Period section.

   This section only displays if you enabled notice periods for the employee's work location country.

Option	Description
Notification Date	Enter the date that the employee notified you of their resignation or the date you notified the employee of their termination. Populates when the employee's resignation initiates the termination. For Workday Payroll for France, you must enter the date the notice period starts because Workday uses this date for statutory payroll calculations and in regulatory reporting.
Notice Period Start Date	Available when you enable Notice Period Start Date for the employee's work location country. If you leave this field empty, the value populates from the Notification Date. You can't hide but only require this field on the Configure Optional Fields task.

Option	Description
Notice Period	If you enable Notice Period Start Date, this field displays the notice period in effect as of the Notice Period Start Date. If you don't enable Notice Period Start Date, this field displays the notice period in effect as of the Notification Date. This field is the employee's notice period if the termination reason is voluntary or if the employer's notice period is for involuntary termination reasons. If the employee doesn't have a notice period, displays 0 day(s).
Recommended Termination Date	If you enable Notice Period Start Date, this field is Notice Period Start Date plus the Notice Period. If you don't enable Notice Period Start Date, this field is Notification Date plus the Notice Period. If both Notice Period Start Date and Notice Period don't exist, it's the Notification Date.

4. Complete the Details section:

Option	Description
Termination Date	Select the effective date of the termination. Automatically populates from the Recommended Termination Date if one exists. The date must be after or same as the Notice Period Start Date. If the employee has a completed severance package, the termination date automatically populates from the date on the severance package. You can't change the date.
Last Day of Work	Automatically populates from the Termination Date, Recommended Termination Date, or the date on the severance package. If the severance package is complete, you can't change the date.
Pay Through Date	This date refers to severance pay that continues past the termination date. It automatically populates from the Termination Date, Recommended Termination Date, or the date on the severance package. If the severance package is complete, you can't change the date.
Resignation Date	Automatically populates when the employee's resignation initiates the termination.
Agreement Signature Date	Available when you enable Agreement Signature Date for the employee's work location country. The date must be before or same as the Termination Date.
Dismissal Process Start Date	Available when you enable Dismissal Process Start Date for the employee's work location country. The date must be before or same as the Termination Date.

5. Use the Regrettable section to specify whether the termination is a loss to the organization, regardless of the reason.

6. Use the Eligibility section to indicate whether the employee is available for rehire.

   Depending on your configuration, the Eligible for Rehire field can populate based on the termination reason you select.
7. Complete the Severance Details section.

   This section only displays if the employee has an assigned severance package with a start date after the hire date.
8. For positions in Canada only, complete the ROE Details section:

Option	Description
Last Date for Which Paid	Automatically populates from the Pay Through Date.
Expected Date of Return	The date must be equal to or greater than the Last Day of Work.
Not Returning	Unavailable if you entered the Expected Date of Return or selected Return Unknown.
Return Unknown	Unavailable if you entered the Expected Date of Return or selected Not Returning.

9. Complete the Position Details section:

Option	Description
Close Position	Select this check box to close the position in the employee's former organization. You can't close positions with an open job requisition. This field is only available in position organizations. With job management, you can't open or close individual jobs.
Is this position available for overlap?	Specify whether another worker can fill the position before the incumbent departs. Available for position management organizations when you enable job overlap on the Edit Tenant Setup - HCM task.

10. Add one or more attachments in the Attachments section.

Result

If you didn’t close the position, Workday sets its status to *Open*:

- If you use job requisitions, the position is available as soon as you have an open requisition.
- If you don’t use job requisitions, the position is available the next day.

If you use severance packages, Workday automatically creates and completes a severance compensation event in these cases:

- For a one-time payment.
- For post-termination severance payments that cause a change in the defined salary plan of an employee.

Next Steps

You can correct or reverse an employee termination. From the related actions menu of an employee, select Worker History > View Worker History. Then select either Correct or Rescind as a related action on the *Terminate* event.

When rescinding a termination, if the position has an open job requisition:

- With no candidate applications: Rescind the job requisition before rescinding the termination.

- With candidate applications: You can rescind the termination and preserve the posting and applications.

We recommend that you close the job requisition upon rescinding the termination.

When you terminate an employee, the employee can still access the tasks in My Tasks in the Save for Later status. To reassign or cancel business process steps automatically, Workday recommends that you configure the *Auto-Manage Business Processes* service step.

For best practice, we strongly recommend that you disable accounts for terminated employees once you view them as no longer required.

Related Information

Concepts

Concept: Updating Effective-Dated Custom Object Data

Tasks

Steps: Manage Notice Periods on page 683
Retire an Employee on page 971
Steps: Manage Employee Severance on page 1228
Deactivate Worker Payment Elections
Hide or Require Optional Fields
Discontinue Benefits on Termination on page 1361
Initiate Compensation Review Processes on page 1205
Initiate Termination in Mass Action Workbooks on page 707

Examples

Concept: Termination Dates for DSN Reporting (FRA)

Steps: Set Up End Jobs

Prerequisites

Set up the *Termination* business process.

Context

Set up the End Jobs task, enabling managers to end 1 or more jobs and terminate workers with multiple jobs.

Steps

1. Edit Domain Security Policies.

   Configure security for the *Staffing Actions: End Jobs* domain.

   On the *End Additional Job* business process security policy:

   - Update security permissions for the End Job initiating action.
   - Configure these new initiating actions:
     - End Job (initiates *End Additional Job* as a subprocess of *Termination*).
     - End Additional Job from End Jobs.

   On the *Termination* business process, configure security for the Termination from End Jobs initiating action.

   To terminate workers using the End Jobs task, users must have permission for both of these initiating actions:

   - End Additional Jobs from End Jobs
   - Termination from End Jobs

2. Edit Business Processes.

   Configure the *End Additional Job* business process as a subprocess of the *Termination* business process. Ensure that the *End Additional Job* subprocess step is:

   - After the *Review* step and before the *Completion* step.
   - Required and has no entry conditions. This configuration ensures that all jobs can end.

   You can add a *Termination Review* step to the *End Additional Job* business process. This review step ensures that all required fields have a value, such as fields that aren't part of the End Jobs task.

   Note: When you enable *End Additional Job* as a subprocess of *Termination*, Workday ends all jobs during all terminations and resignations. Resignations continue to route through Termination.

   Configure the *Switch Primary Job* business process as a subprocess of the *End Additional Job* business process. Ensure that the *Switch Primary Job* subprocess step is:

   - After the *Review* step and before the *Completion* step.
   - Required and has no entry conditions. This configuration ensures that the worker has a primary job.

   Note: When you add *Switch Primary Job* as a subprocess of *End Additional Job*, you can no longer correct *End Additional Job* events. Corrections might remove the worker's primary job.
3. Access the Maintain End Additional Job Categories task.

   Define categories and reasons for the *End Additional Job* task.

   Example: You create a *Voluntary* category with the *Other Employment* and *Unknown* reasons. You create an *Involuntary* category with the *Workforce Reduction* and *Job Reclassification* reasons.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
4. (Optional) Hide or Require Optional Fields.

   Access Configure Optional Fields task to control the display of optional fields on the Terminate Employee section. From the By Functional Area prompt, you can select *End Jobs* to access the fields. The fields display in the Additional Information for Terminate Employee section.
5. (Optional) Enable autocomplete on the *End Additional Job* and *Switch Primary Job* business process definitions.

   Enabling autocomplete on the *Switch Primary Job* business process definition also enables autocomplete when *Switch Primary Job* is a subprocess of these business process definitions:

   - *Add Additional Job*
   - *Change Job*

   To specify when you want to autocomplete, use rule-based business process configurations.

   When you enable autocomplete on the *End Additional Job* business process, *End Additional Job* events automatically complete only:

   - As a subprocess of *Termination*.
   - When initiated by the End Jobs task.

   See Set Up Security to Autocomplete Staffing Events on page 523.
6. (Optional) Access the Maintain Staffing Field Defaults task and configure these fields for *Switch Primary Job*:

   - Proposed Primary Job
   - Reason

   See Set Up Recruiting to Staffing Field Defaults on page 205.
7. (Optional) Enable the End Jobs task on the My Team Management dashboard so that managers can more easily access the task.

8. (Optional) Set up job overlap for vacating positions.

   Steps: Set Up Job Overlap on page 907.

Result

Managers can use the End Jobs task to end 1 or more jobs for a worker, or terminate a worker with 1 or more jobs.

Next Steps

To simplify access for managers, remove security for the existing End Job and Termination tasks. This security configuration ensures that users can only access the End Jobs task.

Related Information

Concepts

Concept: End Jobs on page 709

Tasks

Steps: Set Up Termination on page 697

Configure Rule-Based Business Processes

Hide or Require Optional Fields

Set Up Guided Tours

Reference

Troubleshooting: End Jobs Task Can't Terminate on page 721

Steps: Automate Initiation of Termination

Context

You can determine how you want to initiate the *Termination* business process for up to 500 fixed-term employees. The Mass Operation Management (MOM) task enables you to either:

- Automatically initiate the business process.
- Use a Mass Actions workbook to process fixed-term employees in bulk.

If you want to initiate the *Termination* business process automatically, Workday enables this initiation through a background job. Alternatively, you can review and verify the data before initiating termination by enabling the Mass Actions workbook. You don’t need to set up a Mass Actions workbook to initiate the business process automatically.

Steps

1. (Optional) Set up the Mass Actions workbook.

   See Steps: Set Up Mass Actions.
2. Edit Business Process Security Policies.

   Add appropriate security groups to the *Terminate from Launch Mass Action Event* initiating action.

   Ensure that these security groups are also on the *Mass Action Event* business process security policy.

   Configure the *Termination* business process security policy in the Staffing functional area.
3. Create a Segment-Based Security Group for Mass Operations.

   Create a segment-based security group with the *Initiation of Termination* segment.
4. Edit Domain Security Policies.

   Add your segment-based security group and grant View and Modify permissions.

   Security: *Mass Operation Management* domain in the System functional area.

5. Create Custom Reports.

   Create or edit an existing custom report. Ensure you use the:

   - Indexed All Workers report data source.
   - Worker report field on the Columns tab.
   - End Employment Date report field on the Filter tab.
6. Access the Mass Operation Management task.

   As you complete the task, consider:

Option	Description
Input Report	Select the custom report that you created.
Primary Reason	Select the primary reason for initiating the *Termination* business process for fixed-term employees.
Close Position	(Optional) Select this check box to close positions associated with fixed-term employees who are part of a position management organization.
Is this position available for overlap?	(Optional) Select this check box to set the fixed-term employee's position for overlap who is part of a position management organization.
Termination	If you select this check box, the Mass Operation Management task automatically initiates a *Termination* event for fixed-term employees in the custom report that: • Are active. • Don't have blocking transactions. • Have an end employment date. If you don't select the Termination check box, the Mass Operation Management task creates an entry in the Mass Actions workbook for fixed-term employees that: • Are active. • Have an end employment date. When the background job completes, you'll receive a notification. Access My Tasks and click the Open Workbook button to view your workbook. Click the Begin Error Validation button to ensure that there are no errors. After verifying, submit the Mass Actions workbook to initiate the *Termination* business process in bulk for all valid fixed-term employees.

7. (Optional) Access the Scheduled Future Processes report.

   Use this report to change the run frequency or schedule. If you need to change any other Mass Operation Configuration parameters, you must delete it and create a new one.

Next Steps

View the status of the background job for the *Termination* events using the Mass Operation Management Runs report.

You can also manually initiate the *Termination* business process in bulk using workbooks for employees.

Related Information

Reference

2020R2 What's New Post: Mass Actions in Workbooks for Termination and End Contingent Worker Contract

Steps: Set Up Mass Action Workbooks to Initiate Termination

Prerequisites

Configure the *Termination* business process and business process security policy.

Context

You can set up a Mass Action workbook to initiate the *Termination* business process manually in bulk for employees.

Steps

1. Set up Mass Action workbooks.

   See Steps: Set Up Mass Actions.
2. Edit Business Process Security Policies.

   Configure security permissions for the *Terminate from Launch Mass Action Event* initiating action on the *Termination* business process.

   Ensure that these security groups are also on the *Mass Action Event* business process security policy.
3. (Optional) Add additional facets to the Launch Mass Termination report. To add additional facets, copy the delivered Launch Mass Termination report to a custom report and add any additional filters in the report definition.
4. (Optional) Create Custom Reports.

   Create or edit a custom report to use in the Launch Mass Action Event task to identify active employees to populate in the workbook.

   Workday won't generate a workbook if the selected report includes more than 500 employees. You can set up filter options on a custom report to filter the employees you want to include.
5. (Optional) Create or edit a search report to use to access the Launch Mass Action Event task.

   Ensure that you select *Launch Mass Action Event* from the Mass Action column on the Advanced tab of the search report.

   See Steps: Create Search Reports.

Next Steps

Access the Launch Mass Action Event task to initiate the *Termination* business process manually in a workbook.

Related Information

Concepts

Setup Considerations: Org Studio and Mass Actions

Tasks

Steps: Set Up Termination on page 697

Set Up Filter Options for Custom Reports

Reference

2020R2 What's New Post: Mass Actions in Workbooks for Termination and End Contingent Worker Contract

Initiate Termination in Mass Action Workbooks

Prerequisites

- Configure the *Termination* business process and business process security policy.
- Set up mass action workbooks for terminations.
- End additional jobs or positions for the relevant employees.
- Security: *Mass Action Events* domain in the System functional area.

Context

You can initiate the *Termination* business process for employees in bulk with a Mass Actions workbook.

You can add employees to a workbook by:

- Using the Launch Mass Termination report.
- Selecting a report in the Launch Mass Action Event task.
- Using a search report to access the Launch Mass Action Event task.
- Adding them manually.

The Mass Operation Management (MOM) task also enables you to use a Mass Actions workbook to process fixed-term employees in bulk.

Workday recommends that HR administrators complete fields in the workbook from left to right so data can populate efficiently.

Steps

1. Access the Launch Mass Action Event task.
2. As you complete the task, consider:

Option	Description
Mass Action	Select *Termination*.
Report	To populate the workbook, select a standard report or a custom report that includes up to 500 employees. You can filter the population by report definition parameters, if you select a custom report with configured parameters.

3. After the workbook generates, select Open Workbook.
4. As you complete the workbook, consider:

Field	Description
Share	You can share the workbook with other individuals or security groups. Members can't edit the workbook if they're only granted access to the *Complete Mass Action Event* step on the *Mass Action Event* business process policy. You can share mass action worksheets with constraint security groups but view and edit access to mass action worksheets depends on the position and domain security settings that you apply to the profiles.

Field	Description
Employee	If you select a report on the Launch Mass Action Event task, the number of employees in the workbook can differ from the report. Workday automatically removes inactive employees, future employees, and contingent workers from the workbook.
Notification Date	This field can populate the Notice Period field based on the Primary Reason you select if the employee doesn't have a severance package.
Recommended Termination Date	This field can populate based on the Notice Period and Notification Date fields.
Termination Date Last Day of Work Pay Through Date	These fields populate if you select a Termination Date on the Launch Mass Action Event task or in the workbook. Employees can have different termination dates in the same workbook.
Assigned Severance Package	This read-only field populates if the employee has an assigned severance package.
Begin Error Validation	Select this button to resolve any errors and submit the workbook.

Result

The *Termination* business process initiates for employees in the workbook. Any other steps on the business process route for completion.

Related Information
Tasks

Steps: Set Up Mass Actions

Steps: Set Up Mass Action Workbooks to Initiate Termination on page 706

Reference

2020R2 What's New Post: Mass Actions in Workbooks for Termination and End Contingent Worker Contract

2020R2 What's New Post: Automate Initiation of Termination

Hire and Terminate Concepts

Concept: Hire Employee Initiating Actions

The *Hire* business process offers multiple Hire Employee initiating actions to suit the needs of your organization. When configuring the business process, you can decide which initiating actions are most appropriate for your security groups. For more information on initiating actions, see Concept: Action Stepand Setup Considerations: Business Processes. Workday recommends that your users have access to only 1 version of the Hire Employee task from Workday global search. The main differences between the Hire Employee initiating actions are the ability to:

- Use additional search fields and view staffing information in search results.
- Create pre-hires.
- Hire directly from an employment agreement.

If your organization prioritizes preventing creation of duplicate person records, Workday recommends using 1 of the initiating actions with additional search capabilities. These versions of the Hire Employee task make it easier for you to find existing person records. In addition to the pre-hires and former workers, your search results include:

- Pre-hires marked ineligible for hire.
- Active students with a pre-hire record.
- Inactive students and inactive external students without a pre-hire record.
- Terminated workers marked ineligible for rehire.

Note: We filter out active workers who don't have a termination date and limit the results to 100.

If you want to use an enhanced Pre-Hire Search experience, you can change the Hire Employee initiating action by updating the business process policy to provide access to either of these options:

- Hire Employee Description: Search for Pre-Hires, former workers, inactive students, or inactive external students and hire them into an open position. Also enables hiring from the related actions menu of a job requisition, supervisory organization, or an unfilled position.
- Hire Employee Description: Search for existing Pre-Hires, former workers, inactive students, inactive external students, or create a new Pre-Hire and hire them into an open position. Also enables hiring from the related actions menu of a job requisition, supervisory organization, or an unfilled position.

Related Information
Reference

2024R2 Feature Release Note: Enhanced Pre-Hire Search

2020R1 What's New Post: Prevent Duplicate Records During Hiring and Contracting

Concept: End Jobs

The End Jobs task enables users to:

- End 1 job for a worker.
- End multiple jobs for a worker.
- Terminate a worker with 1 or more jobs.

End Jobs Grid

The End Jobs task grid displays jobs as of the worker's latest staffing event, including events or changes that are effective on a future date. When you schedule a job to end on a future date, that job doesn't display in the grid. Example: A job is active today, January 1, but has an *End Additional Job* event effective on February 1. The job doesn't display in the End Jobs task today because the future-dated *End Additional Job* event is the latest event for that job.

When a worker has a future *Add Additional Job* event, you can't end that job or terminate the worker from the End Jobs task. To terminate the worker, you must first cancel or rescind the future *Add Additional Job* event.

The End Jobs task only displays jobs that you have permission to see. The task also respects localization settings for additional job classifications.

Subprocesses

The End Date for the End Jobs task automatically populates into the initiation of both subsequent *Termination* and *End Additional Job* subprocesses. Example: You select an End Date of January 31 on the End Jobs task. January 31 automatically populates in both the *Termination* and *End Additional Job* events. When you change the End Date to February 15 on the *Termination* event, the *End Additional Job* event still automatically populates an End Date of January 31.

Related Information
Tasks

Steps: Set Up End Jobs on page 702

Reference

2021R1 What's New Post: End Jobs and Terminate Workers

Concept: Worker Data Streams

Organizations with complex structures that function like separate entities can use worker data streams to report on information across their businesses while maintaining separation at the business entity level. When moving regular or contingent workers between subsidiary structures, you can terminate them and rehire or recontract them in the new organization, rather than transferring them directly. Through this process, Workday enables you to preserve workers' work-related information while keeping it hidden from the worker and the new organization.

When you rehire or recontract a worker, use the *Assign Worker Record* step on the *Hire Employee* and *Contract Contingent Worker* business processes to either select an existing worker record or create a new one. Prehires can only have 1 active worker record at a time. To see if workers have more than 1 active worker record, access the Worker Data Streams Audit report.

To configure the *Assign Worker Record* step, Workday recommends you work with Workday Professional Services or a Workday Consulting Partner. Once configured, the *Assign Worker Record* step displays whenever you rehire or recontract a worker without changing their worker type (employee or contingent worker). If you change a worker's worker type during the termination and rehiring or recontracting process, Workday automatically generates a new worker record.

New worker records include all previous personal information but exclude all work-related information, such as:

- Absence calendar.
- Benefits.
- Custom objects.
- Employee calendar.
- I-9 data.
- Job data.
- Performance reviews.
- Time tracking.
- Time entry.

Concept: Termination Impact

Employee terminations have a broad impact in Workday. It affects areas such as staffing, compensation, benefits, security, reports, and integrations.

Note: The *Termination* business process definition for your organization might include some of these actions by default.

General	• Complete the Termination business process. • Document the results of an exit interview with the Create Exit Interview task. The *Termination* business process doesn't support this task as an allowed action. You can configure it as a To Do step. • Deactivate the employee's Workday account. You can also automate this process. • Grant access to payslips, tax documents, and contact information in Workday. • Change the employee's security groups. To see the current security group assignments, select from Security Profile > View Security Groups the employee's related actions menu.

	• Reassign roles held by the terminated employee to prevent tasks from becoming unassigned. • Enter the date of death on the Edit Personal Information task if a termination is involuntary because of death.

Tasks, Reports, and Integrations	• Reassign My Task items, business processes, and delegations. Configure the *Auto-Manage Business Processes* service step on business processes to reassign or cancel business process steps that are in Save for Later status automatically.
	• Transfer ownership of custom reports to another worker. From the employee's related actions menu, select Security Profile > View Custom Reports. Access the Transfer Ownership of Custom Reports task. The intended new owner must be in:
	    • The Report Writer security group.
	    • One or more security groups that are associated with the data source accessed in the report.
	• Transfer ownership of background processes to another worker.

Financial	• Reassign business assets. • Submit a final expense report for the terminated employee.
Benefits and Compensation	• Discontinue Benefits on Termination on page 1361. • Review COBRA eligibility. • Request One-Time Payments for Employees on page 1129. • Initiate Compensation Review Processes on page 1205. • Concept: Pay for Terminated Workers and set up payroll input. • Steps: Add or Remove Employees to or from Compensation Reviews on page 1208.
Staffing and Talent	• Review and update service dates. • Review union membership. • Assign retiree status. • Steps: Set Up Talent Data Removal for Terminated Workers on page 1813. • Cancel or complete in-progress employee reviews. You can also manually advance a review to the completion step. • Steps: Set Up Auto-Manage Business Processes Service Step to take action on business processes and tasks in My Tasks for a person automatically.

- End any active collective agreement assignments without an end date.

Related Information

Tasks

Initiate Compensation Review Processes on page 1205

Steps: Manage Collective Agreements on page 647

Reference

FAQ: Terminations on page 715

Concept: Rehire Eligibility

While completing a termination, Workday includes the Eligible for Rehire prompt on the *Termination* business process and the Exit Interview tasks. Workday also includes this prompt on the *No Show* business process. You can use the Configure Optional Fields and the Maintain Localization Settings tasks to hide or require the prompt.

You can configure a default value for the Eligible for Rehire field based on the termination reason using the Maintain Termination Categories task. Workday populates the default value after you select a termination reason on the *Termination* business process.

Your selection during the *Termination* or *No Show* business processes or Exit Interview tasks automatically updates the field on a pre-hire's profile. If you make conflicting Yes and No selections between the business process and the tasks, then the value on the pre-hire's profile is No. If you make Yes and blank selections, then the value on the pre-hire's profile is Yes.

Note: You can use the Change Hire Eligibility Status task on a worker's pre-hire profile. However, doing so doesn't automatically populate the Eligible for Rehire prompts on the *Termination* or *No Show* business processes or Exit Interview tasks.

Related Information

Tasks

Terminate Employees on page 699

Reference: No Shows and Terminations Comparisons

The *No Show* and *Termination* business processes provide different levels of control when a worker has not shown up for the first day of work. Use the *Termination* business process when you've run payroll for a worker. Otherwise, you can compare the 2 business processes.

	No Shows	Hire Rescind	Terminations
Runs a payroll event against the worker?	No	No	Yes
Usable when you've paid the worker?	No	No	Yes
Usable when the worker has benefit events?	No	No	Yes
Unhires the employee and rescinds the hire event so that the worker goes back to being a pre-hire?	Yes	Yes	No

	No Shows	Hire Rescind	Terminations
Displays workers in your headcount and attrition rate reports?	No	No	Yes
Reports on workers who don't arrive on their first day of work?	Yes	No	Yes, if you create a reason for the termination to mark them as not showing up. This reason doesn't display on the pre-hire record for the worker.
Marks the worker as a *No Show* on their pre-hire record, and when you go to rehire the worker?	Yes	No	No

FAQ: Hire Employee Redesign and Consolidation Experience

Is the new ***Hire*** experience automatically available?	Yes, this feature is automatically available for Production environments.
Can I hide the banner display on the Hire Employee task?	If you've enabled the branding banner on your homepage, it automatically displays on the Hire Details page of the Hire Employee task. We're working on an enhancement that enables you to display or hide the banner on the task.
Can anyone in my organization set up the consolidated ***Hire*** experience?	Yes but if you experience difficulty setting up this feature and its security, we recommend that you work with a Workday-certified implementer or contact your named Support contact to engage Professional Services. During setup on the *Hire* business process type, ensure that you select the relevant initiating actions for your organization and update the security groups accordingly.
How do I access the Configure Business Process Consolidated Template task?	Some organizations restrict access to this task. If you experience difficulty accessing the task to set up this feature and its security, we recommend that you work with a Workday-certified implementer or contact your named Support contact to engage Professional Services. Follow these steps to check your access to the task: 1. Run the Business Process Configuration Options report. 2. Search for the *Hire* business process in the prompt. 3. From the related actions, select Business Process > Configure Consolidated Template. You must also have access to these domains in the System functional area: • *Business Process Administration*

- *Manage: Business Process Definitions*

Can I change the sub business process order in the Configure Business Process Consolidated Template task?

The order in which the sub business processes appear in the task is predefined by Workday and can't be changed by the user in the consolidated template or in the business process definition.

How can I best manage sub business processes in the Configure Business Process Consolidated Template task?

Ensure that the sub business processes in your consolidated template match the sub business processes that are in your *Hire* business process definition.

Example: If you select *Government IDs* and *Service Dates* as the only values for Sub Business Processes for your consolidated template, then you must include *Government IDs* and *Service Dates* in your *Hire* business process definition. Contact Support if this doesn't solve the issue.

How can I make the sub business processes display in the consolidated template?

Grant users *View* and *Modify* access to the relevant sub business process domains:

Sub Business Process	Domain
Assign Pay Group	*Worker Data: Payroll* (Pay Group Specific) Alternative: *Worker Data: Payroll Interface* (Pay Group Specific)
Collective Agreement	*Worker Data: Collective Agreements*
Government IDs	*Person Data: Government IDs*
Organization Assignments	*Staffing Organizations: Header*
Payment Elections	*Worker Data: Payroll* (Payment Elections) Alternatives: • *Manage: Payment Election* • *Worker Data: Payroll Interface* (Pay Group Specific)
Propose Compensation Hire	*Set Up: Compensation Change Templates*
Service Dates	*Worker Data: Service Dates*

FAQ: How do I import worker IDs during a hire?

To import third-party worker IDs as part of a *Hire* event, configure these steps:

- *Verify Proposed Contingent Worker ID* step on the *Contract Contingent Worker* business process.
- *Verify Proposed Employee ID* step on the *Hire* business process.

These steps enable you to pull in a worker ID from the *Put Hire Event Proposed Worker ID* web service.

Related Information

Tasks

Hire Employees on page 690

FAQ: Terminations

- What is the difference between terminating an employee and ending a contingent worker's contract?
- What time of day does a termination take effect?
- How do I handle organization assignments for terminated workers?
- How can I prevent a terminated worker from accessing and submitting certain tasks in My Tasks?
- How do I enable terminated workers to access their personal, compensation, and benefits information in Workday?
- How do I grant bonuses to terminated employees?
- Which domains provide access to terminated workers?
- How can I view terminated workers in active organizations?
- Which data sources return terminated workers?
- Why do reports display different addresses for terminated workers?
- Which email address does Workday use for terminated workers?
- What if a performance review is in progress for a terminated worker?
- Can terminated employees receive payments through Workday Payroll?
- Can a nonpayroll administrator end ongoing payroll inputs for terminated workers? on page 719
- Can a nonpayroll administrator terminate a worker and pay them on the day you terminate them or any other day? on page 719
- What if the employee has an active collective agreement assigned? on page 719

What is the difference between terminating an employee and ending a contingent worker's contract?	The *Termination* and *End Contingent Worker Contract* business processes are similar, except for the steps related to benefits and compensation. The *Termination* business process can include: • *Change Benefit Elections* • *Create Change Benefits Event* • *Edit Service Dates* • *Request One-Time Payment* • *Review COBRA Eligibility* The *End Contingent Worker Contract* business process only allows a *Create Change Order from Contract Contingent Worker* step. You can customize these 2 business processes to meet the needs of different organizations.
What time of day does a termination take effect?	Terminations are effective at the end of the termination date, based on the time zone of the position location.
How do I handle organization assignments for terminated workers?	You have several options:

	• Keep terminated workers in their current, active organizations.
	  ◦ Pros: Role assignments and inheritance don't change.
	  ◦ Cons: Staffing reports include the terminated workers.
	• Move terminated workers into a separate organization specifically for terminated workers.
	  ◦ Pros: Role assignments require less maintenance and inheritance is available. However, if you inactivate the organization later, role inheritance remains available if you keep the organization in the hierarchy.
	  ◦ Cons: You can't restrict access to specific terminated workers. Anyone who has permission to access the organization can access all of the terminated workers. Also, the organization is available for selection in prompts even though it's not a valid choice.
	• Inactivate the organizations that terminated workers belong to. Inactive organizations remain in their respective hierarchies and inherited roles remain in the inactive organization. This behavior applies unless you explicitly select the Remove from Hierarchy option when inactivating an organization. The best way to ensure that you continue to have visibility into inactive organizations and to maintain role inheritance within them is to accept the default behavior (to keep inactive organizations within their associated hierarchies).

How can I prevent a terminated worker from accessing and submitting certain tasks in My Tasks?	For *Action* and non-*Action* step types, Workday recommends that you reassign tasks when the worker is no longer in their role. You can reassign their tasks by using the: • *Auto-Manage Business Processes* service step. • Manage Business Processes for Worker task. For *Action* steps only, Workday displays Action no longer available when accessing the step in My Tasks. The worker might still be able to take action on other step types even though they no longer have the security permissions. Example: *To Do* steps.
How do I enable terminated workers to access their personal, compensation, and benefits information in Workday?	Assign the terminated workers to the *Terminee as Self* security group and add this group to the domains that control access to the tasks:

	• *Landing Page - Home* • *Self-Service: Contact Information* • *Self-Service: Device Tokens* • *Self-Service: Add Worker Documents* • *Self-Service: Edit and Delete Worker Documents* • *Self-Service: Emergency Contacts* • *Self-Service: Government IDs* • *Self-Service: Home Contact Information* • *Self-Service: ID Information* • *Self-Service: Legal Name* • *Self-Service: Licenses* • *Self-Service: Name* • *Self-Service: Other IDs* • *Self-Service: Passports and Visas* • *Self-Service: Payroll (My Payslips)* • *Self-Service: Payroll (My Tax Documents) - USA* • *Self-Service: Personal Data* • *Self-Service: Personal Information* • *Self-Service: Work Contact Information* The primary domains are: • *Self-Service: Benefits* or *Self Service: Benefits and Pay Hub* to access benefits information. • *Self-Service: Compensation* to access compensation information. • *Self-Service: Personal Information* to access personal information.
How do I grant bonuses to terminated employees?	You can select the Include Employees Terminated During Process Period check box on the Initiate Compensation Review Process task. Workday includes terminated employees subject to the rules configured on the bonus plan.
Which domains provide access to terminated workers?	You must be in a security group that has permission on the *Worker Data: Public Worker Reports* domain, which enables you to search for employees, and have permission on at least one of these additional domains: • *Person Data: Birth Place* • *Person Data: Emergency Contacts* • *Person Data: Gender* • *Person Data: Home Contact Information* • *Person Data: ID Information* • *Person Data: Military Status* • *Person Data: Personal Information* • *Self-Service: Benefit Elections* • *Self-Service: Business Assets* • *Self-Service: Compensation* • *Self-Service: Credit Card* • *Self-Service: Current Staffing Information* • *Self-Service: Emergency Contacts*

	• *Self-Service: Home Contact Information* • *Self-Service: ID Information* • *Self-Service: Personal Information* • *Self-Service: Time Off* • *Worker Data: Benefit Elections* • *Worker Data: Business Assets* • *Worker Data: Compensation by Organization* • *Worker Data: Credit Card* • *Worker Data: Current Staffing Information* • *Worker Data: Leave of Absence* • *Worker Data: Time Off (Time Off Balances)*
How can I view terminated workers in active organizations?	Inactive organizations automatically remain in any of their respective hierarchies and they maintain any inherited roles in the inactive organization. This behavior applies unless you explicitly select the Remove from Hierarchy option when inactivating an organization. The best way to maintain visibility and role inheritance in inactive organizations is to accept the default behavior, keeping them within their associated hierarchies. If you select the Remove from Hierarchy option, then you must have a role in the inactive organization. You can assign all inherited roles directly when you inactivate an organization by selecting the Keep All Role Assignments check box. If an organization isn't part of a hierarchy, you can assign a superior to add it back to a hierarchy so that role inheritance is available.
Which data sources return terminated workers?	Some of the most common data sources returning terminated workers include: • All Active and Terminated Workers • All Contingent Workers • All Terminated Employees • All Workers • Terminations The All Active and Terminated Workers, All Workers, and Terminations data sources return both employees and contingent workers. A key difference between these data sources is how they handle effective-dated information. In reports that don't have an effective date: • The All Active and Terminated Workers data source returns data for terminated workers as of their last day of work. Use this data source to report on effective-dated position and compensation data. • The All Workers and All Contingent Workers data sources include rows for terminated workers, but return blank fields for effective-dated information. Use these data sources to

	report on other information that isn't effective-dated, such as personal information. Refer to the data source descriptions in Workday for additional information. The descriptions specify if the data sources return terminated workers.
Why do reports display different addresses for terminated workers?	The address depends on the report data source that you use: • Reports using the All Active and Terminated Workers data source return the address that was effective as of the worker's termination date. • Reports using the All Workers data source return the terminated worker's address as of the report date.
Which email address does Workday use for terminated workers?	Once the termination process is complete, Workday sends email messages to the worker's primary home email address. If there's no primary home email for the terminated worker, Workday will use these emails for the worker in this order: • Work. • Home. • Business.
What if a performance review is in progress for a terminated worker?	Cancel the performance review: 1. As a related action on the worker, select Talent > View Employee Reviews. 2. Locate the review in the In Progress table, then select Business Process > Cancel from the related actions menu.
Can terminated employees receive payments through Workday Payroll?	Yes, if you configure the run category associated with the employee's pay group to process terminated employees who either: • Are on salary continuance. • Have payroll input. • Have a one-time payment or a bonus payment from Workday Compensation.
Can a nonpayroll administrator end ongoing payroll inputs for terminated workers?	Yes. Configure the *End Payroll Inputs* business process on the *Termination* business process.
Can a nonpayroll administrator terminate a worker and pay them on the day you terminate them or any other day?	Yes. Configure the *On Demand Event* business process on the *Termination* business process.
What if the employee has an active collective agreement assigned?	You can configure the End Collective Agreement Assignment step on the *Termination* business process. Doing so ends any active collective agreement assignments without an end date during the termination.

Related Information

Concepts

Concept: Pay for Terminated Workers

Concept: Termination Impact on page 710

Tasks

Terminate Employees on page 699

End Contingent Worker Contracts on page 730

Initiate Compensation Review Processes on page 1205

Steps: Set Up Decentralized Processing for On-Demand Payments

Steps: Set Up End Payroll Inputs for Terminated Workers

Reference

2021R1 What's New Post: End Ongoing Payroll Inputs for Terminated Workers

Troubleshooting: Configure Business Process Consolidated Template

Users can't access the Configure Business Process Consolidated Template task.

Cause: They don't have security access to the task's domains.

Solution: Some organizations restrict access to the Configure Business Process Consolidated Template task. If you experience difficulty accessing the task to set up this feature and its security, we recommend that you work with a Workday-certified implementer or contact your named Support contact to engage Professional Services.

Users can't find the Configure Business Process Consolidated Template task.

Cause: The task doesn't display in global Search.

Solution: Security: These domains in the System functional area:

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

Steps

1. Access the View the Business Process Type report.
2. Search for the *Hire* business process in the prompt.
3. From the related actions, select Business Process > Configure Consolidated Template.

Users can't view the Configure Business Process Consolidated Template task.

Cause: The task doesn't display in global Search.

Solution: Security: These domains in the System functional area:

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

Steps

1. Search for the *Hire* business process.
2. From the related actions, select Business Process Policy > View.
3. From the Business Process Policy related actions, select Business Process > Configure Consolidated Template.

Users don't receive a consolidated experience for Review or Approve.

Cause: Review or Approve is not set to Step (b) on the *Hire* business process definition, or the reviewer or approver doesn't have the necessary security domain access to the sub business processes.

Solution: Security: These domains in the System functional area:

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

Steps

1. From the *Hire* business process related actions, select Business Process > Edit Definition.
2. Set Review or Approve to Step (b) on your *Hire* business process.
3. Ensure that the reviewer or approver has access to the sub business process domains.

The sub business processes don't display in the consolidated template.

Cause: Users don't have *View* and *Modify* access to the relevant sub business process domains.

Solution: Grant users *View* and *Modify* access to the relevant sub business process domains:

Sub Business Process	Domain
Assign Pay Group	*Worker Data: Payroll* (Pay Group Specific) Alternative: *Worker Data: Payroll Interface* (Pay Group Specific)
Collective Agreement	*Worker Data: Collective Agreements*
Government IDs	*Person Data: Government IDs*
Organization Assignments	*Staffing Organizations: Header*
Payment Elections	*Worker Data: Payroll* (Payment Elections) Alternatives: • *Manage: Payment Election* • *Worker Data: Payroll Interface* (Pay Group Specific)
Propose Compensation Hire	*Set Up: Compensation Change Templates*
Service Dates	*Worker Data: Service Dates*

Troubleshooting: End Jobs Task Can't Terminate

When you attempt to end all jobs and terminate a worker, Workday returns a message indicating that your organization doesn't enable you to end all jobs at once. Contact your system administrator or end each job individually.

Cause: The *End Additional Job* business process isn't correctly configured as a subprocess of the *Termination* business process.

Solution: Ensure that *End Additional Job* is correctly configured as a step on the *Termination* business process definition.

Steps

Security: *Business Process Administration* and *Manage: Business Process Definitions* domains in the System functional area.

1. Access the *Termination* business process definition.

2. Configure the *End Additional Job* business process as an Action step.

   The *End Additional Job* subprocess step must be:

   - After the *Review* step and before the *Completion* step.
   - Required and have no entry conditions. This configuration ensures that the task can end all jobs.

Related Information
Tasks
Steps: Set Up End Jobs on page 702

Contingent Worker Staffing

Steps: Set Up Contingent Workers

Context

Complete the necessary configuration steps before hiring contingent workers to simplify the hiring workflow and set up the proper defaulting of fields.

Steps

1. Create hiring restrictions or positions.

   See Create Hiring Restrictions on page 591 or Create Positions on page 595.
2. Access the Edit Tenant Setup - HCM task.

   Select an ID definition, configure job requisitions, and optionally allow overrides of hiring restrictions.

   See Reference: Edit Tenant Setup - HCM.
3. Access the Maintain Event Categories and Reasons task.

   Create categories and reasons for hiring contingent workers.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
4. Create Contingent Worker Types on page 532.

   Select the Require Cost Information on Job Requisition check box to copy information from job requisitions to contracts and purchase orders automatically.
5. Access the Edit Government IDs task.

   Specify a government ID for the contingent worker.

   Security: *Edit Government IDs* domain in the Personal Data functional area.

   To restrict access to a government ID, use the *Person Data: Add Government IDs* domain. This domain provides access to enter a person's national and government IDs in the *Edit Government IDs* and *Edit IDs* subprocesses of the *Hire* and *Contract Contingent Worker* business processes. Users with access to this domain can't view or modify the IDs after they complete the subprocess.

   Security: *Person Data: Add Government IDs* domain in the Personal Data functional area.
6. ../../../authentication-and-security/configurable-security/security-policies/dan1370797389950.dita.

   Set up the security policies for the *Pre-Hire Data: Contact Information* domain in the Pre-Hire Process functional area.
7. (Optional) Hide or Require Optional Fields.

   Hide or require optional fields on the *Contract Contingent Worker* business process.

Next Steps

Contract and manage contingent workers for your organization.

Related Information

Concepts

Setup Considerations: Autocomplete Staffing Events on page 519

Tasks

Steps: Set Up Workday IDs on page 66
Steps: Set Up Identification Documents on page 67
Steps: Set Up Mass Action Workbooks to Initiate End Contingent Worker Contract on page 733
Steps: Automate Initiation of Ending Contingent Worker Contracts on page 731

Contract Contingent Workers

Prerequisites

- Configure the *Contract Contingent Worker* business process and security policy in the Staffing functional area. If you want to track additional data for contingent workers, add custom fields to the business process.
- If you use job requisitions, confirm that you have an open and approved job requisition.

Context

Hire contingent workers into open positions and optionally create purchase orders.

Steps

1. Access the Contract Contingent Worker task.
2. Complete the contract information.

   Workday populates many of the Job Details fields automatically with values defined on the position or job requisition. If you use job requisitions, you can't change those values. Rather, update the job requisition itself.

Option	Description
Contract Start Date	The Contract Start Date must be equal to or greater than: • The Recruiting Start Date on the requisition if you use job requisitions. • The Earliest Hire Date on the position if you don't use job requisitions.
Reason	Only the reasons for the *Contract Contingent Worker* event are available.
Position	Select the position. Workday doesn't display this field for organizations that use job management as the staffing model. • If you use job requisitions, Workday lists positions with an open, approved job requisition, and a Recruiting Start Date that's on or after the current date. • If you don't use job requisitions, Workday lists positions or jobs with an Availability Date that's on or after the current date.

Option	Description
Job Requisition	Available for job management and position management organizations based on tenant settings. Job Management: Available if Enable Job Requisitions for Job Management is selected. Position Management: • Required if Require Job Requisitions for All Position Management staffing events is selected. • Available if Enable Job Requisitions for Position Management based on rules is selected. Exit conditions defined on the *Contract Contingent Worker* business process determine whether a job requisition is required. Example: You can add an exit condition that requires job requisitions for all hiring in Canada, but not elsewhere.
Contingent Worker Type	Select from the types you defined in the Maintain Contingent Worker Types task.
Job Profile	Select from the profiles you specified in the Create Position or Set Hiring Restrictions task, unless your tenant allows overrides.
Time Type	Select from the types you specified in the Create Position or Set Hiring Restrictions task, unless your tenant allows overrides. Automatically populates the value defined on the job profile.
Location	Select from the locations you specified in the Create Position or Set Hiring Restrictions task, or from the primary or additional locations on the job requisition.
Work Space	Select from the work spaces (such as building, floor, or cubicle) associated with the Location.

3. If you capture cost information on contingent worker job requisitions, Workday automatically transfers the cost details to the Contract Details section. You can override these values.

Option	Description
Create Purchase Order	Available if you configured this business process to add the *Create Purchase Order From Contract Contingent Worker* action after the completion step. Select this check box if you want Workday to create the purchase order automatically from the Contract Details information.

Option	Description
	Note: Purchase orders created from this business process aren't available for approval in supplier collaboration.
Supplier	Select if this worker is contracting through a Supplier. When you select a supplier, Workday clears the Independent Contingent Worker check box. Workday displays fully defined suppliers and basic supplier worktags. However, if you previously set up Procurement and the subprocess to create purchase orders, then only fully defined suppliers display.
Default Payment Terms	If you didn't specify a supplier, select the payment terms.
Contract End Date	Required if you created a purchase order.
Contract Pay Rate	Required if you created a purchase order.
Currency	Select the currency associated with the pay rate.
Frequency	Select Hourly if you adjusted this task to create a purchase order.
Contract Amount	Specify the contract amount.
Assignment Details	Enter contract details, such as the tax ID type or extension parameters.

4. Complete the Working Time section.

   Workday initially populates many of these fields with values from the position or job requisition. As you complete the task, Workday updates the values.

Option	Description
Scheduled Weekly Hours	Populates from a rule when: • You've defined a working time rule. • The data populated on the task applies the rule. Populates from the Default Weekly Hours if there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position.
Location Weekly Hours	Displays the standard weekly hours associated with the Location.
Default Weekly Hours	Populates from a rule when:

Option	Description
	• You've defined a working time rule. • The data populated on the task applies the rule. Populates from the Location Weekly Hours field if there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position.
FTE	Calculated by dividing the Scheduled Weekly Hours by the Default Weekly Hours. This value displays as a percentage.
Specify a Paid FTE	Select the check box to specify paid full-time equivalent for a worker. Available when you enable Paid FTE on the Maintain Localization Settings task.
Paid FTE %	You can enter a percentage that overrides the FTE field for use in your Workday Compensation and Workday Payroll calculations. Available when you enable Paid FTE on the Maintain Localization Settings task.
Specify a Working FTE	Select the check box to specify working full-time equivalent for a worker. Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Working FTE %	Enter a working full-time equivalent percentage. Used in custom reporting. Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Work Shift	Available when you enable Work Shift on the Maintain Localization Settings task. Available when you selecte the Work Shift Required check box on the job profile. Define the work shifts for a location using the Maintain Work Shifts task.
Frequency	Select from the working time frequencies you specified on the Maintain Frequencies task.

Option	Description
	Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Unit	Select from the preconfigured options of hours or days. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Value	Enter the duration of the working time in selected units. Automatically populates to zero. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.

5. Add any Additional Information.

Option	Description
Job Title	Automatically populates from the Job Profile.
Business Title	Automatically populates from the Job Title. You can control the display of business titles by enabling the *Worker Data: Business Title on Worker Profile* domain security policy in the Staffing functional area.
Job Category	Automatically populates from the Job Profile.
Job Classifications	Automatically populates from the Job Profile.
Additional Job Classifications	Select classifications as needed.
Company Insider Types	Select from the types associated with the Job Profile. Define company insider types with the Maintain Company Insider Types task. Assign them to a job profile with the Edit Job Profile task.
First Day of Work	Automatically populates from the Contract Start Date.
Conversion Position Start Date	Available if you imported the worker data.

Result

- Workday sets the status of the position and job requisition, if applicable, to *Filled*.
- Workday assigns the *Contingent Worker as Self* and *All Contingent Workers* security groups to the worker. If the Contract Start Date is in the future, the worker is placed into the *Pre-Contingent Worker as Self* security group until the start date.

Next Steps

- You can correct or reverse a contingent worker's contract. From the contingent worker's related actions menu, select Worker History > View Worker History. Then select either Correct or Rescind as a related action on the *Contract* event:
  - You can make corrections only if you didn't create a purchase order when you first contracted this worker.
  - If the position had a job requisition, it reopens when you rescind the event.
- Assign National IDs and Government IDs for independent contingent workers with the Edit Government IDs task.
- Select the Tax Authority Form Type for independent contingent workers with the Assign Tax Authority Form Type to Contingent Worker task.

Related Information

Concepts

Concept: Contingent Worker Purchase Orders on page 741
Concept: Updating Effective-Dated Custom Object Data
Concept: Rehire Former Workers on page 117
Concept: Worker Data Streams on page 710
Concept: Contract Contingent Worker Initiating Actions on page 742
Concept: Workday Docs

Tasks

Assign a Tax Authority Form Type to Contingent Workers
Create Contingent Worker Types on page 532
Steps: Set Up Worker Onboarding on page 746
Steps: Request and Contract Contingent Workers
Steps: Set Up Workday Docs

Steps: Contract Inactive and Inactive External Students

Prerequisites

- Create jobs or positions.
- Manage inactive student or inactive external student records.

Context

Workday enables you to contract these worker types using the Contract Contingent Worker task, enabling you to take advantage of their workforce potential:

- Inactive external students.
- Inactive students.

Steps

1. Edit Domain Security Policies.
   a) Select the Staffing functional area.
   b) Configure access to the *External Student Data: Student Public Reports* domain security policy.
   c) Select the Student Core functional area.
   d) Configure access to the *Student Data: Student Profile* domain security policy.

2. Edit Business Process Security Policies.

   Select the Staffing functional area. Configure any of these *Contract Contingent Worker* initiating actions on the *Contract Contingent Worker* business process:

   - Contract a contingent worker from the related actions menu of a pre-hire, former worker, inactive student, or inactive external student.
   - Search for existing pre-hires, former workers, inactive students, inactive external students, or create a new pre-hire.

Next Steps

Access the Contract Contingent Worker task to contract an inactive student or inactive external student.

Change Contingent Worker Details

Prerequisites

Complete the setup procedure in Steps: Set Up Job Changes on page 844.

Context

You can use this task to change a contingent worker's existing contract term, pay rate, or assignment details, but not to start or end a contract:

- Change Contingent Worker Details is an initiating action for the *Change Job* business process that displays only relevant fields in the Start and Details sections.
- The Job and Organizations sections are hidden, even if you configured a consolidated template. (The Compensation section is always hidden for contingent workers.)

Steps

1. As a related action on a contingent worker, select Job Change > Change Contingent Worker Details.
2. In the Start section, select the effective date and reason for the change.
   - Reasons are defined in the Maintain Event Categories and Reasons task and are designated for contingent workers.
   - You can't change the manager or supervisory organization.
3. In the Details section, specify the new contract terms or contract assignment details.

   You can't use this task to change a contingent worker's supplier. You need to correct the contract event to change the supplier.

Result

Workday adds the *Data Change* event to the worker's history.

Related Information

Concepts

Concept: Contingent Worker Purchase Orders on page 741

Tasks

Steps: Set Up Job Changes on page 844

End Contingent Worker Contracts

Prerequisites

- Configure the *End Contingent Worker Contract* business process and security policy in the Staffing functional area. If you want to track additional data for contract terminations, you can add custom fields to the business process.
- Define categories and reasons for ending contracts with the Maintain Termination Categories task. If you want to track local termination reasons, you can configure them on the Maintain Local Termination Reasons.
- Verify that the contingent worker has no pending or completed staffing or organization changes with effective dates after the contract end date.

Context

Terminate a contingent worker's contract.

Steps

1. Access the End Contingent Worker Contract task and select the Contingent Worker.
2. Complete the termination details:

Option	Description
Contract End Date	Select the date when the contract ends, typically the last day of work.
Reason	Select from the reasons you defined in the Maintain Termination Categories task.
Close Position	Leave blank if you want to keep the position open for staffing. You can't close a position that has an open job requisition.
Is this position available for overlap?	Specify whether another worker can fill the position before the incumbent departs. Available in position management organizations when you enable job overlap in the Edit Tenant Setup - HCM task.
Local Termination Reason	Select from the local termination reasons you defined on the Maintain Local Termination Reasons task. The field displays as optional or required based on the countries you configured for the *Local Termination Reason (Worker)* field on the Maintain Localization Settings task.
Last Day of Work	Automatically populates to the Contract End Date, but you can change it.
Notify Worker By	Automatically populates to the Contract End Date, but you can change it.
Regrettable	Specify whether the termination is a loss to the organization, regardless of the reason. You can use the Configure Optional Fields and the Maintain Localization Settings tasks to hide or require the field.

Next Steps

You can correct or cancel the contract termination. From the contingent worker's related actions menu, select Worker History > View Worker History; then select either Correct or Rescind as a related action on the *End Contract* event. If the position has an open job requisition, you can't rescind the event.

Related Information

Concepts

Concept: Contingent Worker Purchase Orders on page 741

Concept: Updating Effective-Dated Custom Object Data

Concept: Workday Docs

Tasks

Steps: Set Up Contingent Worker Spend

Initiate End Contingent Worker Contract in Mass Action Workbooks on page 733

Steps: Set Up Job Overlap on page 907

Steps: Set Up Workday Docs

Steps: Automate Initiation of Ending Contingent Worker Contracts

Context

You can determine how you want to initiate the *End Contingent Worker Contract* business process for up to 500 contingent workers. The Mass Operation Management (MOM) task enables you to either:

- Automatically initiate the business process.
- Use a Mass Actions workbook to process contingent workers in bulk.

Through a background job, Workday enables you to initiate the *End Contingent Worker Contract* business process automatically. Alternatively, you can review and verify the data before initiating termination by enabling the Mass Actions workbook. You don't need to set up a Mass Actions workbook to initiate the business process automatically.

Steps

1. (Optional) Set up the Mass Actions workbook.

   See Steps: Set Up Mass Actions.
2. Edit Business Process Security Policies.

   Configure the *End Contingent Worker Contract* business process security policy in the Staffing functional area.

   Add appropriate security groups to this initiating action: *End Contingent Worker Contract from Launch Mass Action Event*.

   Ensure that the security groups you configured are also on the *Mass Action Event* business process security policy.
3. Create a Segment-Based Security Group for Mass Operations.

   Create a segment-based security group with the *Initiation of End Contingent Worker Contract* segment.
4. Edit Domain Security Policies.

   Add your segment-based security group and grant View and Modify permissions.

   Security: *Mass Operation Management* domain in the System functional area.
5. Create Custom Reports.

   Create or edit an existing custom report. Ensure you use the:

   - Indexed All Workers report data source.
   - Worker report field on the Columns tab.
   - Contract End Date report field on the Field tab.

6. Access the Mass Operation Management task.

   As you complete the task, consider:

Option	Description
Primary Reason	Select the primary reason for initiating the *End Contingent Worker Contract* business process for contingent workers.
Close Position	(Optional) Select this check box to close positions associated with contingent workers who are part of a position management organization.
Is this position available for overlap?	(Optional) Select this check box to set the contingent worker's position for overlap who is part of a position management organization.
End Contingent Worker Contract	If you select this check box, the Mass Operation Management task automatically initiates a *End Contract* event for contingent workers in the custom report that: • Are active. • Don't have blocking transactions. • Have a contract end date. If you don't select the End Contingent Worker Contract check box, the Mass Operation Management task creates an entry in the Mass Actions workbook for contingent workers that: • Are active. • Have a contract end date. When the background job completes, you'll receive a notification. Access My Tasks and click the Open Workbook button to view your workbook. Click the Begin Error Validation button to ensure that there are no errors. After verifying, submit the Mass Actions workbook to initiate the *End Contingent Worker Contract* business process in bulk for all valid contingent workers.

7. (Optional) Access the Scheduled Future Processes report.

   Use this report to change the run frequency or schedule. If you need to change any other Mass Operation Configuration parameters, you must delete it and create a new one.

Next Steps

View the status of the background job for the *End Contract* events using the Mass Operation Management Runs report.

You can also manually initiate the *End Contingent Worker Contract* business process in bulk using workbooks.

Related Information

Reference

2020R2 What's New Post: Automate Initiation of Ending Contingent Worker Contracts

2020R2 What's New Post: Mass Actions in Workbooks for Termination and End Contingent Worker Contract

Steps: Set Up Mass Action Workbooks to Initiate End Contingent Worker Contract

Prerequisites

Configure the *End Contingent Worker Contract* business process and business process policy.

Context

You can set up a Mass Action workbook to initiate the *End Contingent Worker Contract* business process manually in bulk.

Steps

1. Set up Mass Action workbooks.

   See Steps: Set Up Mass Actions.
2. Edit Business Process Security Policies.

   Configure security for the *End Contingent Worker Contract from Launch Mass Action Event* initiating action on the *End Contingent Worker Contract* business process policy.

   Ensure that these security groups are also on the *Mass Action Event* business process security policy.
3. (Optional) Copy facets to a custom report and add any additional filters in the report definition to add additional facets to the Launch Mass End Contingent Worker Contract report.
4. (Optional) Create Custom Reports.

   Create or edit a custom report to use in the Launch Mass Action Event task to identify active contingent workers to populate in the workbook.

   Workday won't generate a workbook if the selected report includes more than 500 contingent workers. You can set up filter options on a custom report to filter the contingent workers you want to include.
5. (Optional) Create or edit a search report to use to access the Launch Mass Action Event task.

   Ensure that you select *Launch Mass Action Event* from the Mass Action column on the Advanced tab of the search report.

   See Steps: Create Search Reports.

Next Steps

Access the Launch Mass Action Event task to initiate the *End Contingent Worker Contract* business process manually in a workbook.

Related Information

Concepts

Setup Considerations: Org Studio and Mass Actions

Tasks

Set Up Filter Options for Custom Reports

Reference

2020R2 What's New Post: Mass Actions in Workbooks for Termination and End Contingent Worker Contract

Initiate End Contingent Worker Contract in Mass Action Workbooks

Prerequisites

- Configure the *End Contingent Worker Contract* business process and security policy.

- Set up Mass Action workbooks for ending contingent worker contracts.
- Ensure that the relevant contingent workers don't have any pending or completed staffing or organization changes effective after the contract end date.
- Security: *Mass Action Events* domain in the System functional area.

Context

You can initiate the *End Contingent Worker Contract* business process for contingent workers in bulk with a Mass Actions workbook.

You can add contingent workers to a workbook by:

- Using the Launch Mass End Contingent Worker Contract report.
- Selecting a report in the Launch Mass Action Event task.
- Using a search report to access the Launch Mass Action Event task.
- Adding them manually.

The Mass Operation Management (MOM) task also enables you to use a Mass Actions workbook to process contingent workers in bulk.

Steps

1. Access the Launch Mass Action Event task.
2. As you complete the task, consider:

Option	Description
Mass Action	Select *End Contingent Worker Contract*.
Report	To populate the workbook, select a standard report or a custom report with up to 500 contingent workers. You can filter the population by report definition parameters, if you select a custom report with configured parameters.

3. After the workbook generates, select Open Workbook.
4. As you complete the workbook, consider:

Option	Description
Share	You can share the workbook with other individuals or security groups. Members can't edit the workbook if they're only granted access to the *Complete Mass Action Event* step on the *Mass Action Event* business process policy. You can share mass action worksheets with constraint security groups but view and edit access to mass action worksheets depends on the position and domain security settings that you apply to the profiles.
Contingent Worker	If you select a report on the Launch Mass Action Event task, the number of contingent workers in the workbook can differ from the report. Workday automatically removes

Option	Description
	inactive workers, future workers, and employees in the report from the workbook.
Contract End Date	This field populates if the contingent worker has an existing contract end date. If you manually add or change a contingent worker, this field can repopulate after you update the Reason field.
Last Day of Work Notify Worker By	These fields populate from the Contract End Date field.
Begin Error Validation	Select this button to resolve any errors and submit the workbook.

Result

The *End Contingent Worker Contract* business process initiates for contingent workers in the workbook. Any other steps on the business process route for completion.

Related Information

Tasks

End Contingent Worker Contracts on page 730

Steps: Set Up Mass Action Workbooks to Initiate End Contingent Worker Contract on page 733

Steps: Set Up Mass Actions

Reference

2020R2 What's New Post: Mass Actions in Workbooks for Termination and End Contingent Worker Contract

2020R2 What's New Post: Automate Initiation of Ending Contingent Worker Contracts

Convert Contingent Workers to Employees

Prerequisites

- Configure the *Hire* business process and security policy in the Staffing functional area.
- Define categories and reasons for ending contracts with the Maintain Termination Categories task.
- Create a position or hiring restrictions for the hiring organization.

Context

The Convert to Employee task enables you to hire a contingent worker with an active contract and no future *End Contingent Worker Contract* and *Hire* event. If you have an *End Contingent Worker Contract* or *Hire* event, you must rescind them before you can use the Convert to Employee task. You can specify the details for ending the current contract and then hire the worker into the same position or a different position.

Steps

1. Access the Worker. From their related actions, select Job Change > Convert to Employee to access the task.
2. Select the Supervisory Organization.
3. Specify the Hire Date and select a Reason.

4. As you complete the task, consider:

   Workday automatically populates many of the fields with values defined on the job profile, position or job requisition. If you use job requisitions, you can't change those values; update the job requisition itself.

Option	Description
Hire Date	Select a date that's on or after the: • Recruiting Start Date on the requisition if you use job requisitions. • Earliest Hire Date on the position if you don't use job requisitions.
Reason	Only reasons for the *Hire* event are available. If you're automating the benefit enrollment process for new employees, Workday suggests you select a hire reason in this field.
First Day of Work	Automatically populates from the Hire Date, but you can change it. Correcting the Hire Date automatically corrects this date.
End Employment Date	Available when you assign the worker to a fixed-term employee type in the Employee Type field. If you configured your tenant to synchronize employment and contract end dates, Workday populates this date whenever the employee's end date for their contract changes.
Current Job	Automatically populates from the worker's contract.
Contract End Date	This date must be earlier than the Hire Date.
Last Day of Work	Automatically populates from the Contract End Date, but you can change it. Correcting the Contract End Date automatically corrects the Last Day of Work.
Reason	Select from the reasons you defined in the Maintain Termination Categories task.
Secondary Reasons	Select from the reasons you defined in the Maintain Termination Categories task.
Close Position	Leave blank if you want to keep the position open for staffing. You can't close a position that has an open job requisition.
Is this position available for overlap?	Specify whether another worker can fill the position before the incumbent departs. Available in position management organizations if Enable Job Overlap for Vacating Positions is enabled in the Edit Tenant Setup - HCM task.

Option	Description
Position	For position management organizations, select: • (If you use job requisitions), a position with an open, approved job requisition, and a Recruiting Start Date that's on or after the current date. • (If you don't use job requisitions), a position or job with an Availability Date that's on or after the current date.
Job Requisition	Available for job management and position management organizations based on tenant settings. Job Management: Available if Enable Job Requisitions for Job Management is selected. Position Management: • Required if Require Job Requisitions for All Position Management staffing events is selected. • Available if Enable Job Requisitions for Position Management based on rules is selected. Exit conditions defined on the Contract Contingent Worker business process determine whether a job requisition is required. Example: You can add an exit condition that requires job requisitions for all hiring in Canada, but not elsewhere.
Employee Type	Select from the types you defined in the Maintain Employee Types task.
Location	Select from the locations you specified on the Create Position or Set Hiring Restrictions task, or from the primary or additional locations on the job requisition.
Work Space	Select from the work spaces (such as building, floor, or cubicle) associated with the Location.
Job Profile	Select from the profiles you specified on the Create Position or Set Hiring Restrictions task.
Job Title	Populates from the Job Profile.
Business title	Populates from the Job Title. You can control the display of business titles by enabling the *Worker Data: Business Title on Worker Profile* domain security policy in the Staffing functional area.
Pay Rate Type	Select from the pay rate types available for the country associated with the Location.

Option	Description
Job Category	Populates from the Job Profile.
Job Classifications	Populates from the Job Profile.
Management Level from Job Profile	Populates from the Job Profile.
Additional Job Classifications	Select classifications as needed.
Company Insider Types	Select from the types associated with the Job Profile. Define company insider types on the Maintain Company Insider Types task. Assign them to a job profile on the Edit Job Profile task.
Workers' Compensation Code from Job Profile	Populates from the Job Profile.
Workers' Compensation Code Override	Select an override for the compensation code.
Time Type	Select from the types you specified on the Create Position or Set Hiring Restrictions task, unless you allow overrides at the tenant level. Populates from the value defined on the job profile.
Time Type Subtype	This field displays when you configure it on these tasks: • Maintain Time Type Subtype • Configure Optional Fields This functionality supports US Federal agency requirements for classifying positions, and Personnel Action Request (PAR) processing. You can also use the field for organizations that aren't related to US Federal by configuring custom field values.
Scheduled Weekly Hours	Populates from a rule when: • You've defined a working time rule. • The data populated on the task applies the rule. Populates from the Default Weekly Hours if there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position.
Location Weekly Hours	Displays the standard weekly hours associated with the Location.
Default Weekly Hours	Populates from a rule when: • You've defined a working time rule.

Option	Description
	• The data populated on the task applies the rule. Populates from the Location Weekly Hours field if there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position.
FTE	Calculated by dividing the Scheduled Weekly Hours by the Default Weekly Hours. This value displays as a percentage.
Specify a Paid FTE	Available when you enable Paid FTE on the Maintain Localization Settings task.
Paid FTE %	You can enter a percentage that overrides the FTE field for use in your Workday Compensation and Workday Payroll calculations. Available when you enable Paid FTE on the Maintain Localization Settings task.
Specify a Working FTE	Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Working FTE %	Used in custom reporting. Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Work Shift	Available when you enable Work Shift on the Maintain Localization Settings task. Available when you select the Work Shift Required check box on the job profile. Define the work shifts for a location using the Maintain Work Shifts task.
Frequency	Select from the working time frequencies you specified on the Maintain Frequencies task. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Unit	Select from the preconfigured options of hours or days. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.

Option	Description
Value	Enter the duration of the working time in selected units. Automatically populates to zero. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Appointment Type	This field displays when you configure it on these tasks: • Maintain Appointment Type • Configure Optional Fields This functionality supports US Federal agency requirements for classifying positions. You can also use the field for organizations that aren't related to US Federal by configuring custom field values.
Employee Tenure	This field displays when you configure it on these tasks: • Maintain Employee Tenure • Configure Optional Fields This functionality supports US Federal agency requirements for classifying positions, and Personnel Action Request (PAR) processing. You can also use the field for organizations that aren't related to US Federal by configuring custom field values.
Annuitant Indicator	This field displays when you configure it on these tasks: • Maintain Annuitant Indicator • Configure Optional Fields This functionality supports US Federal agency requirements for classifying positions, and Personnel Action Request (PAR) processing. You can also use the field for organizations that aren't related to US Federal by configuring custom field values.
Annual Work Period	The period of time during which a contingent worker earns an annual salary.
Work Period Percent of Year	Available if you selected Annual Work Period. Enter a percentage up to 100%. This is used to appropriately prorate the contingent worker's compensation rate.
Disbursement Plan Period	The period of time during which a contingent worker receives the annual compensation.
Continuous Service Date	Populates from the Hire Date, but you can change it.

Option	Description
	Correcting the Hire Date automatically corrects this date.
Benefits Service Date	Enables you to track length of service for benefit programs. Example: Workers become eligible for insurance after a 3-month probation period. Available for use in user-defined calculations and eligibility rules. Workday empties the field during rehire. This service date only applies to employees.
Company Service Date	Enables you to track an additional service date, such as date of acquisition. Available for use in user-defined calculations and eligibility rules. Workday empties the field during rehire. This service date only applies to employees.

Result

Workday initiates an *End Contingent Worker Contract* event that completes upon completion of the *Hire* event. The contingent worker record inactivates when the contingent worker contract ends, and the employee record activates on the hire date.

Workday assigns the *Pre-Employee as Self* security group to the worker until the Hire Date. Then Workday transfers the worker to the *Employee as Self* and *All Employees* security groups.

Next Steps

If you're converting a contingent worker whose position has a purchase order, update the purchase order manually to reflect changes resulting from the conversion. Example: If you have an existing purchase order and the contract end date changes during conversion, Workday reminds you to create a change order manually.

Related Information
Tasks

End Contingent Worker Contracts on page 730

Hire Employees on page 690

Create Hiring Restrictions on page 591

Concept: Contingent Worker Purchase Orders

You can create purchase orders or change orders as part of the staffing events for contingent workers by adding steps to some of the business processes.

Contract Contingent Worker	Add the *Create Purchase Order From Contract Contingent Worker* action after the completion step in the *Contract Contingent Worker* business process. This configuration ensures that the hire is complete before creating a purchase order. The contract details in the purchase order come from the worker's position.

	You can't generate a change order by correcting the *Contract Contingent Worker* event. However, if you configured the *Contract Contingent Worker* business process to create purchase orders, you can create one during correction.
Edit Position	Add the *Create Change Order From Contract Contingent Worker* action after the completion step in the *Edit Position* business process. This configuration ensures that any changes to the position that affect the purchase order initiate a change order after the position edit is complete.
Change Job	Add the *Create Change Order From Contract Contingent Worker* action after the completion step in the *Change Job* business process.
End Contingent Worker Contract	Add the *Create Change Order From Contract Contingent Worker* action after the completion step in the *End Contingent Worker Contract* business process. The event effective date can't be earlier than any time logged against the purchase order.
Convert to Employee	You can't add a change order step to the *Convert to Employee* business process. However, if you have an existing purchase order and the contract end date changes during conversion, Workday reminds you to create a change order manually.

Some staffing events require a manual change order because the business process step doesn't trigger automatically. You can use the Purchase Orders out of sync with HCM data source in a custom report to monitor your contingent worker purchase orders.

Concept: Contract Contingent Worker Initiating Actions

The *Contract Contingent Worker* business process offers multiple Contract Contingent Worker initiating actions to suit the needs of your organization. When configuring the business process, you can decide which initiating actions are most appropriate for your security groups. Workday recommends that your users have access to only 1 version of the Contract Contingent Worker task from Workday global search. The main differences between the Contract Contingent Worker initiating actions are the ability to:

- Use additional search fields and view staffing information in search results.
- Create pre-hires.

If your organization prioritizes preventing creation of duplicate person records, Workday recommends using 1 of the initiating actions with additional search capabilities. These versions of the Contract Contingent Worker task make it easier for you to find existing person records. In addition to the pre-hires and former workers, your search results include:

- Active workers.
- Pre-hires marked ineligible for hire.
- Active students with a pre-hire record.
- Inactive students and inactive external students without a pre-hire record.
- Terminated workers marked ineligible for rehire.

Related Information
Reference
2020R1 What's New Post: Prevent Duplicate Records During Hiring and Contracting

Reference: Employee and Contingent Worker Differences

This table provides a high-level overview of the functionality available for employees and contingent workers.

Area	Employees	Contingent Workers
Additional Job	X	
Background Check	X	X
Benefit Plans	X	X
Calibration	X	
Career Hub	X	
Career Interests	X	
Change Job	X	X
Change Photo	X	X
Compensation Packages and Plans	X	
Contact Information	X	X
Domestic Assignments	X	
Development Plan	X	X
Disciplinary Action	X	X
Employee Reviews	X	X
Give Anytime Feedback	X	X
Give Requested Feedback	X	X
Goals	X	X
Hire	Hire Employee task.	Contract Contingent Worker and Convert to Employee tasks.
International Assignments	X	
Job Interests	X	
Job Overlap	X	X
Job Requisitions	X	X
Leave of Absence	X	X
Onboarding	X	X
Open Enrollment	X	
Org Chart	X	X
Pay Groups	X	
Performance Improvement Plans	X	X
Performance Reviews	X	X
Personal Notes	X	X

Area	Employees	Contingent Workers
Personal Information	X	X
Potential	X	
Probation Periods	X	
Receive Feedback	X	X
Resignation	X	
Service Dates	X	X
Skills and Experience	X	X
Succession Plans	X	
Talent Cards	X	X
Talent Marketplace	Flex Teams and Opportunity Marketplace.	Opportunity Marketplace only.
Talent Reviews	X	
Termination	Terminate Employee task.	End Contingent Worker Contract task.
Time Off	X	X
Time Tracking	X	X

Related Information
Tasks
Contract Contingent Workers on page 723

Troubleshooting: Missing Onboarding Dashboard Items for Hired Contingent Workers

Cause: Though you terminate a contingent worker and assign a future hire date, the condition rule framework returns the former contingent worker, instead of returning a future worker.

Solution: Create calculated fields to return the hire date of future workers, and sort them in ascending order.

Steps

Security: *Custom Field Management* domain in the System functional area.

1. Create a calculated field that returns workers who you haven't terminated.
   a) Access the Create Calculated Field task.
   b) Enter these values:

Field	Value
Field Name	*Worker isn't terminated*
Business Object	*Worker*
Function	*True/False Condition*

   c) Click OK and enter these values:

Field	Value
Field	*Terminated*

Field	Value
Operator	*equal to*
Comparison Type	*Value specified in this filter*
Comparison Value	*Checked*

2. Create a calculated field that returns workers from person.
    a) Click Create Another Calculation.
    b) Enter these values:

Field	Value
Field Name	*Workers from Worker*
Business Object	*Worker*
Function	*Look Up Related Value*

    c) Click OK and enter these values:

Field	Value
Lookup Field	*Person*
Return Value	*Person*

3. Create another calculated field that returns workers from person.
    a) Click Create Another Calculation.
    b) Enter these values:

Field	Value
Field Name	*Workers from Person*
Business Object	*Worker*
Function	*Lookup Related Value*

    c) Click OK and enter these values:

Field	Value
Lookup Field	*Workers from worker*
Return Value	*Workers*

4. Create a calculated field that returns the first occurrence of a future worker in ascending order.
    a) Click Create Another Calculation.
    b) Enter these values:

Field	Value
Field Name	*Future Worker*
Business Object	*Worker*
Function	*Extract Single Instance*

    c) Click OK and enter these values:

Field	Value
Source Field	*Workers from Person*

Field	Value
Condition	*Worker is not terminated*
Sort Field	*Hire Date*
Sort Direction	*Ascending (A to Z)*
Instance to be Returned	*First occurrence*

5. Create a calculated field that returns the hire date of a future worker who you haven't terminated.
   a) Click Create Another Calculation.
   b) Enter these values:

Field	Value
Field Name	*Future hire's hire date*
Business Object	*Worker*
Function	*Look Up Related Value*

   c) Click OK and enter these values:

Field	Value
Lookup Field	*Future Worker*
Return Value	*Hire Date*

6. Click OK and click Done.

Onboarding

Onboarding Dashboard

Steps: Set Up Worker Onboarding

Context

Onboarding provides a set of tools to help you engage new workers into your organization more effectively. You can:

- Display welcome messages.
- Build lists of people and helpful contacts to meet.
- Guide workers through their onboarding tasks.
- Give workers a convenient and effective way to monitor their onboarding tasks with a visual progress indicator.
- Communicate relevant corporate and job-related information.

Onboarding also enables HR productivity. You can:

- Create electronic Forms I-9 for U.S. employment verification.
- Distribute documents to new hires and track acknowledgments or electronic signatures.
- Retrieve completed documents that new hires upload.

You can use onboarding for new hires, new contingent workers, and workers transitioning from another part of your organization. You can start the onboarding process before a worker's hire or start date, or on the first day of work.

A worker can have only 1 onboarding process in progress at a time. If a worker is already in an onboarding process, then Workday doesn't launch any other onboarding events.

Steps

1. Create Onboarding Setup Templates on page 752.
2. Access the Maintain Onboarding Reasons task.

   Create reasons for onboarding workers.

   Security: *Set Up: Onboarding* domain in the Onboarding functional area.
3. Configure the Onboarding business process.

   See Steps: Set Up Onboarding Business Process on page 747.
4. Steps: Set Up Security for Onboarding on page 749.
5. (Optional) Configure and View Alerts.

   Configure alerts to remind managers to complete the *Onboarding Setup* step.

   Copy the Onboarding Setup Events Qualified for Alerts standard report to use as the input report on the Configure Alert task.
6. (Optional) Set up an electronic Form I-9.

   See Steps: Set Up Electronic Form I-9 on page 759.
7. (Optional) Create Bulletin Worklet for Onboarding on page 754.
8. Configure Dashboard Content.

   Configure the Onboarding dashboard.
9. (Optional) Mass Advance Onboarding Setup Events on page 756.

Next Steps

You can run the Onboarding Setup Template Coverage report to ensure that each template covers the correct group of workers.

The Onboarding Status Summary report displays workers onboarded within the last 90 days. Administrators and managers can view details about the hires and their onboarding progress.

Related Information

Concepts

Concept: Adoption Navigator: Onboarding Dashboard

Tasks

Contract Contingent Workers on page 723

Hire Employees on page 690

Reference

The Next Level: Onboarding Beyond Hire

Steps: Set Up Onboarding Business Process

Prerequisites

- Configure the *Onboarding Setup* business process in the Onboarding functional area.
- Security: *Business Process Administration* or *Manage: Business Process Definitions* domain in the System functional area.

Context

You can initiate *Onboarding* for new hires and contingent workers and existing workers using the Launch Onboarding task. You can also initiate the Launch Onboarding task as a subprocess of these business processes:

- *Add Additional Job*
- *Change Job*
- *Contract Contingent Worker*
- *Hire*
- *Start International Assignment*

You can configure the Onboarding dashboard with worklets. These worklets communicate important information to new workers and prompt them to complete tasks related to their Onboarding. The *Onboarding* business process uses the worklet configuration from the *Onboarding Setup* business process step when both steps are subprocesses of a staffing event. However, when you launch *Onboarding* as a standalone business process, Workday uses the setup information from the last completed *Onboarding Setup* event.

Steps

1. Edit Business Processes.

   Configure the *Onboarding* business process. You can define the order that parallel steps display in My Tasks.
2. Add *Tasks* steps.

   Add 1 or more *Tasks* steps to enable workers to update their personal and contact information. You can combine *Contact Change*, *Name Change*, *Preferred Name Change*, and *Personal Information Change* into 1 step or split the tasks into separate, parallel steps.

   You can identify a task in the worker's My Tasks by entering a label in the Checklist Label field (Example: *Enter Personal Information*).

   See Concept: Tasks Step.
3. (Optional) Configure condition rules to skip approvals when a worker submits personal and contact information updates without making changes.

   See Concept: Step Conditions.
4. (Optional) Configure employment eligibility compliance with Form I-9.
   a) Add the *Manage Form I-9 Assignment* step before the *Complete Form I-9 Assignment* step.
   b) Add the *Complete Form I-9* step after the *Onboarding Completion* step.

   Workday doesn't initiate the *Complete Form I-9* step when *Onboarding* is a subprocess of the *Start International Assignment* business process.

   See Concept: Manage Form I-9 Assignments on page 771.
5. Add the *Change Benefit Elections* step after the *Onboarding Completion* step.
6. Add *To Do* steps for other tasks you want new hires to complete.
7. (Optional) Add the *Edit Licenses* subprocess as an action to enable all *Edit IDs* business processes to be available as a part of the *Onboarding* business process. Update the security policy for the *Edit Licenses* subprocess before adding it.
8. (Optional) Add the *Review Documents* step.

   Enable workers to acknowledge, electronically sign, or upload documents. You can include multiple documents in a single step or add separate steps for more granular tracking. You can control access to documents by creating security segments that limit the document categories that are visible to a role.

   See Steps: Maintain Access to Documents.

9. (Optional) Select Business Process > Maintain Step Delay from the related actions menu of the business process step.

   When you enable pre-hire workers to complete Onboarding steps before their start date, add a step delay to the steps that workers complete after their start date.

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
10. (Optional) Create Custom Notifications.

    Set up Onboarding email notifications to personal or work email addresses.

    You can override the email template. If you use Notification Designer, you can create a template and enable it for the *Custom Business Process* notification category. You can use the notification template to send notifications when using the *Onboarding* business process.
11. Add the *Onboarding Setup* and *Onboarding* actions to your existing *Hire*, *Contract Contingent Worker*, *Add Additional Job*, *Change Job*, or *Start International Assignment* business processes.

    When adding the *Onboarding Setup* and *Onboarding* actions to your existing business processes, consider:

    - The *Onboarding Setup* step must be 1 step before the *Onboarding* step.
    - The *Onboarding* action must come after both the completion step and the *Create Workday Account* step.
    - Don't assign security groups to the *Onboarding* action. Workday secures each step in the *Onboarding* business process separately.
    - If *Change Benefit Elections* is part of the *Onboarding* business process, remove it from the *Hire* and *Contract Contingent Worker* business processes.
    - If *Personal Information Change* and *Onboarding* are both part of the *Hire* or *Contract Contingent Worker* business processes, don't run them as parallel steps.
12. (Optional) Configure Rule-Based Business Processes.

    You can configure different *Onboarding* business process definitions for: *Add Additional Job*, *Contract Contingent Worker*, *Change Job*, *Hire*, and standalone *Onboarding*.

Next Steps

If you include a *Tasks* step in the *Onboarding* business process, provide custom instructions for workers to update their name, personal, and contact information. Use the View Business Process Template report to override the default help text for each section. You can view the Task Security tab in this report to ensure that you've synchronized your business process and domain security policies.

Related Information
Tasks
Create Custom Business Processes

Steps: Set Up Security for Onboarding

Prerequisites

Security: *Security Configuration* domain in the System functional area.

Context

Set up security for workers to complete each step of their Onboarding process. To ensure that workers can complete their Onboarding tasks, synchronize the business process and domain security policies. Business process security policies provide access to actions in the *Onboarding* business process. Domain security policies provide access to view and modify data within those actions.

Steps

1. Configure security permissions on the *Set Up: Onboarding* domain in the Onboarding functional area.

   This domain provides access to various tasks to set up Onboarding rules and templates. Restrict access on this domain to only administrators.
2. Edit Business Process Security Policies.
   a) Set up security for the *Onboarding Setup* business process.
   b) Set up security for the *Onboarding* business process.
   c) Set up security for the subprocesses that you include in the *Onboarding* business process.

      You can enable pre-hire workers to complete Onboarding steps before their start date, like pre-hire state withholding elections. Under Who Can Start the Business Process, include the *Pre-Employee as Self* and *Pre-Contingent Worker as Self* security groups.

      Under Who Can Do Actions on Entire Business Process, grant permissions to the *HR Partner*, *HR Administrator*, or other relevant HR roles in your organization. Grant *View Completed Only* permission to the same groups that have permission on the initiating action. Any pre-hire security groups with *View Completed Only* permission can see future dated events.
3. Edit Domain Security Policies.

   Set up security for the *Onboarding* business process.

Functional Area	Onboarding Action	Self-Service Domains	Worker Data Domains
Benefits	Change Benefit Elections	*Self-Service: Benefits*	*Worker Data: Benefits*
CAN Payroll	Complete Federal Withholding Elections	*Self-Service: Payroll (My Withholding Elections) - CAN*	
Contact Information	Change Emergency Contacts	*Self-Service: Emergency Contacts*	*Person Data: Emergency Contacts*
Contact Information	Contact Change	• *Self-Service: Home Contact Information* (plus subdomains) • *Self-Service: Work Contact Information* (plus subdomains)	• *Person Data: Home Contact Information* (plus subdomains) • *Worker Data: Work Contact Information* (plus subdomains)
Contact Information	Name Change	*Self-Service: Legal Name*	*Person Data: Legal Name*
Contact Information	Preferred Name Change	*Self-Service: Preferred Name*	*Person Data: Preferred Name*
Onboarding	Complete Form I-9	*Self-Service: I-9 Forms*	*Worker Data: I-9 Forms*
Personal Data	Change Self-Identification of Disability	*Self-Service: Self-Identification of Disability - USA*	*Worker Data: Self-Identification of Disability - USA*
Personal Data	Edit Government IDs	*Self-Service: Government IDs*	*Person Data: Government IDs*

Functional Area	Onboarding Action	Self-Service Domains	Worker Data Domains
Personal Data	Edit Licenses	*Self-Service: Licenses*	*Person Data: Licenses*
Personal Data	Personal Information Change	*Self-Service: Personal Data* (plus subdomains)	*Person Data: Personal Data* (plus subdomains)
USA Payroll	Complete Federal Withholding Elections	*Self-Service: Payroll (My Withholding Elections) - USA*	
USA Payroll	Manage Payment Elections	• *Self-Service: Payment Election* • *Self-Service: Payroll (My Payment Elections)* • *Self-Service: Payroll Interface (Payment Elections)*	• *Worker Data: Payroll (Payment Elections)* • *Worker Data: Payroll Interface (Payment Elections)*

On the self-service security domains, grant modify permission to the same security groups you assigned to the initiating actions. These groups include:

- *Contingent Worker as Self*
- *Employee as Self*
- *Pre-Contingent Worker as Self*
- *Pre-Employee as Self*

On the worker data domains, grant view permission, at a minimum, to the same roles you assigned to other business process actions. These roles can include *HR Administrator*, *HR Partner*, and more.

You can hide specific types of contact information (such as instant messenger or web address) by not assigning security groups to those domains.

4. Activate Pending Security Policy Changes.

Example

Secure the Contact Change task in the *Onboarding* business process so that workers can view and update only their home address, personal email address, and phone number. Add the *Employee as Self* security group to the:

- Contact Change task in the *Onboarding* business process.
- *Contact Change* business process security policy.
- *Self-Service: Home Address*, *Self-Service: Home Email*, and *Self-Service: Home Phone* domain security policies.

Don't assign the *Employee as Self* security group to the *Self-Service: Work Contact Information* domain, or to any other *Self-Service: Home Contact Information* subdomain.

Related Information
Concepts
Concept: Worker Tax Elections (USA)

Create Onboarding Setup Templates

Prerequisites

- Configure condition rules on the Create Onboarding Setup Rule task.
- Security: *Set Up: Onboarding* domain in the Onboarding functional area.

Context

Streamline the Onboarding process by creating Onboarding setup templates for different organizations and worker types. Managers use Onboarding setup templates to populate worklets on the Onboarding dashboard. Onboarding setup templates save your organization time and enable a consistent Onboarding experience among like workers.

Steps

1. Access the Maintain Onboarding Setup Template task.
2. As you complete the task, consider:

Option	Description
Template Name	Enter a unique name that identifies what workers this template might apply to. Example: *Onboarding Setup Template Employees - HR Auditor Job Profile - Country USA*.
Inactive	Select to inactivate a template.
Condition Rule Applied	Set condition rules for each template so Workday automatically populates the correct template in the manager's My Tasks.
From My Manager	In the Memo field, you can write a welcome message to the new worker.
People to Meet	Select important people for the new worker to meet, such as mentors and coworkers, from these fields: • Select People. The people you select here take precedence over the Select Role and Select Intersection Security Group fields. • Select Role. You can only select roles assigned to supervisory organizations. • Select Intersection Security Group. Selects the people assigned to the security group. • Select Worker's Team. Selects and displays all the new worker's colleagues who are in the same supervisory organization. Workday recommends that you select up to 10 people. However, there's no limit to the number of people you select. You can use these fields to set up a notification to encourage the People to Meet to welcome the new worker:

Option	Description
	• Notify. The check box always displays on the Onboarding Setup task. Your configuration determines whether or not Workday automatically selects the check box when the manager accesses the template on the Onboarding Setup task • Notification Subject. • Notification Message. The notification will display in the worker's Notifications page.
Helpful Contacts	Select people who could be helpful contacts for the new worker, such as benefits and HR partners, from these fields: • Select People. The people you select here take precedence over the Select Role and Select Intersection Security Group fields. • Select Role. You can only select roles assigned to supervisory organizations. • Select Intersection Security Group. Selects the people assigned to the security group. • Select Worker's Team. Selects and displays all the new worker's colleagues who are in the same supervisory organization. Workday recommends that you select up to 10 people. However, there's no limit to the number of people you select. You can use these fields to set up a notification to encourage the Helpful Contacts to welcome the new worker: • Notify. The check box always displays on the Onboarding Setup task. Your configuration determines whether or not Workday automatically selects the check box when the manager accesses the template on the Onboarding Setup task • Notification Subject. • Notification Message. The notification will display in the worker's Notifications page.

Result

Managers receive the Onboarding Setup task in My Tasks with the Onboarding setup template. The manager can further customize the content of the template to satisfy their needs, such as adding or removing people from the People to Meet and Helpful Contacts sections, and selecting the Notify check box.

Next Steps

(Optional) Create condition rules for announcing the Onboarding dashboard on the Create Announcement Rule task.

Create the Onboarding dashboard. The new worker will see the *People to Meet* and *Helpful Contacts* on a worklet on the dashboard.

(Optional) If you want to notify the new worker about their *People to Meet* and *Helpful Contacts*, you can create a custom notification on the *Onboarding* business process.

Create Bulletin Worklet for Onboarding

Prerequisites

Security: *Set Up: Announcements and Bulletin Worklet* domain in the System functional area.

Context

Create bulletin worklets to deliver tailored messages to different groups of workers. Although this worklet is optional, it can be a valuable part of the onboarding process by introducing new workers to the organization. Examples:

- A welcome message from the CEO.
- Messages:
    - That describe the values and culture of the company.
    - About benefits with a link to your company intranet.
    - About training with a link to an external learning management system.

You can associate a condition rule with each message to determine who receives the message. To identify the target audience for messages, use the Create Announcement Rule task. Workday currently doesn't support the Service Center Representatives worker group.

Messages are static text and aren't tied to specific onboarding tasks. To organize and manage messages more easily, you can create as many bulletin worklets as you need.

Steps

1. Access the Create Bulletin Worklet task.
2. Enter a Name for the worklet.

   Workday displays this name in prompts when you view or edit the worklet.
3. Enter a Label for the worklet.

   Workers see this label on the Onboarding dashboard.
4. Select the Onboarding option from the Landing Pages for Bulletin Worklet prompt.

   You can use the Maintain Dashboards task to change the default dashboard name from Onboarding.
5. Add a row for each message and enter details.

Option	Description
Rule	Select a condition rule that identifies the message recipients. If you leave this field blank, all workers see this message.
Message From / Message Title	Specify who the message is from, or enter a message title.
Show Current Photo / Upload Custom Image	Display the message sender's worker profile photo or a custom image, such as a logo.

Option	Description
	If the message sender doesn't have a photo, Workday displays a gray silhouette. Custom images must conform to the file size limit and permitted file types for your tenant. To select an existing image or create an image, select Upload Custom Image. Because Workday crops the images in bulletin worklets into circles, use square images for best results. Images in any other shape don't fit properly, resulting in white spaces in the circular area. Workday recommends 150 x 150 pixels for images. If you select None of the above, Workday displays a gray silhouette for messages from senders. For messages with titles only, Workday displays a stock image of paper and eyeglasses.
Message	Enter the message. Click Format Text to open a larger field with a rich text editor.
Video	Specify a title and description then select a preview image and enter the URL for the video (hosted outside of Workday). Videos open in separate browser tabs.

Example

Rule	Message From / Message Title	Show Current Photo / Upload Custom Image	Message
Active Employees	Our Company Culture	Tenant Logo	Our culture comes from the passion, creativity, and positive attitude of our employees. We believe in an open and honest approach to business, where everyone can contribute and make a difference.
Active Employees in U.S.	Maria Cardoza	Current Photo	Your satisfaction with your benefits program is as important to us as it is to you. We work diligently to provide you with a benefit package that helps keep you healthy and meets the needs of your family. Learn more about your

Rule	Message From / Message Title	Show Current Photo / Upload Custom Image	Message
			benefit plans by visiting our company intranet.

Related Information

Tasks

Steps: Set Up Worker Onboarding on page 746

Mass Advance Onboarding Setup Events

Prerequisites

- Initiate the *Onboarding Setup* subprocess as part of a staffing business process.
- Security: *Custom Report Creation*and *Mass Operation Management* domains in the System functional area.

Context

If managers are busy, they might not complete the *Onboarding Setup* step, which means the *Onboarding* subprocess isn't initiated. You can ensure that the Onboarding dashboard is available for new workers in a timely manner by mass advancing incomplete *Onboarding Setup* events to completion.

Steps

1. Access the Copy Standard Report to Custom Report task.

   Create a custom report based on the Onboarding Setup Events Qualified for Auto Advance standard report to identify the *Onboarding Setup* events you want to advance to completion.
2. Access the Mass Operation Management task.

   As you complete the task, select:

Option	Description
Mass Operation Type	Select *Advance Business Process*.
Input Report	Select the custom report you just created.
Run Frequency	Select a run frequency.
3. On the Mass Operation Configuration tab, select the Send to Completion check box to ensure that the mass operation automatically advances the *Onboarding Setup* events to completion.

Result

When the mass operation successfully completes:

- The in progress *Onboarding Setup* subprocesses that meet the input report criteria complete.
- Workday initiates the next step in the parent process definition, which should be *Onboarding*.

Related Information

Tasks

Copy Reports

Set Up Mass Operations

Onboarding Landing Page

Set Up Onboarding Landing Page

Prerequisites

Note: We plan to retire the Onboarding landing page and campaigns worklets in a future update. Workday recommends that you configure the Onboarding dashboard and worklets for a more personalized onboarding experience.

- Create a campaigns worklet for onboarding.
- If you want to deliver messages to new hires, create 1 or more bulletin worklets for onboarding.
- Security: *Set Up: Tenant Setup - Worklets* domain in the System functional area.

Context

Set up the Onboarding landing page to welcome new workers to your organization and coordinate their onboarding activities. Create a custom page title, provide instructional text that explains the onboarding process, and select the worklets that the landing page displays.

Steps

1. Access the Maintain Dashboards report.
2. In the Home row, click Edit.
3. In the Worklets section on the Content tab, add the campaigns worklet for onboarding.

   This worklet navigates workers from the Home page to the Onboarding landing page. The selection list displays the worklet Name that you defined in the Create Campaigns Worklet task.

   Landing pages display up to 12 worklets. If you have more than 12 worklets, adjust your configuration to ensure that the campaigns worklet displays on your landing page.
4. Click Done.
5. In the Onboarding Landing Page (Do Not Use) row, click Edit.
6. Click Add.
7. In the Worklets section on the Content tab, add the Your Onboarding Checklist worklet to the grid.

   This worklet directs new hires to My Tasks to complete the actions and *To Do* tasks that you defined in the *Onboarding* business process.
8. Add bulletin and custom worklets to the grid.

   You can't personalize the Onboarding landing page. It requires all worklets.

Result

New hires see the campaigns worklet on the Home page every time they sign in to Workday. They can click Take Me There to navigate to the Onboarding landing page, which displays how many onboarding tasks they must complete. The landing page also displays any bulletin worklets or custom worklets that you set up.

The Checklist has a Go to My Tasks button for workers to access their onboarding tasks. When they're finished, access to the Onboarding landing page ends and the campaigns worklet disappears.

Example

Onboarding Dashboard

Dashboard	Description
Welcome!	We're excited you are now part of our company! Here is your Checklist of onboarding tasks. Check out the Getting Started announcements for information to help guide you during your first few weeks with us. Our culture is one of the main reasons that our employees join us and thrive. Our Company Experience tells you more.

Required Worklets

Worklet	Required for Groups
Your Onboarding Checklist	*Contingent Worker as Self* *Employee as Self* *Pre-Contingent Worker as Self* *Pre-Employee as Self*
Getting Started	*All Users*
Our Company Experience	*All Users*

Create Campaigns Worklet for Onboarding

Prerequisites

Note: We plan to retire the Onboarding landing page and campaigns worklets in a future update. Workday recommends that you configure the Onboarding dashboard and worklets for a more personalized onboarding experience.

Security: *Set Up: Campaigns Worklet* domain in the System functional area.

Context

Create a campaigns worklet to highlight the onboarding process and guide new hires to the Onboarding landing page. This worklet displays on the Home landing page until workers complete the steps in the *Onboarding* business process.

Steps

1. Access the Create Campaigns Worklet task.
2. Specify a Name for the worklet, such as *Onboarding*.
   Workday displays this name in prompts when you view or edit the worklet.
3. Create a Label for the worklet, such as *Getting Started*.
   Workers see this label next to the worklet bubble on the Home landing page.
4. At the Landing Pages for Campaigns Worklet prompt, select *Home*.
5. In the Campaign grid, add a row and specify campaign details:

Option	Description
Title Text	The title displays at the top of the worklet.
Message	The message displays above the image on the worklet.
Image	The image (such as your company logo) displays at the center of the worklet. The logo must be in BMP, GIF, JPEG, or PNG format with a recommended size of 500 x 500.
Campaign Type	Select *Onboarding*.

Example

Title Text	Message	Image	Campaign Type
Welcome!	Here is a quick To Do list for your first week on the job.	company_logo.jpg	Onboarding

Next Steps

(Optional) Create a bulletin worklet for onboarding. Then, set up the Onboarding landing page and add the campaigns worklet to the Home page.

Form I-9

Steps: Set Up Electronic Form I-9

Prerequisites

Confirm your Form I-9 compliance requirements and processes before enabling this functionality. Workday enables you to create a legal Form I-9, but doesn't assume responsibility for compliance.

Context

The Workday electronic Form I-9 and optional *E-Verify* integration streamlines employment authorization, reduces paperwork, and minimizes manual data entry. You can use the electronic Form I-9 for newly hired and rehired employees who work in the U.S.

Note: Workday applies a version and date stamp to each official update of the Form I-9. All Workday tasks, reports, printing, and web service functions use the correct version of the Form I-9 based on the date it was created. Example: If you compare a Form I-9 created 1/1/2015 with another created on 8/2/2023, the layouts differ because an updated Form I-9 went into effect on 8/1/2023.

Steps

1. Configure the *Complete Form I-9* business process in the Onboarding functional area.
   See Steps: Set Up Complete Form I-9 Business Process on page 762.
2. Configure the *Amend Form I-9* business process in the Onboarding functional area.
   See Steps: Set Up Amend Form I-9 Business Process on page 765.
3. Configure the *Internal Audit Form I-9* business process in the Onboarding functional area.
   Add the *Initiation* step on the *Internal Audit Form I-9* business process definition.
4. Configure the *Complete Form I-9 Section 3* business process in the Personal Data functional area.
   Add the *Initiation* step on the *Complete Form I-9 Section 3* business process definition.
5. Set up security policies for electronic Form I-9 domains and business processes.
   See Steps: Set Up Security for Electronic Form I-9 on page 760.
6. (Optional) Maintain Form I-9 Settings on page 768.
7. (Optional) Complete Set Up and Upgrade Prerequisites for E-Verify Integration.

Result

You can create and complete electronic Forms I-9 to verify that your employees are eligible to work in the U.S.

Next Steps

- Add the Form I-9 Process Status worklet to the Home landing page for tracking purposes.
- From the main menu, select Sitemap > Personal Data for a list of Form I-9 tasks and reports.

Related Information

Concepts

Concept: Electronic Form I-9 Workflow on page 775

Concept: Electronic Form I-9 and Retry Button Limitations on page 777

Concept: Purging Electronic Forms I-9 on page 778

Tasks

Steps: Set Up Worker Onboarding on page 746

Steps: Manage Electronic Form I-9 on page 766

Steps: Set Up Security for Electronic Form I-9

Prerequisites

Security: *Security Configuration* domain in the System functional area.

Context

Set up security for the electronic Form I-9 so that employees can complete the form and support partners can review and verify the data.

Note: Workday enables you to create a legal Form I-9, but doesn't assume responsibility for compliance.

Steps

1. Edit Business Process Security Policies.

   Configure these Form I-9 business processes in the Onboarding and Personal Data functional areas and assign security groups to actions. As you complete this task, consider:

Business Process	Suggested Security Groups
Complete Form I-9	Grant permission on the *Complete Form I-9* initiating action to the *Employee as Self* security group. If you have pre-hire workers, add the *Pre-Employee as Self* security group on the initiating action so that they can complete the Form I-9 before their start date. Workday recommends that you grant *View All* permission to the security groups that have permission on the initiating action.
Amend Form I-9	Grant permission on the *Form I-9 Section 1 - Amend* action to the *Employee as Self* security group. Grant *View All* permission to the *Employee as Self* security group in addition to the security groups that have permission on the initiating actions.
Manage Form I-9 Assignment	Assign the relevant security groups to actions on the business process, such as *HR Administrator*, *HR Partner*, or other relevant roles.
Internal Audit Form I-9	Assign the relevant security groups to actions on the business process, such as *HR Administrator*, *HR Auditor*, or other relevant roles.
Complete Form I-9 Section 3	Assign the relevant security groups to actions on the business process, such as *HR Administrator*, *HR Auditor*, or other relevant roles.

2. Edit Domain Security Policies.

   Configure these domains in the Onboarding functional area. Grant domain security permissions for viewing Forms I-9, worker IDs, and Form I-9 attachments, as well as for E-Verify resubmission.

Domain	Suggested Security Groups	Permission
Process: I-9 Forms	*HR Administrator* *HR Partner*	View
Process: Resubmit: Form I-9	*HR Administrator* *HR Partner*	View and Modify
Self-Service: Form I-9 Attachments in View	*Employee as Self* *Pre-Employee as Self*	View

Domain	Suggested Security Groups	Permission
Self-Service: I-9 Forms	*Employee as Self* *Pre-Employee as Self*	View
Worker Data: Form I-9: Additional Information	*HR Administrator* *HR Partner*	View and Modify
Worker Data: Form I-9 Attachments	*HR Administrator* *HR Partner*	View
Worker Data: I-9 Forms	*HR Administrator* *HR Partner*	View and Modify

The *Worker Data: I-9 Forms* domain secures the Form I-9 Process Status report. The *Process: I-9 Forms* domain secures additional Form I-9 reports and *E-Verify* integration details.

Workday doesn't recommend configuring the *Self-Service: Form I-9 Attachments in Events* domain. You can potentially expose a worker's personal data if you attach the wrong document to another worker's Form I-9. Even when you delete the wrong attachment, it's still included and displayed in event views.

3. Activate Pending Security Policy Changes.

Steps: Set Up Complete Form I-9 Business Process

Prerequisites

- To use the *E-Verify* integration, create the integration before you configure the integration steps on the *Complete Form I-9* business process.
- Security: These domains in the System functional area:
  - *Business Process Administration*
  - *Manage: Business Process Definitions*

Context

You can set up the *Complete Form I-9* business process so employees can create an electronic Form I-9 to verify U.S. employment eligibility. You can use the *Complete Form I-9* business process independently or as an action on the *Onboarding* business process. You can include integration steps on the *Complete Form I-9* business process to submit employee data to the *E-Verify* integration for work authorization.

When it's part of the *Onboarding* business process, the *Complete Form I-9* action step must come after the:

- *Name Change* and *Contact Change* tasks complete. When you prepopulate the Form I-9, Workday makes the employee's name and home address available for the Form I-9.
- *Completion* step on the *Onboarding* business process, for faster employment verification, as the integration pauses until *Onboarding* is complete.

Note: Workday enables you to create a legal Form I-9 but doesn’t assume responsibility for compliance.

Steps

1. Edit Business Processes.

   Configure the *Complete Form I-9* business process in the Onboarding functional area.

   Use this business process step order:

   - When you use the *E-Verify* integration, include steps *a* - *j*.
   - When you enter data into the E-Verify website manually or you don't use E-Verify, include steps *a*, *b*, and *j*.

Order	If	Type	Specify
a		Initiation	
b		Action	Review Form I-9
c	U.S. Employment Not Already Authorized? (Workday Owned)	Service	E-Verify Initial or Reverification
d	E-Verify identifies cases with the same SSN in last 365 days? (Workday Owned)	Action	E-Verify Duplicate Case Check
e	Close duplicate cases and create a new case at E-Verify? (Workday Owned)	Service	E-Verify Close Duplicate and Create New Case
f	Case is queued? (Workday Owned)	Service	E-Verify Queued Case
g	Case requires a photo match? (Workday Owned)	Action	E-Verify Photo Match
h	Case requires a photo match? (Workday Owned)	Service	E-Verify Confirm Photo
i	Case requires review of potentially incorrect data? (Workday Owned)	Service	Create New I-9 Event for E-Verify Reverification
j	U.S. employment eligibility status pending? (Workday Owned)	Action	Final U.S. Employment Verification Status

   (Optional) Add an *Approval* step after *b* and before *c* for an additional review of Form I-9 supporting documents.

   The *Completion* step must be step *b* or the optional *Approval* step. Make the *Approval* step the business process *Completion* step.

2. (Optional) Select Business Process > Maintain Step Conditions from the related actions menu of step *b*.

   To require a Social Security Number on Section 1 of the Form I-9, add a row on the Validation Conditions tab and select *Create Condition Rule* on the Rule prompt.

   Build a condition rule based on this Workday-delivered report field for IDs:

Source External Field for Condition Rule	Relational Operator	Comparison Type	Comparison Value
Is Social Security Number Available on Form I-9 Event	equal to	Value specified in this filter	No

3. Select Business Process → Maintain Advanced Routing from the related actions menu of the *Review Form I-9* step.

   Add a routing restriction to ensure that HR partners aren't assigned to the step for their own Form I-9.
4. (Optional) Select Business Process → Maintain Help Text from the related actions menu of the business process.

   Add help text for E-Verify by providing instructions for step *b*.

   In the Help Text column, enter this message: *When using E-Verify, any document presented for Type B must have a photograph that matches the employee.*
5. (Optional) From the related actions menu of the business process, select Business Process → Edit Definition.

   When you use E-Verify, click these buttons to configure the integration:

   - Configure E-Verify Initial or Reverification
   - Configure E-Verify Close Duplicate and Create New Case
   - Configure E-Verify Confirm Photo

   On the Configure E-Verify Event Service page, select the same *E-Verify* integration system.
6. (Optional) Select Business Process → Maintain Step Label Override from the related actions menu for steps *g* and *j*.

   When you use E-Verify, specify these step label overrides:

   - Step *g*: Photo Match
   - Step *j*: Finalize
7. (Optional) Create Custom Notifications.

   For E-Verify, inform an HR partner when an employee doesn't have authorization to work. Use the U.S. Employment Verification Status report field to create a notification rule.

Related Information

Concepts

Concept: Approval Step

Concept: Step Conditions

Tasks

Steps: Set Up Worker Onboarding on page 746

Create Custom Business Processes

Reference

https://community.workday.com/node/667851

Steps: Set Up Amend Form I-9 Business Process

Prerequisites

- If you plan on using the *E-Verify* integration to update Form I-9 receipts, create the integration system before you configure the integration steps on the *Amend Form I-9* business process.
- Security: These domains in the System functional area:
    - *Business Process Administration*
    - *Manage: Business Process Definitions*

Context

Set up the *Amend Form I-9* business process so that you can:

- Send back Section 1 of the Form I-9 to an employee so they can correct it.
- Make changes to Section 2 of an employee's Form I-9.
- Add, delete, or update any attachments on an employee's Form I-9.
- Use the Update Form I-9 Receipts task to update an employee's Form I-9 once you receive the document they initially presented a receipt for.

If you want to submit an employee's Form I-9 to E-Verify once you receive the document that they initially presented a receipt for, you can include integration steps on the *Amend Form I-9* business process.

You can also configure advanced routing fields on the *Amend Form I-9* business process when you use multiple *E-Verify* integrations.

Forms will only be sent to E-Verify through the *E-Verify* integration using the Update Form I-9 Receipts task.

Note: You can't amend Section 3 data after you submit the task in Workday.

Steps

1. Edit Business Processes.

   Configure the *Amend Form I-9* business process in the Onboarding functional area.

   Order the business process steps as shown. When you use the *E-Verify* integration, include steps *c* - *h*. The *Completion* step must be on or after step *b*, and before step *g* or step *i*.

Order	If	Type	Specify
a		Initiation	
b	Amend Section 1? (Workday Owned)	Action	Form I-9 Section 1 - Amend
c	Update Form I-9 Receipts? (Workday Owned)	Service	E-Verify Initial or Reverification
d	E-Verify identifies cases with the same SSN in last 365 days? (Workday Owned)	Action	E-Verify Duplicate Case Check - Amend
e	Close duplicate cases and create a new case at E-Verify? (Workday Owned)	Service	E-Verify Close Duplicate and Create New Case

Order	If	Type	Specify
f	Case is queued? (Workday Owned)	Service	E-Verify Queued Case
g	Case requires a photo match? (Workday Owned)	Action	E-Verify Photo Match - Amend
h	Case requires a photo match? (Workday Owned)	Service	E-Verify Confirm Photo
i	U.S. employment eligibility status pending? (Workday Owned)	Action	Final U.S. Employment Verification Status - Amend

2. (Optional) From the related actions menu of the business process, select Business Process → Edit Definition.

   When you use E-Verify, click these buttons to configure the integration:

   - Configure E-Verify Initial or Reverification
   - Configure E-Verify Close Duplicate and Create New Case
   - Configure E-Verify Confirm Photo

   On the Configure E-Verify Event Service page, select the same *E-Verify* integration system.
3. (Optional) Select Business Process → Maintain Step Label Override from the related actions menu for steps *g* and *i*.

   When you use E-Verify, specify these step label overrides:

   - Step *g*: Photo Match
   - Step *i*: Finalize
4. (Optional) Create Custom Notifications.

   For E-Verify, inform an HR partner when an employee doesn't have authorization to work. Use the U.S. Employment Verification Status report field to create a notification rule.
5. (Optional) Maintain Form I-9 Settings on page 768.

   When you use E-Verify, select the Collect advanced routing fields when Updating Form I-9 Receipts check box.

Related Information

Tasks

Create Custom Business Processes

Reference

https://community.workday.com/node/667851

Steps: Manage Electronic Form I-9

Prerequisites

Set up the electronic Form I-9 business processes, security policies, and optional *E-Verify* integration.

Context

Use these tasks and reports as needed to ensure that Forms I-9 for your employees are accurate and up-to-date.

Steps

1. Access the Form I-9 Internal Audits report.

   Review a list of completed Forms I-9, including the latest audit date and whether the audit is current. You can audit a Form I-9 for an employee as often as needed. Select a form to verify that the information is accurate, and finalize the audit when it's complete.

   Security: *Audit: I-9 Forms* domain in the Personal Data functional area.
2. Access the Form I-9 Audit Trail report.

   Review Form I-9 activity, including records of external Form I-9, for a specified time period. You can filter by organization, establishment, employee, or location. You can view the business process history and status for these business processes:

   - *Amend Form I-9*
   - *Audit Form I-9*
   - *Complete Form I-9*
   - *Complete Form I-9 Section 3*
   - *Manage Form I-9 Assignment*

   Security: *Audit: I-9 Forms* domain in the Personal Data functional area.
3. Access the Form I-9 Audit Trail Details report.

   Review granular details about a single Form I-9, including ones completed through the remote hire process.

   You can access this report by using the:

   - View Audit Trail button when viewing an employee's latest Form I-9.
   - Related action off of the *Complete Form I-9* or *Complete Form I-9 Section 3* business process in the View Worker History report.

   Security: *Audit: I-9 Forms* domain in the Personal Data functional area.
4. Access the Amend Form I-9 task.

   Make changes to a completed Form I-9. For Section 1 changes, specify those items on the Instructions for Employee field and send the form back to the employee. For changes to Section 2 or an attachment, you must edit the form. Any changes made by you or the employee display on the Form I-9 Amended Data table when you view their Form I-9. You can amend any Form I-9 with an *Employment Authorized* status.

   Configure the *Amend Form I-9* business process and security policy in the Onboarding functional area.
5. Track Form I-9 Receipts.

   Record when an employee submits a Form I-9 receipt instead of an original document to verify their U.S. employment eligibility status.
6. Access the Complete Form I-9 Section 3 task.

   Reverify the U.S. employment eligibility status for an employee, update their Form I-9 when they have a legal name change, or enable the rehire process.

   Configure the *Complete Form I-9 Section 3* business process and security policy in the Personal Data functional area.

Next Steps

View and print Forms I-9 with attachments.

Related Information

Tasks

Steps: Set Up Electronic Form I-9 on page 759

Reference

Reference: Printing Electronic Forms I-9 on page 778

Maintain Form I-9 Settings

Prerequisites

Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

Context

Configure how the electronic Form I-9 displays on your Workday tenant.

Steps

1. Access the Maintain Form I-9 Settings task.
2. As you complete the task, consider:

Option	Description
Default HR Employee Data into Section 1 of Form I-9	Automatically populates these contact and personal information fields on Section 1 if the data exists on the employee's HR record in Workday: • Name • Address • Date of birth • SSN • Phone number • Email address
Default HR Employer Name and Title Data into Form I-9	Automatically populates these employer fields on Sections 2 and 3 if the data exists on the employee's HR record in Workday: • Section 2: First name, last name, and title of employer or authorized representative. • Section 3: Name of employer or authorized representative.
Override employee profile Date of Birth and SSN with Form I-9 data	Automatically populates date of birth and SSN from an employee's *Complete Form I-9* event to their profile. Note: Assess the impact of selecting this check box. Workday automatically updates employee SSN and date of birth values without notifications or requiring confirmation.
Electronic Form I-9 Section 2 Business Name and Address	If you select an option from the Default Business Name and Address prompt, Workday automatically populates this information into Section 2. If you configure values on the Select Business Name and Address from List grid and select a default, Workday automatically populates this information into Section 2.

Option	Description
Remote Form I-9 Section 2 Business Name and Address	If you don't configure this section, Workday automatically populates the authorized representative's company address into Section 2. Note: For Remote Forms I-9, the authorized representative refers to the user or role that you configured on the Manage Remote Form I-9 shared participation step in the *Complete Form I-9* business process.
Form I-9 Internal Audit Data	Include the Internal Audit Reason and Internal Audit Conclusion fields. You can optionally display, hide, or require these fields.
Manage Form I-9 Assignment	Create reasons for assigning or not assigning a Form I-9 to an employee who already has 1 in Workday.
Manage Remote Form I-9 Process	Select HR roles select authorized representative to give HR roles the ability to designate an external authorized representative who can complete Section 2 of the Form I-9. By default, Workday automatically enables employees to designate their own external authorized representative.
Authorized Representative Relationships for Remote Employees	Configure options that employees can select as an authorized representative to complete their Form I-9.
Remote Form I-9 Attestation Text	Create custom attestation text that authorized representative must attest to before completing Section 2 of the Form I-9.
Remote Form I-9 Attachment Instructions	Create custom instructions that display when an authorized representative attaches documents to Section 2 of the Form I-9.
Remote Form I-9 Email Notification Text	Create custom text that displays in the email sent to an authorized representative to complete Section 2 of the Form I-9.
Manage E-Verify Duplicate Case Reasons	Create reasons for submitting duplicate cases to E-Verify. Note: This field is only available to customers who are on E-Verify v30.
Form I-9 Default Overdue Reason	Configure the overdue reason that automatically populates on the *E-Verify - Employment Verification* integration template when you mass resubmit Forms I-9 to E-Verify.
Advanced Routing for Amend Form I-9 Business Process	Select the Collect advanced routing fields when Updating Form I-9 Receipts check box to add the Organization and Company fields to the Update Form I-9 Receipts task.

Option	Description
	Configure these fields on the *Amend Form I-9* business process to route a Form I-9 correctly to E-Verify. When you've 2 or more *E-Verify* integrations, the check box enables you to send Form I-9 data to the correct *E-Verify* integration.
Form I-9 Attachment Options	You can print Forms I-9 and attachments. Select: • *Ask Before Printing Form I-9 Attachments* • *Always Print Form I-9 Attachments*. This option also enables you to print attachments when you click the print icon while viewing a worker's Form I-9. Note: The maximum number of Form I-9 documents that you can print at one time is 100.
Form I-9 Language Options in Puerto Rico	Specifies how the electronic Form I-9 displays for workers located in Puerto Rico. Workday displays the Form I-9 in the language that you select, regardless of the employee's preference. Sections 2 and 3, the View Form I-9 for Worker report, and the Print Form I-9 task also display in the language you select. When you enable employees to select their language for the Form I-9, you must complete Sections 2 and 3 in their selected language, regardless of your preference.

Related Information

Tasks

Steps: Set Up Electronic Form I-9 on page 759

Hide or Require Optional Fields

Reference

https://community.workday.com/node/730024

https://community.workday.com/node/786635

Track Form I-9 Receipts

Prerequisites

- If you use the *E-Verify* integration, add integration steps on the *Amend Form I-9* business process.
- Configure the *Complete Form I-9* and *Amend Form I-9* business processes and security policies in the Onboarding functional area.

Context

Record any of these receipts on an employee's Form I-9 to indicate that they’re temporarily authorized to work in the United States:

- A receipt showing that they've applied to replace a lost, stolen, or damaged List A, B, or C document.
- The arrival portion of Form I-94 or I-94A with a temporary I-551 stamp (with photo).
- The departure portion of Form I-94 or I-94A.

You can also:

- View who has Forms I-9 with receipts and when those receipts expire.
- Update an employee's Form I-9 when you receive the document that they initially presented a receipt for.

Steps

1. Access My Tasks and select the Form I-9 of the employee that you want to record a receipt for.
   a) On Section 2 of the Form I-9, select the Document presented is a receipt check box on List A, B, or C.

      When you select an I-94 or I-94A document, Workday automatically selects the Document presented is a receipt check box.
   b) Enter the Document # and Expiration Date of the receipt.
2. (Optional) Access the Audit Form I-9 Receipts report to view employee Forms I-9 with receipts.
3. Access the Update Form I-9 Receipts task to update an employee's Form I-9 when you receive the document that they initially presented a receipt for.
   a) If the Organization and Company fields display, select the organization and company that are most closely associated with the employee's Form I-9. These fields only display if:
      - You select the Collect advanced routing fields when Updating Form I-9 Receipts check box on the Maintain Form I-9 Settings task.
      - You configure security access on the *Worker Data: Form I-9: Additional Information* domain.
   b) Clear the Document presented is a receipt check box.
   c) Update the Document # and Expiration Date fields with the document number and expiration date of the actual document.

   You must have permission on the *Update Form I-9 Receipts* initiating action on the *Amend Form I-9* business process security policy.

Result

The employee's Form I-9 no longer displays on the Audit Form I-9 Receipts report.

When you configure the *E-Verify* integration in your tenant, Workday sends an employee's Form I-9 to E-Verify when it meets these conditions:

- The Form I-9 was amended through the *Update Form I-9 Receipts* initiating action.
- The Form I-9 doesn't have an E-Verify case number.

Note: Form I-94 or I-94A documents are sent to E-Verify as part of the *Complete Form I-9* business process. When you update these receipts on an employee's Form I-9, their form won't be sent to E-Verify again.

Related Information
Tasks
Steps: Set Up Amend Form I-9 Business Process on page 765
Maintain Form I-9 Settings on page 768

Concept: Manage Form I-9 Assignments

You can assign a Form I-9 to a worker who has an existing 1 in Workday using the:

- *Manage Form I-9 Assignment* business process.
- Manage Form I-9 Assignment for Worker task.

Manage Form I-9 Assignment Business Process

The *Manage Form I-9 Assignment* business process enables you to determine if a worker requires an additional form. You can assign another Form I-9 as part of an Onboarding action, which includes a step for the Complete Form I-9 task.

To use the *Manage Form I-9 Assignment* business process, you must:

- Configure it on the *Onboarding* business process before the *Complete Form I-9* action.
- Apply all of these condition rules:
    - There's a Form I-9 already in Workday.
    - The Form I-9 has a status of *Employment Authorized*.
    - Onboarding is a subprocess of the *Add Additional Job* or *Change Job* business process.
    - The position for *Add Additional Job* or *Change Job* is in the United States.

You can create reasons for assigning or not assigning a Form I-9 in the Manage Form I-9 Assignment section on the Maintain Form I-9 Settings task.

If you use 2 or more *E-Verify* integrations, select the Collect advanced routing fields when Updating Form I-9 Receipts check box from the Maintain Form I-9 Settings task.

Manage Form I-9 Assignment for Worker Task

You can use the Manage Form I-9 Assignment for Worker task to assign a Form I-9 to a worker outside of the *Onboarding* business process. To assign a Form I-9, you must add a Complete Form I-9 action to the *Manage Form I-9 Assignment* business process.

You can create reasons to assign a Form I-9 in the Manage Form I-9 Assignment section on the Maintain Form I-9 Settings task. When you assign Forms I-9 with this task, Workday doesn't send them to E-Verify.

Note: This task enables you to assign a Form I-9 to an employee, not a pre-employee.

The Organization prompt on the Manage Form I-9 Assignment for Worker task only lists supervisory organizations. The HR partner by location must exist in the supervisory organization and not just on the location.

Concept: Electronic Form I-9 Section 3

You can use the Complete Form I-9 Section 3 task to complete a Section 3 for:

- Updating an employee's legal name.
- Rehires.
- Reverifying expiring documents.

When you complete Section 3, you can add attachments. To delete attachments, you can access the Amend Form I-9 task.

Note: You can't amend Section 3 data after you submit the task in Workday.

Form I-9 Section 3 for Rehires

You can assign relevant security groups to the *Complete Form I-9 Section 3 as Sub of Hire* initiating action on the *Complete Form I-9 Section 3* business process security policy.

You can enable rehires to complete Section 3 by adding the:

- *Complete Form I-9* action step on the *Onboarding* business process.
- *Complete Form I-9 Section 3* action step on the *Hire* business process.

When you add the *Complete Form I-9 Section 3* action step on the *Hire* business process, this automatically includes the Workday owned *Form I-9 Rehire* condition rule. If you don't configure the *Complete Form I-9 Section 3* action step on the *Hire* business process, the Complete Form I-9 task always initiates and assigns a new Form I-9 to rehire employees.

The *Form I-9 Rehire* condition rule applies when:

- You rehire employees within 3 years of completing their original Form I-9. Workday uses the employer or authorized representative's signature date as the completion date.
- Complete their original form using the Workday electronic Form I-9, revision 2013 or later, or have a Record of External Form I-9.
- Employees have a U.S. employment eligibility status of *Employment Authorized* or *External Record*.

Form I-9 Section 3 for Reverification of Expiring Documents

You can reverify expiring documents for employees who have:

- An existing electronic Form I-9 in Workday.
- A U.S. employment eligibility status of *Employment Authorized* or *External Record*.

If you’re reverifying an expiring Form I-9 document for an employee who presents you with a receipt, you can select the Document presented is a receipt check box. When you receive the actual document, you must complete the Complete Form I-9 Section 3 task for them again.

To view employees and their Form I-9 documents with expiration dates, you can access the U.S. Employees with Form I-9 Expiring Documents report.

Revisions of Form I-9 Section 3

The information that Workday displays when you complete or view a Form I-9 Section 3 depends upon the Form I-9 and the Form I-9 Section 3 revisions. This table explains what you see in Workday based on the Form I-9 revision year.

Form I-9 Revision	Form I-9 Section 3 Revision Year	Complete Form I-9 Section 3 Task	View Form I-9 for Worker Task
2009	N/A	N/A	N/A
2013	2016	N/A	Workday displays the 2016 Form I-9 with a: • Blank Section 1 and Section 2. • Completed Section 3. • Link to the 2013 Form I-9.
2013	2017	Workday displays the 2017 Form I-9 with a blank Section 1 and Section 2. You can complete a 2017 Section 3.	Workday displays the 2017 Form I-9 with a: • Blank Section 1 and Section 2. • Completed Section 3. • Link to the 2013 Form I-9.
2013	2019	Workday displays the 2019 Form I-9 with a blank Section	Workday displays the 2019 Form I-9 with a:

Form I-9 Revision	Form I-9 Section 3 Revision Year	Complete Form I-9 Section 3 Task	View Form I-9 for Worker Task
		1 and Section 2. You can complete a 2019 Section 3.	• Blank Section 1 and Section 2. • Completed Section 3. • Link to the 2013 Form I-9.
2016	2017	Workday displays the 2016 Form I-9 with a completed Section 1 and Section 2. You can complete a 2017 Section 3.	Workday displays the 2017 Form I-9 with a completed: • Section 1 and Section 2. • 2017 Section 3.
2017	2019	Workday displays the 2017 Form I-9 with a completed Section 1 and 2. You can complete a 2019 Section 3.	Workday displays the 2017 Form I-9 with a: • Completed Section 1 and 2. • Completed 2019 Section 3. • Link to the 2017 Form I-9.
2019	2023	Workday displays the 2019 Form I-9 with a completed Section 1 and 2. You can complete a 2023 Section 3.	Workday displays the 2019 Form I-9 with a: • Completed Section 1 and 2. • Completed 2023 Section 3. • Link to the 2019 Form I-9.
Record of External Form I-9	2017	Workday displays the 2017 Form I-9 with a blank Section 1 and Section 2. You can complete a Section 3 reverification.	Workday displays the 2017 Form I-9 with a: • Blank Section 1 and Section 2. • Completed Section 3. • Link to the Record of External Form I-9.
Record of External Form I-9	2019	Workday displays the 2019 Form I-9 with a blank Section 1 and Section 2. You can complete a Section 3 reverification.	Workday displays the 2019 Form I-9 with a: • Blank Section 1 and Section 2. • Completed Section 3. • Link to the Record of

Form I-9 Revision	Form I-9 Section 3 Revision Year	Complete Form I-9 Section 3 Task	View Form I-9 for Worker Task
			External Form I-9.
Record of External Form I-9	2023	Workday displays the 2023 Form I-9 with a blank Section 1 and Section 2. You can complete a Section 3 reverification.	Workday displays the 2023 Form I-9 with a: • Blank Section 1 and Section 2. • Completed Section 3. • Link to the Record of External Form I-9.

Related Information

Tasks

Steps: Set Up Electronic Form I-9 on page 759
Steps: Manage Electronic Form I-9 on page 766

Concept: Electronic Form I-9 Workflow

An employee can complete an electronic Form I-9 when the:

- Employee has no other *Complete Form I-9* events in progress.
- Hire process is complete.
- Position is based in the U.S.

The electronic Form I-9 includes fields that don't display on the printed Form I-9 to:

- Enable *E-Verify* integration.
- Progress the Form I-9 through Workday business processes.

The electronic Form I-9 displays the same information as the paper form and provides a link to the full Form I-9 instructions at the U.S. Citizenship and Immigration Services (USCIS) website.

Employees can access the self-service task to initiate the *Complete Form I-9* business process. Regardless of how the Form I-9 initiates, employees electronically sign the Form I-9.

Section 1. Employee Information and Attestation

- The employee fills out the form, provides any required or optional data, and selects the appropriate check boxes.
- When you want the date of birth and SSN data from the Complete Form I-9 task to override the employee's profile information, you can select the Override employee profile Date of Birth and SSN with Form I-9 data check box on the Maintain Form I-9 Settings task. When the employee submits the Form I-9, Workday overrides the SSN and date of birth from the Form I-9 to replace the SSN and date of birth on their HR record.

  Note: Selecting this check box doesn't send notifications or acknowledgments of this change.
- When you rescind the *Complete Form I-9* business process, these processes are also rescinded.

Preparer and/or Translator Certification

Employees can add up to 5 preparers or translators.

Employers:

- Can't add preparers or translators in Section 2.
- Can send back the Form I-9 to the employee to add or remove preparers or translators.

Section 2. Employer or Authorized Representative Review and Verification

- Enter documents from List A, or List B and List C, then provide the necessary document details.

  Workday filters the selection lists in prompts for Lists A, B, and C based on the citizenship or immigration status the employee selects and provides a validation to ensure accurate data entry.
- When the employee provides a Social Security card as a List C document, you must enter the number in List C manually.
- When Workday selects the issuing authority that corresponds to a document, you can override this value.
- You can send the form back to the employee to enter missing data or make corrections.
- Select the I Agree check box, which serves as an electronic signature.
- You can configure Workday to populate the employer name, title, organization, and address in this section. Workday adds the current date stamp before you approve the form.
- If necessary, you can select an Overdue Reason.

(Optional) E-Verify Integration

- You can configure Workday to send the employee Form I-9 data to E-Verify automatically.
- When the original Form I-9 has questionable data, E-Verify requests reverification. Workday displays customized instructions on the *Form I-9 Data Verification* event indicating which items are in question. You can correct supporting document information, but corrections to Section 1 must come from the employee.
- You can configure Workday to:
  - View cases created for an employee in the last 365 days. You can close a duplicate case before creating a new one at E-Verify.
  - Sync updated case statuses from E-Verify on a recurring basis.
- Depending on the documents provided by the employee, E-Verify returns an employee photo for you to verify. E-Verify determines requirements for photo matching. If a photo is missing or doesn't match, you must upload images of your employee's document.
- E-Verify might request that you upload front and back images of a document without requiring you to confirm if the photo matches or is missing.
- Workday resubmits the information, and E-Verify returns the employment authorization status. When the authorization is:
  - Successful, Workday closes the E-Verify case and automatically completes the finalization step on the Workday business process.
  - Unsuccessful, Workday maintains the E-Verify case number so you can resolve the case manually on the E-Verify website. If you configure the integration to sync case statuses and you receive a *U.S. Employment Verification Status* from E-Verify, Workday automatically completes the *Final U.S. Employment Verification Status* step on the business process.
- If the E-Verify connection fails, Workday displays a status of *Awaiting E-Verify Submission*. You can click Retry to resubmit the information if you have permission on the *Process: Resubmit: Form I-9* domain. If the Form I-9 is overdue, you can enter an overdue reason before you retry the E-Verify submission.

Manual Entry of Final U.S. Employment Verification Status

- You can use the *Final U.S. Employment Authorization Status* step to enter employment eligibility details.
- When not using E-Verify, you can make an eligibility determination and enter it here.
- When E-Verify doesn't immediately return an authorization, Workday pauses the *Complete Form I-9* business process on this step. Workday also displays information from E-Verify so you can manually

progress the Form I-9 at the E-Verify website. After resolution is reached with E-Verify, you can record the eligibility status and any additional information here. You can then submit the *Complete Form I-9* business process.
- When you select a status of *Employment Not Authorized* or *Verification Not Determined*, Workday automatically rescinds the *Edit ID Information* business process and removes the SSN and Form I-9 List A, B, and C document IDs from the worker record.
- When you enter an incorrect eligibility status or E-Verify case number and no steps remain in the *Complete Form I-9* business process, you can change the status or case number using the Correct action on the business process.

Forms I-9 with Unsuccessful Verifications

When an employee's previous Form I-9 has a status of *Verification Not Determined* or *Employment Not Authorized*, you can relaunch the *Complete Form I-9* business process and create a new Form I-9.

Related Information

Tasks

Steps: Set Up Electronic Form I-9 on page 759

Reference

Reference: E-Verify Case Statuses on page 779

U.S. Citizenship and Immigration Services (USCIS)

Concept: Electronic Form I-9 and Retry Button Limitations

Electronic Form I-9

The electronic Form I-9 in Workday doesn't support:

- Completion of the form by federal contractors who are subject to the Federal Acquisition Regulation (FAR) E-Verify clause.
- Special Placement signatures for employees with disabilities.

According to the Federal Acquisition Regulation (FAR) E-Verify rule, federal contractors must complete E-Verify either:

- As part of their hire process.
- Upon assignment to a federal contract, if they're existing employees.

When you use the electronic Form I-9, you can only add the *Complete Form I-9* subprocess to the *Onboarding* business process.

When a Form I-9 reaches its retention period, you can only view the *Complete Form I-9* event when you select Worker History by Category > Personal Data.

E-Verify Integration Retry Button

When you use the Workday *E-Verify* integration, the Retry button is unavailable:

- On the Update Form I-9 Receipts task.
- When you have a read time-out.

If you have a read time-out, check for an open case on the E-Verify website. If there's no case, you can manually submit the information at E-Verify.

If you use Retry button to submit a case that requires a photo match or information confirmation, you can only progress the case on the E-Verify website.

Once you complete the case in E-Verify, you can record the *U.S. Employment Verification Status* and Final E-Verify Case Number in Workday.

Related Information

Tasks

Steps: Set Up Electronic Form I-9 on page 759

Concept: Purging Electronic Forms I-9

You can purge an electronic Form I-9 for a terminated worker after it meets the U.S. Citizenship and Immigration Services (USCIS) retention requirements.

Note: You can't reverse a purge. We recommend that you consult with your legal counsel before purging data.

There are 2 tasks you can use to purge electronic Forms I-9: Purge Person Data and Create Purge Plan.

You can use the Create Purge Plan task to create a purge plan. A purge plan consists of the privacy purge custom report you created, along with the data types you want to purge. You can determine if you want to include a purge plan when you access the Purge Person Data task.

Task	Result
Purge Person Data with a purge plan	You can purge a terminated employee's Form I-9, but not their personal data. Workday doesn't purge their Forms I-9 if the forms haven't met the retention requirements.
Purge Person Data without a purge plan	You can purge a terminated employee's Form I-9 and their personal data. When you purge a terminated employee, Workday either: • Permanently removes all personal data and their Forms I-9. • Permanently removes all personal data, but Forms I-9 remain viewable if they haven't met the USCIS retention requirements. You can later purge the Form I-9 data for a purged terminated employee, after it meets USCIS retention requirements.

Related Information

Concepts

Concept: Purging Person Privacy Data

Tasks

Steps: Purge Person Privacy Data

Steps: Schedule Privacy Purge Operations

Reference: Printing Electronic Forms I-9

On the Form I-9 Attachments section of the Maintain Form I-9 Settings task, you can select *Always Print Form I-9 Attachments* or *Ask Before Printing Form I-9 Attachments* to print Forms I-9 with attachments. You can view and print Forms I-9 with attachments with these tasks and reports:

Domain	Task
• *Print: I-9 for Workers* • *Print: I-9 Self Service*	Print Form I-9
• *Self-Service: I-9 Forms* • *Worker Data: I-9 Forms*	Print Form I-9 for Workers

Domain	Report
Worker Data: I-9 Forms	Mass Print Form I-9 for Workers
Audit: I-9 Forms	View Form I-9 for Worker

For the Mass Print Form I-9 for Workers report, you can filter the report by selecting the True check box on the Worker has Form I-9 facet. When you print your selected forms, Workday:

- Consolidates them according to language and revision number.
- Delivers them as PDFs to My Reports.

Reference: E-Verify Case Statuses

If you use the Workday *E-Verify* integration, you might receive these case statuses after you submit Forms I-9 for your employees:

Case Status	Description
MANUAL_REVIEW	The case requires a manual review by the Department of Homeland Security (DHS). When you receive this status, access the E-Verify website to view the results of the manual review and progress the case. You need to bring the final status back into Workday to complete it.
PENDING_REFERRAL	The case receives a Tentative Nonconfirmation (TNC). When you receive this status, access the E-Verify website to refer the TNC to DHS, Social Security Administration (SSA), or both, to complete the case. You need to bring the final status back into Workday to complete it.
QUEUED	E-Verify is processing the case. Access the E-Verify website to view the updated case status and progress the case. You need to bring the final case status into Workday to complete it.
REFERRED	The case is a referral. You need to bring the final status back into Workday to complete it.
SCAN_AND_UPLOAD	Upload images of the front and back of the employee's photo document.
UNCONFIRMED_DATA	Some case information is potentially incorrect. Review and update the identified fields.

You can automate updating case statuses and the closure of the *Final U.S. Employment Verification Status* step in Workday if you configure the:

- *E-Verify Company* attribute on the *E-Verify - Employment Verification* integration template. Ensure that the company is valid and includes any workers with possible new or updated Forms I-9.
- *SyncCaseStatus* option on the Launch/Schedule integration task.

The automation eliminates the need to access the E-Verify website to bring the final case status into Workday manually to complete it.

Related Information

Concepts

Concept: Electronic Form I-9 Workflow on page 775

Tasks

Steps: Set Up Electronic Form I-9 on page 759

FAQ: Electronic Form I-9

- Is the Social Security Number (SSN) optional?
- Does the Form I-9 in Workday meet USCIS guidelines?
- Can I attach identification documents to the Form I-9 in Workday?
- Why can't I see documents that I attached on a Form I-9?
- Can I delete Form I-9 data from Workday?
- How do I know if an employee needs to complete a new Form I-9 when adding or changing jobs?
- Can I correct a worker's U.S. Employment Verification Status after submission?

Is the Social Security Number (SSN) optional?	If an employer participates in E-Verify, employees must provide the SSN. It is the decision of your company to make the SSN required. If you participate in E-Verify, Workday recommends that you add a validation condition to the *Complete Form I-9* business process. The validation ensures that the U.S. Social Security Number field isn't blank when the employee submits their information. For more information, see U.S. Citizenship and Immigration Services.
Does the Form I-9 in Workday meet USCIS guidelines?	Yes. The electronic Form I-9 satisfies United States Citizenship and Immigration Services (USCIS) requirements. Workday continues to track the USCIS guidance published in the Handbook for Employers (M-274). Note: Confirm your Form I-9 compliance requirements and processes before enabling electronic Form I-9 business processes. Workday enables you to create a technically compliant Form I-9 and adheres to legal requirements for an electronic Form I-9. However, your organization is ultimately responsible for its Form I-9 compliance.
Can I attach identification documents to the Form I-9 in Workday?	Yes, you can attach documents to: • Section 2 of the Form I-9 until you submit it. • The *Complete Form I-9 Section 3* business process. You can use the *Amend Form I-9* business process to add or delete any attachments to the Form I-9. When you add or delete attachments through the *Amend Form I-9* business process, the Form I-9 Amended Data table indicates that a change occurred. It doesn't record specific details. If you want to record additional information, Workday recommends that you enter it in the Reason for Change field.

Why can't I see documents that I attached on a Form I-9?	To view Form I-9 attachments, you must be secured to the *Worker Data: Form I-9 Attachments* domain. You can enable workers to view attachments on their Form I-9 by securing them on the *Self-Service: Form I-9 Attachment in View* domain.
Can I delete Form I-9 data from Workday?	Workday doesn't delete Form I-9 data. Workday provides access to electronic Forms I-9 for all current, active employees. For terminated employees, we keep Forms I-9 for either: • 3 years after the hire date when the employee works less than 3 years. • 1 year after the termination date when the employee works more than 3 years. Once a Form I-9 for a terminated employee exceeds this period, the form is inactive, but you can search for or view inactive forms in Workday. Once a Form I-9 reaches its retention, you can purge the Form I-9 data from Workday.
How do I know if an employee needs to complete a new Form I-9 when adding or changing jobs?	Workday delivers a condition rule on the *Complete Form I-9* step of the *Onboarding* business process that checks if an employee: • Has their primary job located in the United States or U.S. territories. • Doesn't have an in-progress or completed Form I-9. Employees who meet these conditions receive the Complete Form I-9 task when *Onboarding* is a subprocess for these business processes: • *Add Additional Job*. • *Change Job*.
Can I correct a U.S. Employment Verification Status for a worker after submission?	Yes. You can only correct the U.S. Employment Verification Status when no steps are left in the *Complete Form I-9* business process. You must have permission on the *Correct* action on the *Complete Form I-9* business process security policy.

Related Information

Concepts

Concept: Electronic Form I-9 Workflow on page 775

Concept: Purging Electronic Forms I-9 on page 778

Tasks

Steps: Set Up Electronic Form I-9 on page 759

Steps: Manage Electronic Form I-9 on page 766

Form I-9 for Remote Hire

Setup Considerations: Form I-9 for Remote Hire

You can use this topic to help make decisions when planning your configuration and use of Forms I-9 for remote hire. It explains:

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

Refer to detailed task instructions for full configuration details.

What It Is

With Form I-9 for Remote Hire, you can enable remote employees to designate an external authorized representative to complete Section 2 of the Form I-9, streamlining the remote hiring process.

Business Benefits

- Greater flexibility managing and completing Forms I-9 for remote employees.
- Employees can designate an external authorized representative to complete Section 2 of the Form I-9.

Use Cases

- HR partners or administrators can configure the remote hire process to determine who can specify an external authorized representative to complete Section 2 of the Form I-9.
- Employees can specify who will be their external authorized representative.

Questions to Consider

Questions	Considerations
Do you need separate *Complete Form I-9* business processes for remote and in-person employees? What if you use the *E-Verify* integration?	When you use the *E-Verify* integration, determine whether you want to create a single *Complete Form I-9* business process for in-person and remote employees. You'll also need to use condition rules to differentiate between the 2 groups of employees. If you use E-Verify, you'll need to have condition rules to determine if a Form I-9 requires data verification for E-Verify. You can also create 2 separate business processes: One for remote employees and 1 for in-person employees. Your business process for remote employees will also need to use condition rules to determine if a Form I-9 requires data verification for E-Verify.
Who do you want to help guide the remote hiring process?	Workday enables you to determine the external authorized representative relationships that employees can select to complete Section 2 of the Form I-9. Authorized representatives must be external to your organization. Example: Family member, friend, notary. You can also determine a role, such as an HR partner, who can review Section 1 and Section 2 of the Form I-9. This person can edit the external authorized representative's information, send back the form for correction, resend the link, and submit the Form I-9.

Questions	Considerations
Who do you want to enable to select an external authorized representative to complete the Form I-9 for Remote Hire?	You can select the HR Roles Select Authorized Representative check box on the Maintain Form I-9 Settings task to enable HR roles to designate an external authorized representative who can complete Section 2 of Form I-9. Settings apply to all your Remote Forms I-9: • If you select the check box, HR roles can designate external authorized representatitves. • If you clear the check box, Workday automatically enables employees to designate their own external authorized representative.

Recommendations

When you use the *E-Verify* integration, create a condition rule on your *Complete Form I-9* business process that uses the E-Verify Event Created by report field. The condition rule determines if the Form I-9 requires data verification for E-Verify.

Requirements

No impact.

Limitations

You can only configure the relationship options the employee can select to designate their external authorized representative. When you want employees to use a specific person to complete the employee's Section 2, you can provide that person's information. The employee can enter that person's information when they designate their external authorized representative.

Tenant

No impact.

Security

Domain	Considerations
Process: Remote Form I-9 in the Onboarding functional area.	Provides users access to tasks related to completing a Form I-9 for remote hire.
Purge Person Data in the System functional area.	Provides access to tasks that enable you to purge Form I-9 data and the authorized representative's information.
Set Up: Configure Optional Fields in the System functional area.	Provides access to hide or require select fields on the Form I-9 for remote hire.
Set Up: System in the System functional area.	Secures the task that enables you to create the email template used for the email sent to the external authorized representative.
Set Up: Tenant Setup - BP and Notifications in the System functional area.	Secures the notification settings for email sent to the external authorized representative.

Domain	Considerations
Set Up: Tenant Setup - HCM in the System functional area.	Secures tasks that enable you to configure external authorized representative relationships, email notification text, attestation text, and the Section 2 business name and address.
Worker Data: I-9 Forms in the Onboarding functional area.	Provides access to report fields you can use in custom reports.

Business Processes

You can configure the *Manage Remote Form I-9* shared participation step on the *Complete Form I-9* business process. If you use multiple *Manage Remote Form I-9* and *Review Form I-9* steps, the steps must come before your completion step.

Reporting

No impact.

Integrations

The *E-Verify* integration enables you to:

- Submit Form I-9 data to the E-Verify service for employment eligibility verification.
- Receive results for employment eligibility verification, including photos. Department of Homeland Security (DHS) and Social Security Administration (SSA) databases provide some of these results.

Connections and Touchpoints

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.

Steps: Set Up Electronic Form I-9 for Remote Hire

Context

You can configure Workday so that remote employees can create an electronic Form I-9 to verify U.S. employment eligibility. You can enable remote hires to designate an external authorized representative to complete Section 2 of the Form I-9, streamlining the remote hiring process.

Note: Workday enables you to create a Form I-9, but doesn't assume responsibility for compliance.

Steps

1. Edit Domain Security Policies.

   Configure security for the *Process: Remote Form I-9* domain in the Onboarding functional area. Workday recommends that you grant the Employee as Self security group View and Modify permissions.
2. Edit Business Process Security Policies.

   Configure the *Complete Form I-9* business process security policy in the Onboarding functional area.
3. Edit Business Processes.

   Configure the *Complete Form I-9* business process in the Onboarding functional area.
   a) Add the *Manage Remote Form I-9* shared participation step.

      When you have multiple *Manage Remote Form I-9* or *Review Form I-9* steps, you must set the last step as the completion step.
4. Activate Pending Security Policy Changes.

5. Maintain Form I-9 Settings on page 768.

   Configure these sections:

   - Authorized Representative Relationships for Remote Employees
   - Remote Form I-9 Attestation Text
   - Remote Form I-9 Attachment Instructions
   - Remote Form I-9 Email Notification Text
   - Remote Form I-9 Section 2 Business Name and Address
6. Access the Edit Tenant Setup - Notifications task.

   On the HCM tab in the Notification Delivery Settings section, access the *Remote Form I-9 Authorized Representative Notification* notification type.

   Select the Override Parent Notification Type Settings check box.

   Create a notification routing rule that uses:

   - *Email* as the notification channel.
   - *Immediately* as the default frequency.

   See Reference: Edit Tenant Setup - Notifications.
7. Create Email Templates.

   Select the *Remote Form I-9 Authorized Representative Email Template Behaviour* option.
8. (Optional) Hide or Require Optional Fields.

   In the By Functional Area prompt, select Onboarding → Remote Form I-9.

   Consider the criteria that you want for these fields:

   - Authorized Representative Government ID
   - External Site Link
   - Section 2 Attachments

Related Information

Reference

2021R2 What's New Post: Form I-9 for Remote Hire

2021R2 What's New Post: Form I-9 for Remote Hire - Business Process

2021R2 What's New Post: Form I-9 for Remote Hire - External Site

Example: Set Up Complete Form I-9 Business Process for Remote Hire

This example illustrates 1 way to configure the *Complete Form I-9* business process when you use the *E-Verify* integration and want a single business process for your in-person and remote employees.

Context

Your company is located in Chicago and supports both in-person employees and remote employees. You don't want to create multiple *Complete Form I-9* business processes for each group of employees. Your company also uses the *E-Verify* integration, so you want to ensure that Workday routes the employees' Form I-9 to E-Verify properly.

You decide that in order to distinguish between your in-person and remote employees, you'll create condition rules based on location. You also decide to add condition rules to determine if a Form I-9 requires an *E-Verify Data Verification*.

Prerequisites

Security: These domains in the System functional area:

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

Steps

1. Access the *Complete Form I-9* business process in the Onboarding functional area.
2. Use this business process step order:

Order	Type	Specify	Group
a	Initiation		
b	Action	Review Form I-9	HR Partner
b	Shared Participation	Manage Remote Form I-9	HR Partner
b	Action	Review Form I-9	HR Partner
c	Service	E-Verify Initial or Reverification	
d	Action	E-Verify Duplicate Case Check	HR Partner
e	Service	E-Verify Close Duplicate and Create New Case	
f	Action	E-Verify Photo Match	HR Partner
g	Service	E-Verify Confirm Photo	
h	Service	Create New I-9 Event for E-Verify Reverification	
i	Service	Final U.S. Employment Verification Status	HR Partner

3. As a related action off of the first *Review Form I-9* action step, select Business Process → Create Condition Rule.

   Enter these values:

Description	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
In-Person Location	Location - Proposed	in the selection list	Value specified in this filter	Chicago

4. As a related action off of the *Manage Remote Form I-9* shared participation step, select Business Process → Create Condition Rule.

   Enter these values:

Description	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
Remote Location	Location - Proposed	not in the selection list	Value specified in this filter	Chicago

Description	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
Not E-Verify Data Verification	E-Verify Event Created by	is empty		

5. As a related action off of the *Review Form I-9* action step associated with the *Manage Remote Form I-9* step, select Business Process → Create Condition Rule.

   Enter these values:

Description	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
Remote Location	Location - Proposed	not in the selection list	Value specified in this filter	Chicago
E-Verify Data Verification	E-Verify Event Created by	is not empty		

Related Information

Reference

2021R2 What's New Post: Form I-9 for Remote Hire - Business Process

Record of External Form I-9

Setup Considerations: Record of External Form I-9

You can use this topic to help make decisions when planning your configuration and use of records of external Form I-9. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirement 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 import critical data and attachments from Forms I-9 created outside of Workday, creating a record of external Form I-9. You can use these records to view important data, making it easier to meet compliance goals. Records of external Form I-9 always have a U.S. Employment Verification status of *External Record*.

Business Benefits

- Upload paper Forms I-9 and Forms I-9 from legacy systems into Workday, providing greater visibility of data.
- Flexibility in entering and uploading external Form I-9 data through tasks or web services.

Use Cases

You have Forms I-9 from these sources and need to transfer the data into Workday:

- Paper.
- Legacy systems.

Questions to Consider

Question	Considerations
Is it preferable to use the tasks or web services to import data from Forms I-9 created outside of Workday?	It depends on the quantity of Forms I-9 you have. Web services are more suitable for inputting data in bulk, whereas the tasks are more suitable for smaller quantities.

Recommendations

No impact.

Requirements

You need to configure these initiating actions on these business process security policies:

- *Complete Record of External Form I-9* on the *Complete Form I-9* business process.
- *Complete Record of External Form I-9 Section 3* on the *Complete Form I-9 Section 3* business process.

Limitations

You can't amend records of external Form I-9, but you can correct these events:

- *Complete Form I-9 - External Record*
- *Complete Form I-9 Section 3 - External Record*

Tenant

No impact.

Security

These domains in the Onboarding functional area:

Domain	Considerations
Audit: I-9 Forms	Provides access to these reports: • Form I-9 Audit Trail • U.S. Employees with Form I-9 Expiring Documents
Worker Data: I-9 Forms	Provides access to the View U.S. Employment Verification Status report.

Business Processes

These business processes in the Onboarding functional area:

Business Process	Considerations
Complete Form I-9 in the Onboarding functional area.	Secures a task that enables you to enter critical Section 1 and Section 2 information manually from Forms I-9 created outside of Workday.
Complete Form I-9 Section 3 in the Personal Data functional area.	Secures a task that enables you to enter critical Section 3 information manually from Forms I-9 created outside of Workday.

Reporting

Records of external Form I-9 display in reports such as:

Report	Considerations
Form I-9 Audit Trail	View the audit trail of Form I-9 business processes for 1 or more organizations, locations, establishments, or workers. Details include the business process initiation date, initiator, and status of individual business processes.
U.S. Employees with Expiring Form I-9 Documents	View U.S. employees with expiring Section 2 and Section 3 documents that require renewal.
View U.S. Employment Verification Status	View the employment verification status of employees.

Integrations

Web Service	Considerations
Correct Record of External Form I-9	Enables you to correct a record of external Form I-9. To add an attachment using the web services for correcting information, you must use a partial data sync. To replace or delete attachments, you must use a full data sync.
Correct Record of External Form I-9 Section 3	Enables you to correct a record of external Form I-9 Section 3. To add an attachment using the web services for correcting information, you must use a partial data sync. To replace or delete attachments, you must use a full data sync.
Get External Form I-9	Retrieves the records of external Form I-9.
Get External Form I-9 Section 3	Retrieves the records of external Form I-9 Section 3.
Get External Form I-9 Source	Retrieves the source of the records of external Form I-9.
Put External Form I-9	Creates or updates the record of external Form I-9.
Put External Form I-9 Section 3	Creates or updates the record of external Form I-9 Section 3.
Put External Form I-9 Source	Creates or updates the source of the record of external Form I-9.

Connections and Touchpoints

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.

Steps: Set Up Record of External Form I-9

Context

You can import critical data and attachments from Forms I-9 created outside of Workday, creating a record of external Form I-9. You can use these records to view important data, making it easier to meet compliance goals.

Steps

1. Edit Business Process Security Policies.

   Configure these initiating actions:

   - *Complete Record of External Form I-9* on the *Complete Form I-9* business process in the Onboarding functional area.
   - *Complete Record of External Form I-9 Section 3* on the *Complete Form I-9 Section 3* business process in the Personal Data functional area.
2. Edit Business Processes.

   Configure these business processes:

   - *Complete Form I-9* in the Onboarding functional area.
   - *Complete Form I-9 Section 3* in the Personal Data functional area.
3. (Optional) Access the Complete Record of External Form I-9 task.

   Complete a record of external Form I-9 for an employee.
4. (Optional) Access the Complete Record of External Form I-9 Section 3 task.

   Complete a record of external Form I-9 Section 3 for an employee.

Background Checks

Steps: Set Up Background Checks for Pre-Hires and Workers

Context

You can track background checks in 2 ways:

- At an overall pass or fail level, for the background check.
- At an overall pass or fail level, and the individual test level in the background check packages.

To track a background check at the individual test level, you must use the *Core Connector: Background Check Inbound* integration.

Background checks can be for:

- Pre-hires who undergo pre-employment screening or whose employment offers or contracts are contingent on passing a background check.
- New hires who start work before their background checks complete.
- Workers who are subject to periodic background checks.
- Contingent workers who are converting to full-time employees.

Depending on your requirements, you can submit status changes for approval by using the *Background Check* process as a stand-alone business process. You can use the *Background Check* process as a stand-alone business process when there's no active background check package.

You can also use the *Background Check* process as a subprocess for the *Hire* business process. Alternatively, you can update the background check status for pre-hires by using the related actions menu.

After a pre-hire becomes a worker, you can only update the status on the worker record.

Steps

1. Edit Domain Security Policies.

   Define the security policies for these domains:

   - *Pre-Hire Data: Background Check Status* in the Pre-Hire Process functional area.
   - *Worker Data: Background Check Status* in the Personal Data functional area.
2. Edit Business Process Security Policies.

   Configure the *Background Check* business process and security policy in the Personal Data functional area.
3. (Optional) Set up the integration with your third-party vendor using the *Core Connector: Background Check Order* integration.

   See Steps: Set Up Core Connector: Background Check Order Integrations.
4. Access the Maintain Background Check Statuses task.

   Restrict usage of your statuses by mapping them to Workday-delivered statuses.

   Security: *Set Up: Background Checks* domain in the Pre-Hire Process functional area.
5. (Optional) Access the Maintain Background Check Packages task.

   You can track specific background check packages and the tests that make up the packages.

   Security:

   - *Set Up: Background Checks* domain in the Pre-Hire Process functional area.
   - *Set Up: Recruiting* domain in the Recruiting and Talent Pipeline functional areas.

Result

You can manage background check statuses from these related actions:

- For pre-hires, select Recruiting > Change Background Check Status.
- For workers, select Personal Data > Change Background Check Status.

If you create background check packages, access background checks from the Select Background Check Package task or these related actions:

- For pre-hires, select Recruiting > Start Background Check.
- For workers, select Personal Data > Start Background Check.

The Status Date normally populates with the current date. If you initiate the background check from the *Hire* business process, it populates with the hire date. If the hire date is in the future, it populates with the future date. Corrections to the hire date don't change the status date.

Next Steps

- View the status change history from the:
  - Related actions menu of a pre-hire or worker.
  - Personal profile group on worker profiles.
- Use the Hire Employee or Maintain Worker Documents task to attach background check documentation.
- Use the Pre-Hire Background Check Status Summary report to view the total pre-hires with statuses updated within the last 90 days. This report includes both individual pre-hires, and pre-hires with in-progress or completed hire events.

  Note: Assigning an unconstrained, role-based security group to the *Pre-Hire Data: Background Check Status* domain provides access to pre-hire information, but limits the visibility of employee data.
- Use the Worker Background Check Status Summary report to view the employees and contingent workers with statuses updated within the last 90 days. This report includes in-progress and

completed status changes from *Background Check* events that are stand-alone processes or part of hire events. Drill down to see employee and event details.
- You can customize these reports and change the date range, group workers by different criteria, or limit specific statuses.

Related Information

Tasks

Hire Employees on page 690

Maintain Worker Documents on page 106

Steps: Set Up Pre-Hire Tracking on page 624

Create Role-Based Security Groups

Change Job

Legacy Change Job

Setup Considerations: Job Changes

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

You can use this topic to help make decisions when planning your configuration and use of the *Change Job* business process. 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 set up job change workflows by configuring and combining tasks and business processes. Example: Transferring a worker initiates a change in benefits and requires the approval of an HR administrator.

The main process to consider is the *Change Job* business process, which controls most job changes between a worker's *Hire* and *Termination* events, including:

- Demotions.
- Job data changes.
- Lateral moves.
- Location changes.
- Promotions.
- Transfers between managers and organizations.

You can enable the *Change Job* business process to use machine learning to provide recommendations for common fields when a user is completing a job change.

Business Benefits

Change Job is intuitive and configurable, enabling you to:

- Minimize manual error.
- Limit the training required for users to perform job changes.

- Configure related events as subprocesses.

You can modify the overall process to suit the needs of your organization. Example: Requiring specific tasks or skipping unnecessary fields based on the job change reason. You can also add a range of nonstaffing tasks as subprocesses that can display and route differently based on many factors, including:

- Who initiates
- How users initiate
- Location
- Organization or manager
- Reason
- Worker type

Once you set up the *Change Job* business process, Workday enables the appropriate users to access and complete the steps.

Use Cases

- Converting individual contributors into managers by assigning other workers to their supervisory organizations.
- Creating and managing internal job requisitions and applications.
- Initiating processes such as compensation changes, location changes, and onboarding new hires.
- Changing an employee's job to a domestic assignment.
- Moving managers or whole teams between organizations.
- Moving workers from 1 manager to another.

Questions to Consider

Question	Considerations
What does your ideal process look like for job changes?	Consider the current or planned job change processes for your organization. Decide what works and what you'd like to change. Plan your processes and changes before configuring them in Workday. Having a thorough understanding of your ideal workflow can help you make decisions regarding configuration.
Which of your organizations do job changes affect, and how do their requirements differ?	You can configure separate *Change Job* business process definitions for different organizations. Examples: • You can create a definition for U.S.-based workers and a separate definition for workers based in the UK. • You can create a definition for managers that includes the *Approval* step and a separate definition for HR Administrator roles that skips the *Approval* step. You can also use condition rules to modify the workflow for each definition. Rule-based definitions are more efficient for high-volume transactions than definitions with the same condition repeated for multiple steps. Example: You can create a rule-based definition that evaluates workers for full-time status, instead of

Question	Considerations
	creating multiple steps requiring workers to be full-time employees. You can also configure rule-based consolidated templates to enable initiators to complete some subprocesses during a job change based on condition rules.
What other steps do you want to include when you make job changes?	You can add tasks as steps on the *Change Job* business process, including: • Assign Pay Group • Onboarding • Propose Compensation Change Access the Business Process Configuration Options report to find a full list of tasks that you can add to initiate subprocesses on the *Change Job* business process.
How do you want to be able to initiate job changes?	Workday enables you to decide which roles can initiate and approve job changes and which roles those changes affect. Users with access can initiate job changes from: • Dashboards • Global search • REST API • Worker Profile
How far in the past do you want each role to be able to make job changes?	Retroactive job changes can affect other processes, including Staffing tasks, Payroll processes, and downstream integrations. You can configure a maximum date in the past to apply retroactive job changes. Example: You create a custom validation to ensure that managers can only make job changes up to a month in the past. However, you enable HR administrators to make job changes as far back as they need to.
What should your users be able to see and do when completing job changes?	You can create simplified job changes for initiators, reviewers, and approvers using the Maintain Change Job Templates task. These templates enable you to control what information is visible and editable when users access the *Start Job Change* initiation, review, and approval steps. You can also enable an enhanced user interface for templates to simplify the user experience. You can also configure a variety of tools to help people complete job changes, such as: • Custom help text on certain tasks. • Custom validation rules that ensure users enter data accurately.

Question	Considerations
	• Dynamically updating default values for certain fields based on changes users make to other fields • Embedded analytics worklets to display additional data. • Guided tours. • Quick tips.
Do you want to provide machine learning recommendations for users when they complete job changes?	You can opt in to share data categories with Workday. Once you opt in, it takes approximately 2 weeks for Workday to process your data and present recommendations. To use the most relevant data, we recommend that you enable this feature in your production tenant. The recommendations depend on the volume of your contributed data. We recommend that you have historical data before you use this feature.

Recommendations

- Create change job templates to help users complete job changes more efficiently. You can configure templates based on job change scenarios for your organization.
- We recommend that you plan for all possible job change scenarios. Consider what you want job changes to look like within your organization and what scenarios you want to prevent.
- The *Change Job* default definition includes all required steps in the correct order. Modify the default definition only as much as necessary to accomplish your business needs. Test often during configuration to reduce errors.
- Revisit your job change configurations whenever you implement new tools and business processes in Workday
- Create change job templates to help users complete job changes more efficiently.

Requirements

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.

You need to set up the *Change Job* business process to manage workers in Workday.

Limitations

We don't support translations for the Machine Learning Recommendations for Change Job feature.

Tenant Setup

You can specify what options automatically populate on a job change, including:

- Headcount options.
- Organizations for job management.

You can also specify whether you want to enable job overlap when assigning workers to positions.

You can view tenant setup options that impact *Change Job* in these sections of the Edit Tenant Setup - HCM task:

- Staffing
- Job Requisitions

- Leave of Absence

Security

The security domain policies for these events affect which security groups can access the related sections on the *Change Job* business process:

- *Change Job*
- *Change Organization Assignments*
- *Propose Compensation Change*

Anyone with access to the *Staffing Actions: Compensation for All Job Profiles* domain can view the compensation ranges of all job profiles.

The initiator's access to a Supervisory Organization determines the visibility of many Change Job fields. As a result, Workday might dynamically hide fields and sections from a user.

Note: The enhanced user interface doesn't apply domain security configurations for all Staffing Actions security domains except *Staffing Actions: Change Job Date and Reason*. Instead, the interface uses a combination of business process security policy, template configuration, and configuration of optional fields to determine the change job information displayed to a user.

Business Processes

Your job change setup can affect downstream events, such as the:

- *Assign Pay Group* business process.
- *Change Benefit Elections* business process.
- *Change Organization Assignments for Worker* business process.
- Maintain Employee Contract task.
- *Onboarding* business process.
- *Propose Compensation Change* business process.
- Third-party integrations.
- Job Profile

In-progress *Change Job* events can block a worker's processes from initiating or completing.

Some business processes initiate *Change Job* and might require specific business process definitions to function. Example: *Swap Positions*.

Reporting

Add the Change Job task to the My Team Management dashboard to help managers track and manage job changes and time-sensitive tasks for their teams.

Add the Start Job Change report to the worker profile to enable users to launch relevant job changes for a specific worker.

You can use the View Document Template Details report to view document templates created with Workday Docs.

Integrations

- You can use the `jobChanges` REST API to start and submit job changes. You can update worker information, such as:
    - Location.
    - Business Title.
    - Job Profile.
    - Position.
    - Job Classification.

Connections and Touchpoints

Change Job events can touch many other functional areas in Workday, including:

Features	Consideration
Benefits	
Compensation	
Onboarding	
Payroll	Job changes enable you to change a worker's information which can affect their payroll and benefits processing. Some examples of job changes that impact payroll include position, location, organization, and compensation changes.
Time Tracking	When you change the worker's position using the *Change Job* business process, Workday adds the new position to time blocks from the effective date of the change.
Recruiting	Recruiting transactions for internal candidates route to Change Job once the worker reaches the*Ready to Hire*phase.
Workday Docs	You can create document templates in Workday Docs to include on generate document steps for Change Job.

Example: When you transfer a worker to another country, the location change can affect their benefits, compensation, and onboarding information.

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.

Related Information

Concepts

Concept: Workday Docs

Tasks

Steps: Set Up Workday Docs

Reference

Improve the Change Job Experience for Managers

2024R1 What's New Post: Change Job Templates New User Experience for Consolidated Templates

2024R1 What's New Post: Change Job Templates New User Experience

Reference: Change Job Initiation on page 832

Steps: Set Up Job Changes

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Review setup considerations for the *Change Job* business process.

Context

Set up the *Change Job* business process to make staffing changes for employees and contingent workers, including:

- Contract changes.
- Demotions.
- Lateral job changes.
- Location changes.
- Promotions.
- Transfers.

Steps

1. Set Up Security for Job Changes on page 801.
2. Set Up Reasons for Job Changes on page 805.
3. (Optional) Access the Edit Tenant Setup - HCM task to configure these Staffing options:
    - Change Job Default Headcount Option
    - Change Job Use Default Organizations for Job Management
    - Change Job Default for Move Team with Manager
    - Enable Job Overlap for Vacating Positions
    - Automatically Select Is This Position Available for Overlap on Vacating Events
    - Enable Job Overlap on Position Restrictions
    - Allow Override of Restrictions on Staffing Events
4. Configure the *Change Job* business process in the Staffing functional area.

    For a list of allowed actions and approval options in *Change Job*, access the Business Process Configuration Options report.

    To ensure correct routing for the Request Transfer initiating action, include review steps for both the current and receiving manager.

    Assign a review step to an HR Partner or other role that has security access to all sections in the *Change Job* business process. This step ensures that someone reviews all job changes, including details which managers might not be able to view.

    See Steps: Configure Business Process Definitions.

5. (Optional) Access the View Business Process Template report.

   From the related actions of the Change Job business process type, select Business Process > Configure Consolidated Template to start tasks from configured subprocesses at the same time. Ensure that:

   - *Change Job* is first in the process order.
   - Each consolidated subprocess is an action step on the *Change Job* business process definition. Workday recommends you add these steps before the completion step.
   - *Propose Compensation Change* is last in the process order.
   - There's a review step for *Propose Compensation Change* in the *Change Job* business process definition to prevent unreviewed compensation changes.

   The approval step for the *Change Job* event includes all consolidated subprocesses. You receive all events on the template as 1 task in My Tasks. Consolidated templates might enable workers to see events that:

   - Aren't relevant to them.
   - Are only relevant for workers based in other locations.

   You can set up an additional *Consolidated Approval* step, for subprocesses not part of the consolidated template.

   Some action steps have Workday delivered condition rules. Example: You create an action step for *Change Superior Organization*. Workday applies the following condition rule: *Is Move Manager's Team selected or if it is a web service request, and if there are subordinate organizations to be moved.*

   Security: These domains in the System functional area:

   - Business Process Administration
   - Manage: Business Process Definitions
6. (Optional) Set Up Rule Based Consolidated Templates for Job Changes on page 807 .
7. (Optional) Set Up Change Job Templates on page 808.
8. (Optional) Steps: Set Up Defaults for Change Job Fields on page 803.
9. (Optional)Steps: Enable Machine Learning Recommendations for Change Job on page 817.
10. (Optional) Enable autocomplete on the *Change Job* business process definition.

    See Set Up Security to Autocomplete Staffing Events on page 523.
11. (Optional) Set up Workday Assistant for Staffing.

    You can initiate job changes through the Workday Assistant chatbot in:

    - Your Workday tenant.
    - Workday for Microsoft Teams.
    - Workday for Slack.

    See Steps: Set Up Workday Assistant for Staffing on page 524.
12. (Optional) Hide or Require Optional Fields.

    These functional areas are available for the *Change Job* business process:

    - *Change Job*.
    - *Change Organization Assignments for Worker (Enhanced User Interface Subprocesses only)*.

    Workday only requires or hides the field if your template configuration includes the field. Example: You require the Employee Type field. Your change job template configuration hides the Administrative Details section. The initiator doesn't see the Employee Type field, because that section is hidden.

    If you hide the Close the current position? field using the Configure Optional Fields task, it will still display in the enhanced user interface. To hide the field, you must remove the Opening section from the Sections to Display field on the Maintain Change Job Templates task.

13. (Optional) Create Custom Notifications.

    Set up email notifications to personal or work email addresses.

    You can override the email template. If you use Notification Designer, you can create a template and enable it for the *Custom Business Process* notification category. You can use the notification template to send notifications when using the *Change Job* business process.
14. (Optional) Maintain Localization Settings on page 144.

    These fields use the proposed location instead of the current location for any staffing transaction:

    - Additional Job Classifications
    - Work Shift
    - Work Space
15. (Optional) Create Help Text for Change Job on page 820.
16. (Optional) Set up countries tracking working time.

    See Steps: Set Up Working Time Localized Fields on page 550.
17. (Optional) Add Worklets to Business Processes.

    Configure embedded worklets to display when users complete a *Change Job* business process, including on subprocess steps.
18. (Optional) ../../../../financial-management/common-financial-components/custom-validations/kev1380041065601.dita.

    When a user triggers a custom validation or alert on a Change Job template with the Enable Enhanced UI for this Template check box selected, Workday jumps to the first page of the template so that the user can address the issue.
19. (Optional) Edit the Supervisory Organization field on these tasks so that you can select the correct supervisory organization when transferring workers to a new manager:

    - Review Change Job
    - Review: Receiving Manager

    Workday limits the permissions of this field when the review step is routed to the current manager. Supervisory organization options are restricted to those that the manager has access to, but are not limited to subordinates. This restriction doesn't apply to the Review: Current Manager task, as doing so would disrupt the request transfer flow and make the supervisory organization non-editable.

Result

View job changes on worker profiles and in Workday standard reports.

- Job changes display the reason type in a worker's history.
- Staffing reports filter *Change Job* events by the reason type.

Next Steps

You can cancel, rescind, or correct *Change Job* events. To make out-of-order corrections, use the *Edit Position* business process.

The access that the initiator has to a Supervisory Organization determines the visibility of many *Change Job* fields. As a result, Workday might dynamically hide fields and sections from the initiator.

Managers can initiate job changes across Workday. They can track the progress of job changes using the My Team Management dashboard.

Related Information

Concepts

Setup Considerations: Job Changes on page 792
Setup Considerations: Autocomplete Staffing Events on page 519
Setup Considerations: International and Domestic Assignments on page 893

Tasks

Steps: Set Up International and Domestic Assignments on page 897

Reference

Improve the Change Job Experience for Managers

https://community.workday.com/articles/1177294

Reference: Edit Tenant Setup - Assistant

2024R1 What's New Post: Change Job Templates New User Experience for Consolidated Templates

2024R1 What's New Post: Change Job Templates New User Experience

Reference: Change Job Initiation on page 832

Set Up Security for Job Changes

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Security: *Business Process Administration* or *Manage: Business Process Definitions*, and *Security Configuration* domains in the System functional area.

Context

Set up security to give managers and administrators access to the *Change Job* business process and each of its content areas.

- The business process security policy specifies who can start or complete actions in the *Change Job* business process.
- Domain security policies give you field-level control over who can view or modify data in each content area.

Steps

1. Enable these domain security policies:

Option	Description
Staffing functional area	*Staffing Actions* *Staffing Organizations* (for consolidated templates)
Advanced Compensation functional area (for consolidated templates)	*Add Compensation Management Plans* *Change Compensation Management Plans*

2. Access the View Business Process Template report.
3. Select the *Change Job* business process type.
4. Edit the business process security policy:
   a) Under Attachment Settings, define attachments security to restrict who can add, edit, and view attachments in business process events.
   b) Select Business Process Policy > Edit from the related actions menu of the business process type.
   c) Under Who Can Start the Business Process, select the security groups you want to grant access to for each initiating action.
   Since the *Change Job* business process has multiple initiating actions, you can limit the types of job changes available to different roles. Example: You can restrict access to the Change

Contingent Worker Details task, but provide broader access to the Change Location and Request Transfer tasks.

To hide tasks that aren't relevant, leave the security groups empty.

d) Under Who Can Do Action Steps in the Business Process, select the security groups you want to be able to complete review steps in the business process.

Ensure that you grant permissions to the same groups that you assigned to the review steps in the business process definition.

e) Under Who Can Do Actions on Entire Business Process, grant permissions to the *HR Partner*, *HR Administrator*, or other relevant HR role in your organization.

To ensure that business process validations run, you must also grant *View All* permission to the roles that can initiate the business process.

f) Select OK, then Done to return to the View Business Process Template report.

5. On the Section Groups tab, review the template sections and their task dependencies to decide which roles need access to each section.
6. Select the Task Security tab to grant security permissions on each domain:

a) Select Domain > Edit Security Policy Permissions from the related actions menu of a domain.

b) Grant access to the domain by selecting security groups and specifying whether they have permission to view or modify data.

To prevent problems caused by incomplete data, grant permissions on domains that contain required fields:

Staffing Actions: Administrator

Staffing Actions: Change Job Date and Reason

Staffing Actions: Job Profile

Staffing Actions: Location

Staffing Actions: Select or Create Position (for position management organizations)

Staffing Actions: Move Manager's Team (for job changes that move a manager to a different organization)

Staffing Organizations: Grant, Fund, Program, Gift (for required costing organizations)

Note: Your domain security policy configuration for the Staffing Actions domains doesn’t apply to Change Job templates that use the enhanced user interface.

c) Select OK, then Done to return to the View Business Process Template report.

7. (Optional) If you consolidated *Change Job* with *Assign Employee Collective Agreement*, *Change Organization Assignments for Worker*, and *Propose Compensation Change*, set up security for these processes.

To retain a simplified workflow, Workday doesn't display the Compensation section to role-based security groups for these initiating actions:

- Change Contingent Worker Details
- Change Location
- Request Transfer

If you're consolidating *Change Job* with *Assign Employee Collective Agreement*, ensure that you also grant security permissions to the *Worker Data: Collective Agreements* domain.

8. Access the Activate Pending Security Policy Changes task to confirm your changes.

Example

The table lists the recommended security domains for managers:

Domain	Secures These Actions
Staffing Actions: Change Job Date and Reason	Effective date, reason, proposed manager, proposed organization, headcount options
Staffing Actions: Select or Create Position	Existing or new position (for position management organizations)
Staffing Actions: Job Profile	Job profile, job title
Staffing Actions: Business Title	Business title
Staffing Actions: Location	Location, scheduled hours, work hours profile, work shift, work space
Staffing Actions: Contract Details	Purchase order, supplier, contract end date, pay rate, currency, frequency, assignment details
Staffing Actions: Attachments	Document link, category, comment
Staffing Organizations: Cost Center	Cost center
Staffing Organizations: Move Manager's Team	Move team or keep team in current organization

Next Steps

Access the Template-Driven Business Process Security report to confirm that the *Change Job* business process and domain security permissions are aligned.

Related Information

Concepts

Concept: Business Process Templates

Tasks

Activate Pending Security Policy Changes

Steps: Change Organization Assignments for Worker on page 912

Steps: Propose Compensation for Employees or Positions on page 1032

Steps: Set Up Job Changes on page 798

Steps: Manage Collective Agreements on page 647

Steps: Set Up Defaults for Change Job Fields

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Configure the *Change Job* business process and security policy in the Staffing functional area.

Security: *Set Up: Staffing* domain in the Staffing functional area.

Context

You can set up defaulting for these fields on the *Change Job* business process:

- Business Title
- Job Title
- Time Type
- Work Shift

Based on your configuration, the defaults in the fields will update as the user edits other fields in the business process.

You can use these web services to load and retrieve the data in bulk:

- *Get Staffing Field Defaults*
- *Put Staffing Field Defaults*
- *Get Staffing Field Defaults Condition Rules*
- *Put Staffing Field Defaults Condition Rules*

Steps

1. Access the Create Change Job (All) Defaults Condition Rule task.

   Create a set of condition rules that you can use to determine when to populate a specific change job field.

   Example: You want to default the Job Title field based on what the user enters in the Job Profile field. You create a condition rule using the *Job Profile - Proposed* field.
2. (Optional) Create Calculated Fields.

   Create custom fields to use in staffing field defaults. Select these values on the calculated field:

Field	Value
Business Object	*Change Job*
Authorized Usage	*Staffing Field Defaults - Change Job*
3. Access the Maintain Staffing Field Defaults task.
4. Select the Change Job (All) tab.

   Create a row for each field that you want to create defaulting rules for.
5. Access the Create Change Job (All) Defaults Condition Rule task from the Condition Rule prompt.

   Create a set of condition rules that determine when to populate a specific change job field.

   Example: You want to default the Job Title field based on what the user enters in the Job Profile field. You create a condition rule using the *Job Profile - Proposed* field.
6. Associate 1 or more condition rules for specific staffing fields in the business process and define the value that populates that field.

   As you complete this task, consider:

   - Defaulting applies to all change job initiating actions, and the review and approval steps. Defaulting doesn't apply when you correct a *Change Job* event.
   - Workday processes rules in the order they display in the grid. Once a field meets the conditions for a rule, Workday ignores any remaining rules for that field.
   - Users can override field defaults when completing the *Change Job* event.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
7. (Optional) Configure calculated fields in the Report Field.

   Note: You can't use calculated fields that contain sensitive data. Example: *Date of Birth*.

Result

During a *Change Job* event, Workday evaluates condition rules and applies defaults dynamically while users make changes to these fields:

- Employee Type
- Job Profile
- Location
- Position
- Scheduled Weekly Hours

Example

You want to default the Time Type field based on what the user enters in the Scheduled Weekly Hours field.

1. On the Maintain Staffing Field Defaults task, access the Change Job (All) tab.
2. Select the Add button.
3. Select *Time Type* as the Field.
4. Create a new row.
5. Access the Create Change Job (All) Defaults Condition Rule task from the Condition Rule prompt.
6. Click OK.
7. Enter *Scheduled Weekly Hours Less Than 35* in the Description field.
8. Select these values in the Rule Conditions grid:

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value	)
And		*Scheduled Hours - Proposed*	less than or equal to	Value specified in this filter	*35*	

9. Click OK.
10. Return to the Change Job (All) tab on the Maintain Staffing Field Defaults task.
11. Select *Scheduled Weekly Hours Less Than 35* in the Condition Rule column.
12. In the Value column, select *Part time* as the Specific Value.

Related Information

Concepts

2023R2 What's New Post: Configurable Change Job Defaulting

Tasks

Steps: Set Up Job Changes on page 798
Set Up Recruiting to Staffing Field Defaults on page 205

Set Up Reasons for Job Changes

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Security: *Set Up: Staffing* domain in the Staffing functional area.

Context

Create custom reasons for job changes and map them to these Workday-owned change job types:

- *Data Change*
- *Demotion*
- *Lateral Move*
- *Promotion*
- *Transfer*
- *Swap Positions*

Workday uses the change job type to create a Display ID for the change job event. This Display ID displays in change job-related tasks when you submit a change job event, such as on My Tasks or Worker History.

It provides additional context on the reason for the change. Example: *Data Change: John Smith*, *Lateral Move: Janet Smith*.

You can move a worker to a different manager or supervisory organization using any reason type.

Workday filters reasons based on worker type and whether a manager starts the process. You can designate reasons for managers and nonmanagers to control which types of job changes either role can make. Everyone in the management chain of a supervisory organization can access manager reasons.

Categories display in prompts to help organize reasons on the *Change Job* business process. Although you can create as many reasons and reason categories as you need, we recommend keeping the list short to make selection easier.

Steps

1. Access the Maintain Event Categories and Reasons task.
2. Select the *Change Job* event.
3. Create and organize reasons:
   a) Create a Reason Category.
   b) Create a Reason to display in selection lists.
   c) Map the reason to a Change Job Type:
      - *Data Change*
      - *Demotion*
      - *Lateral Move*
      - *Promotion*
      - *Transfer*
      - *Swap Positions*

   d) Specify whether the reason applies to employees or contingent workers, and whether to display the reason to managers.
   e) Create additional reasons and categories as needed.
4. Select OK.
   Workday displays the view page for the Maintain Event Categories and Reasons.
5. (Optional) View the audit trail for the task.
   a. Access the related actions menu for *Change Job* on the view page for the Maintain Event Categories and Reasons task.
   b. Select Audits > View Audit Trail.

Example

Reason Category	Reason	Change Job Type	For Employee	For Contingent Worker	Manager Reason
Demotion	Decrease in Responsibility	Demotion	X		
Data Change	Change Location	Data Change	X	X	X
	Change Job Details	Data Change	X	X	X
	Change Contract Details	Data Change		X	X
Lateral Move	Move to Another Position on My Team	Lateral Move	X	X	X
Promotion	Increase in Responsibility	Promotion	X		X

Reason Category	Reason	Change Job Type	For Employee	For Contingent Worker	Manager Reason
Transfer	Move to Another Manager	Transfer	X	X	X
Swap Positions	Training	Swap Positions	X	X	X
	Reorganization	Swap Positions	X	X	X

Related Information

Tasks

Steps: Set Up Job Changes on page 798

Set Up Rule Based Consolidated Templates for Job Changes

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Set up the *Change Job* business process.

Security: *Business Process Administration* or *Manage: Business Process Definitions* domain in the System functional area.

Context

You can create multiple consolidated templates with condition rules for the *Change Job* business process.

Example: You want *Assign Employee Collective Agreement* to be a subprocess of *Change Job* only for workers based in the Netherlands. You create a condition rule that makes *Assign Employee Collective Agreement* only available to workers in the Netherlands. When a manager from Amsterdam initiates *Change Job*, the manager sees the employee collective agreement step.

Steps

1. Access the Configure Rule Based Consolidated Template task.
2. As you complete this task, consider:

Option	Description
Rule	You can only create rules that relate to the: • *Change Job* event. • Position. • Worker. Workday uses the first Rule Based Consolidated Template condition that applies. When no rules apply, Workday uses the default *Change Job* business process definition. Note: Ensure that condition rules reflect your requirements. Test all combinations of Change Job Templates, Rule Based Consolidated Templates, and *Change Job* business process definitions to validate expected outcomes.
Business Process Type	The order of these business process types dictates the order that Workday completes the subprocesses.

Option	Description
	For every business process type you select, ensure that the relevant subprocess is a step on the *Change Job* business process definition. The order of business process types in the consolidated template must match the order of subprocesses in the business process definition.

Result

On consolidated *Change Job* templates, the subprocesses start automatically but cancel if you make no changes.

Worker history displays subprocesses as *Canceled*, but the *Change Job* process history displays different statuses for individual steps:

- Initiation: *Automatic Complete*.
- Review: *Manually Skipped*.
- Completion: *Automatic Cancel*.

Related Information
Concepts
Concept: Condition Rules for Job Changes on page 870
Tasks
Steps: Set Up Job Changes on page 798

Set Up Change Job Templates

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Configure the *Change Job* business process.

Set up consolidated templates for the *Change Job* business process.

Security: *Set Up: Staffing* domain in the Staffing functional area.

Context

Set up simplified job change templates that users such as managers can access through these initiating actions:

- Change Contingent Worker Details
- Change Job
- Change Location
- Request Transfer
- Start Job Change

You can specify the sections of the *Change Job* business process that certain security groups can view and edit when initiating through a Change Job template.

Steps

1. Access the *Change Job* business process security policy to assign security groups to the initiating actions.

   You can remove security groups from some *Change Job* initiating actions to ensure that people in those groups can only initiate the simplified job changes.

   Example: You create a Change Location template. When you add managers to the Start Job Change initiating action, you also remove them from the initiating action for Change Location. This security change ensures that managers can only access the simplified version of location changes.
2. (Optional) Access the Maintain Custom Labels task to customize the Start Job Change task and report labels.
3. Access the Maintain Change Job Templates task.
4. As you complete this task, consider:

Option	Description
Template Name	You'll see this name in the What do you want to do? prompt when you initiate the job change. Only active templates display to initiators. You can inactivate any template, but you can't remove a template that's *In Use*. The template name determines what displays when you configure the Start Job Change report on the Worker Profile. There's a text limit of 30 characters for what displays on the button. Once you exceed 30 characters, Workday cuts the text off. You can also search for the template name directly through global search.
Template Order	Configure the order of the change job templates based on how relevant they are for your organization. Users will see these templates in the order you configure when they launch a job change. The order determines which templates display when you configure the Start Job Change report on the Worker Profile. Workday displays the first 5 change job templates as buttons.
Select Reason for Template	For templates without the Enable Enhanced UI for this Template check box selected, the user can see the reason that you select in the Why are you making this change? field, but can't edit. For templates with the Enable Enhanced UI for this Template check box selected, you can configure multiple reasons. Users can select one of those reasons from theWhy are you making this change?field. If there's only 1 reason for a template, the field doesn't display. When you configure the event categories and reasons for *Change Job*, ensure that the changes you make don't affect the Change Job templates.

Option	Description
	Select reasons that apply to your intended initiators. Example: You want to use this template for both Employees and Contingent Workers. You select the Data Change reason because you configured it on the Maintain Event Categories and Reasons task for both employees and contingent workers.
Template Help Text	This text displays beneath the What do you want to do? prompt when a user selects a template. You can translate as needed.
Enable Enhanced UI for this Template	Select to display an enhanced interface for a template. This selection will change the layout of Change Job fields and present a simplified user experience. The enhanced user interface doesn't support: • Templates with Location after Change configured in Select Editable Fields for Start Page. • Evaluating security configurations for Staffing Actions security domains besides *Staffing Actions: Change Job Date and Reason*. Workday automatically selects the Enable Enhanced UI for this Template check box for any templates that include these initiating actions: Change Contingent Worker Details, Change Job , Change Location, and Request Transfer. For those initiating actions: • Inactivate or delete the template to no longer use the enhanced user experience. • Your existing security and condition rule configurations on the *Change Job* business process will apply to any templates you configure. Workday recommends that you review that configuration on the *Change Job* business process using the Edit Business Process Security Policy task. You can initiate a *Change Job* or *Request Transfer* from multiple places, such as the *Hire* business process from Recruiting, or a *Job Change* initiated from Org Studio. Any templates you configure for *Change Job* and *Request Transfer* will apply across Workday.
Apply this Template to Review and Approve Steps	Select to apply your template configuration to display on review and approval steps. This selection enables reviewers and approvers

Option	Description
	to see the same simplified template view as initiators. When selected, your configuration in the Fields to Display field will also apply to review and approval steps. This feature isn't available on Android.
Make this Template Inactive	Select to inactivate the template. You can't inactivate a template that's part of any in-progress change job events. You need to complete or cancel those events to inactivate the template.
Select Initiating Actions	You can specify where initiators can access specific templates, such as when: • Completing mass actions. • Using the Start Job Change task. • Using the Workday Assistant chat box. • Using a REST API. You can create templates for these initiating actions: Change Contingent Worker Details, Change Job , Change Location, and Request Transfer. For those initiating actions, Workday automatically selects the Enable Enhanced UI for this Template check box. Inactivate or delete the template to no longer use the enhanced user experience.
Select Condition Rules	Create or add existing condition rules to a Change Job template. The condition rules are based on the current position of the worker. The template displays when that current position meets all the condition rules.
Select Security Groups	Select security groups to initiate job changes through a Change Job template. The template displays for initiators with access to at least 1 security group.
Select Editable Fields for Start Page	Available on templates without the Enable Enhanced UI for this Template check box selected. Select the information that you want initiators to edit in the Start section of the template. Example: When you include *Location after Change*, initiators can edit the Where will this person be located after this change? field. When you leave this section blank, the initiator still sees these fields: • When do you want this change to take effect? • Why are you making this change?

Option	Description
	The enhanced user interface doesn't support the Location after Change field. To select the Enable Enhanced UI for this Template check box, you must deselect the Location after Change field.
Select Sections for Template	Select the sections of the *Change Job* business process that you want the user to see. Workday hides all other sections from the user. Subsequent steps in the business process definition will display normally and respect rules. When selecting these sections, consider how populating values might affect your job changes. Reviewers and approvers will see additional sections when information has changed. Example: You select *Location After Change* in the Select Editable Fields for Start Page prompt, but don't select *Location Details* in Select Sections for Template. The initiator doesn't see the Location Details section, but the Scheduled Weekly Hours still populates automatically based on the Time Profile of the proposed location. The reviewers and approvers see the Location Details section. Ensure that the sections and subprocesses that you select match the associated consolidated template. Example: You select *Cost Center* to display in the Change Job Template. You ensure that the *Change Organization Assignments for Worker* subprocess is on the associated consolidated template.
Fields to Display	You can configure different fields for different sections based on whether you have theEnable Enhanced UI for this Template check box selected. Select the fields that you want to display. These fields display even when you don't configure them in the Fields to Display column: • End Employment Date, when it's empty for a fixed term employee. • Work Shift, when it's empty and you've configured it as required on the job profile. This feature doesn't apply to templates with Mass Actions configured in the Select Initiating Actions column.
Select Subprocesses for Template	Select the subprocesses that you want the user to be able to view.

Option	Description
	Reviewers and approvers only see changed subprocess information when you configure the subprocesses on the template. When you configure multiple subprocesses using the enhanced user interface, Workday doesn't use the subprocess order that you configure on the Configure Consolidated Template task, which you can access when you select Business Process > Configure Consolidated Template from the related actions menu on the Change Job business process type. Instead, we display each subprocess in this order when configured: • Change Job • Change Organization Assignment • Propose Compensation Change Note: When you exclude the *Propose Compensation* subprocess from a template, ensure you include a review step for *Propose Compensation* in the business process definition. This step prevents unreviewed compensation changes.

5. (Optional) Access the Configure Profile Summary task to enable users to initiate a job change directly from a worker profile.

   Configure the Start Job Change report on Worker Profile.

   Security: *Staffing Actions: Change Job Date and Reason* domain in the Staffing functional area.

   Workday displays the first 30 characters of the first 5 templates you configured on the Maintain Change Job Templates task as buttons on the worker profile.
6. (Optional) Access the Configure Optional Field task to configure fields as hidden, view-only, or required.

   The Change Job business process is available for these functional areas:

   - Change Job
   - Change Organization Assignments for Worker (Enhanced User Interface Subprocesses only)

   Workday only requires or hides the field if your template configuration includes the field. Example: You require the Employee Type field. Your change job template configuration hides the Administrative Details section. The initiator doesn’t see the Employee Type field, because that section is hidden.

   If you hide the Close the Current Position? field using the Configure Optional Fields task, it will still display in the enhanced user interface. To hide this field, you must remove the Opening section from the Sections to Display field on the Maintain Change Job Templates task.

Result

After you submit your changes on the Maintain Change Job Templates task, Workday displays a View Change Job Templates report that you can use to view templates, and download them to PDF.

For templates that select the Enable Enhanced UI for this Template check box, users will see the:

- *Change Job* fields display in the new format and some field label changes.

- Enhanced user interface on Change Job workflow steps, including:
  - *Initiation*, *Save for Later*, *Send Back*.
  - Review steps (including *Review Change Job*, *Review: Receiving Manager*, *Review: Current Manager*).
  - Approve steps.
- Worker's current information displayed on the side panel on editable workflow steps. When they select an effective date, the side panel displays the worker's information as of that effective date.
- Enhanced user interface displayed on mobile devices.
- Make Changes button on editable review steps that leads to a change job workflow. When there is missing or invalid information, Workday displays an error message and Make Changes is the only option. When no changes or corrections are required on editable review steps, users can select Make Changes, Approve, or Send Back.

Next Steps

Users can delegate the Start Job Change initiating action. They can also access the initiating action on the My Team Management dashboard.

You can create reports and condition rules based on Change Job templates.

Related Information

Tasks

Steps: Set Up Job Changes on page 798

Reference

2023R1 What's New Post: Launch Change Job From Worker Profile

2023R1 What's New Post: Change Job Templates for Review and Approval Steps

2023R2 What's New Post: Field Level Configuration for Change Job Templates

2023R2 What's New Post: Change Job Templates New User Experience

2024R1 What's New Post: Change Job Templates New User Experience for Consolidated Templates

2024R1 What's New Post: Change Job Templates New User Experience

2024R2 Feature Release Note: Change Job New User Experience for Workflow Steps

2024R2 Feature Release Note: Change Job Templates New User Experience for Initiating Actions and Multiple Reasons

Reference: Change Job Initiation on page 832

Steps: Set Up Swap Positions

Context

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

You can set up a single business process to swap workers between positions, ensuring that job and organization assignment changes occur simultaneously and without error. This business process enables you to swap multiple workers at once for mass reorganizations or worker rotation.

Steps

1. Set Up Reasons for Job Changes on page 857.

   Create reasons on the Maintain Event Categories and Reasons task.

   a. Select *Change Job* in the Event field.
   b. Create reasons with *Swap Positions* selected in the Change Job Type column.

   To use the Swap Positions task, you must configure at least 1 reason with the *Swap Positions* Change Job Type.

2. Configure Rule-Based Business Processes.

   Configure these business processes and security policies in the Staffing functional area:

   - *Change Job*
   - *Change Organization Assignments for Worker*
   - *Swap Positions*

   When the Change Organization Assignments task is on the *Change Job* consolidated template, it must be the *Complete* step on the *Change Job* business process definition.

   When these events are on the *Change Job* consolidated template, they must be after the *Complete* step on the *Change Job* business process definition:

   - *Employee Collective Agreement*
   - *Propose Compensation*

   When you include the *Review: Receiving Manager* step on the *Change Job* business process definition, it must:

   - Be before the *Complete* step.
   - Have this Workday-owned If condition: *Initiating User isn't the same as the Processing User or Initiated by Request Transfer Task or Swap Positions?*

   The *Change Organization Assignments for Worker* business process definition must have the *Initiation* step as the *Complete* step.

   Don't place exit validations on the *Change Job* or *Change Organization Assignments* business processes, as they can prevent the position swaps from completing simultaneously.
3. Create Custom Business Processes.

   Configure the *Swap Positions* business process definition to include only an initiation step and review steps. Include the optional *Review Swap Positions* step to route to an approver before the swap completes. If you specify a role-based security group on the *Review Swap Positions* step, select the All check box, ensuring that all swaps within a list are approved simultaneously.

   You can enable managers to request position swaps for their workers with the Request Swap initiating action. Configure the *Swap Positions* business process definition to include the *Review Swap Positions: Current Manager* step and select the *Current* option in the Routing Modifier column. This setting ensures that the managers of both employees can approve the swap before it occurs.

   To ensure that swap requests, ignore the *Review Swap Positions* step, create an entry condition rule using the Initiated from Request Swap report field.

   We recommend that you create only 1 *Swap Positions* business process definition per tenant. This practice ensures that position swaps can complete across all organizations.
4. (Optional) Embed a worklet on the initiating action of the *Swap Positions* business process to include position data from custom reports in position swap events.

   Configure the worklet prompt to include the Position field on the *Swap Positions Task* business object. This configuration enables the worklet to display the positions included during initiation of the swap, as well as information related to those positions. The worklet displays on the second page of the Swap Positions task.

   See Add Worklets to Business Processes on page 2969.

5. Edit Domain Security Policies.

   The *Staffing Actions: Swap Positions - View Events* domain controls access to the View Swap Positions Events report.

   The *Swap Positions - List* domain controls access to these tasks and reports:

   - Create Swap Positions List task.
   - Edit Swap Positions List task.
   - Find Workers for Swap Positions report.
   - View Swap Positions List report.

Next Steps

Access the Create Swap Positions List task to select workers and add them to lists for future position swaps. Use these lists to prepare for mass position swaps ahead of time. Anyone with access to a list can swap the workers in that list, including workers that they don't otherwise have permission to view.

Access the Swap Positions task to perform position swaps. Each time you initiate a position swap, you can either select a previously created list or select workers individually within the task.

Related Information

Concepts

Concept: Position Swaps on page 829

Steps: Set Up Mass Action Workbooks to Initiate Change Job

Context

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

You can set up mass actions to initiate the *Change Job* business process in bulk for up to 1000 workers.

Steps

1. Set up mass action workbooks.

   Steps: Set Up Mass Actions.
2. Edit Business Process Security Policies.

   Configure security permissions for the *Change Job* and *Change Job (Mass Action)* initiating action on the *Change Job* business process policy.

   Configure security permissions for the *Change Organization Assignments for Worker (Mass Action)* and *Change Organization Assignment (REST)* initiating actions on the *Change Organization Assignments for Worker* business process policy.

   Ensure that these security groups are also on the *Mass Action Event* business process security policy.

   Ensure that you add the *Complete Mass Action Event* step and mark it as the completion step.
3. (Optional) Add additional facets to the Launch Mass Change Job report. To add additional facets, copy the delivered Launch Mass Change Job standard report to a custom report, and add any additional filters to the report definition.
4. (Optional) Create Custom Reports.

   Create or edit a custom report that has a data source containing positions or position restrictions. You can use the report or report filter to populate up to 1000 workers in the workbook using the Launch Mass Action Event task.

5. (Optional) Create or edit a search report that has a data source containing positions or position restrictions. You can select workers in the search report to populate up to 1000 workers in the Launch Mass Action Event task.

   Ensure that you select *Launch Mass Action Event* from the Mass Action column on the Advanced tab of the search report.

   See Steps: Create Search Reports.

Next Steps

Access the Launch Mass Change Job report, the Launch Mass Action Event task, or a configured search report to initiate the *Change Job* business process in bulk.

Related Information

Concepts

Setup Considerations: Org Studio and Mass Actions

Setup Considerations: Job Changes on page 792

Tasks

Steps: Set Up Job Changes on page 844

Reference

2022R2 What's New Post: Mass Actions in Workbooks for Change Job

Steps: Enable Machine Learning Recommendations for Change Job

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

You can enable the *Change Job* business process to use machine learning and automatically provide relevant recommendations for these fields:

- Change Job Reason
- Compensation Plan
- Cost Center

- Job Profile
- Location

Once you opt in, it takes approximately 2 weeks for Workday to process your data and present recommendations. During this time, the Recommendations folder on the Job Profile field might be empty. To use the most relevant data, we recommend that you enable this feature in your production tenant. This feature might not give good recommendations for workers with limited job change history, or a new cost center, job profile, or location.

We don't support translations for this feature.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.

   a. Access the Innovation Services Opt-In task.
   b. Navigate to the Cross Application Services category.
   c. Select the Intelligent Core Generally Available Features check box.
   d. Click OK.
   e. Access the Maintain Innovation Services Data Selection Opt-In task.
   f. In the Innovation Services Valid for Maintain Data Opt-In field, select the Cross Application Services Intelligent Core Generally Available Features category.
   g. Click OK.
   h. In the View Data Categories for Feature field, select *Machine Learning Recommendations for Change Job*.
   i. Opt-in to the relevant categories.
   j. Click OK.
2. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality. The default region for data processing is the U.S.

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.
3. (Optional) Hide machine learning suggestions for specific fields.

   Access the *Change Job* business process type on the Maintain Functionality for Staffing Transactions task.

   Example: You want to hide machine learning suggestions in production while Workday processes your data.

Result

Workday will begin using machine learning to display and suggest relevant values when users complete a job change.

Related Information
Tasks
2024R1 What's New Post: Machine Learning Recommendations for Change Job
Workday Community: Workday AI Factsheets

Initiate Change Job in Mass Action Workbook

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

- Configure the *Change Job* business process.
- Set up mass action workbooks for changing jobs.
- Security: *Mass Action Events* domain in the System functional area.
- (Optional) Enable change job templates for mass actions in the Maintain Change Job Templates task.

Context

You can initiate the *Change Job* business process in bulk with a mass action workbook. Mass change job also includes *Change Organization Assignments for Worker* as a subprocess.

You can add up to 1000 contingent workers and employees to the workbook by:

- Using the Launch Mass Change Job report.
- Selecting a report in the Launch Mass Action Event task.
- Using a search report to access the Launch Mass Action Event task.
- Adding them manually in the workbook.

Note: Even if certain fields such as Job Classification, Work Shift, or Work Space are displayed in a workbook, they respect the configuration in Maintain Localization Settings. Example: If you require Work Shift in Configure Optional Fields but disable in Maintain Localization Settings, you can't enter values for Work Shift in workbooks. Similarly, if you hide Work-Study in Configure Optional Fields and require for a job profile, you can't enter values for Work-Study in workbooks.

Steps

1. Access the Launch Mass Change Job report.
2. Select the population intended for mass change job and click Launch Mass Action.
3. Access the Launch Mass Action Event task.
4. As you complete the task, consider:

Option	Description
Effective Date	Select the date when mass change job takes effect.
Do you want to use the next pay period?	If selected, this field takes priority over Effective Date.
Change Job Template	For constrained security groups, Workday displays templates based on access permissions.

5. After the workbook generates, click Open Workbook.
6. Complete the details in the workbook using the prompts and validation messages.

   You can update and enter specific fields for workers, if needed. Example: You enter a Proposed Supervisory Organization for the workers.
7. Click Validate All.
8. Resolve errors and submit the workbook.

   You can submit a workbook with errors. Any rows with errors remain in the workbook instead of initiating the *Change Job* business process. You can access the workbook later to resolve and submit the remaining rows.

   Note: Mass actions using workbooks can't apply the Start Page Editable Fields and Condition Rules Applied options of change job templates configuration.

Result

The *Change Job* business process initiates for the relevant workers in the workbook. Any other steps on the business process route for completion.

Related Information

Tasks

Steps: Set Up Mass Actions

Steps: Set Up Mass Action Workbooks to Initiate Change Job on page 816

Reference

2022R2 What's New Post: Mass Actions in Workbooks for Change Job

Create Help Text for Change Job

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Security:

- *Business Process Administration* or *Manage: Business Process Definitions* domain in the System functional area.
- *Set Up: Guidance Workspace* security domain in the User Success Platform functional area.

Context

You can provide 3 types of help text for the *Change Job* business process:

- Step help. In the initiation, review, and approval steps, you see this text on all pages of the Guided Editor, and at the top of the Summary Editor. This text also displays on the page where you select the Worker or Job if:
  - You access the Change Job, Change Location, or Request Transfer tasks through search.
  - A worker has multiple jobs.
- Section group help. You only see this text in the Guided Editor, below the step help text in each section.
- Quick tips using Guidance Workspace. You can create customized field-level support text in the UI.

If you consolidate *Change Job* with *Propose Compensation Change* and *Change Organization Assignments for Worker*:

- The Organizations and Compensation sections display Section Group help text only.
- Help text for the initiation step isn't available.

You can also configure a guided tour as field-level help text to guide users through the change job process using the Configure Guided Tours task.

Steps

1. Define step help text:
   a) Access the default definition of the *Change Job* business process.
   b) As a related action on a step, select Business Process > Maintain Step Help-Text.
2. Define help text for the section group.
   a) Access the View Business Process Template report.
   b) Select *Change Job*.
   c) On the Section Groups tab, click Configure Help Text in the Configure Section Group column.

   Note: Workday only displays help text defined at the section group level. You can copy existing section-level help text to the section group level by clicking Configure Help Text in the Configure

Section column. If you defined Summary Page help text on the Instructional Text tab, you can copy this text to the initiation step help in the *Change Job* business process.

Repeat this procedure for the *Propose Compensation Change* and *Change Organization Assignments for Worker* business processes. The Guided Editor displays this help text in the Organizations and Compensation sections of the consolidated processes.

3. Steps: Set Up and Manage the Guidance Workspace.

   Define field-level help text to guide users through the change job process using the Guidance Workspace tool.

   Select from these Change Job initiating actions in the Tasks report.

   - *Change Job*
   - *Start Job Change*

   Any user that accesses the task sees your guidance.

Related Information

Concepts

Concept: Business Process Templates

Tasks

Steps: Set Up Job Changes on page 798

Set Up Guided Tours

Transfer, Promote, or Change Job

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

- Configure the *Change Job* business process and security policy in the Staffing functional area.
- If you want to transfer a worker to a new manager, verify that the new manager's organization exists and the manager role is assigned.

Context

Perform job changes for employees or contingent workers, ranging from staffing events such as transfers and promotions to simple data changes.

If you're promoting someone into a managerial role, you can also create their supervisory organization as part of the promotion.

Steps

1. Access the Change Job task and select a Worker.
2. In the Start section, select the date, reason, manager, supervisory organization, and location.
   - If you have pay groups configured, you can select the next pay period to align the start date with your pay cycle.
   - Access the Maintain Event Categories and Reasons task to define the reasons.
3. Complete each section.

   Workday displays sections based on your security permissions and the *Change Job* business process configuration.

   Workday displays fields based on the type of change job template you select:

   - For change job templates with an enhanced user interface, Workday only shows fields that are relevant to you and that you can edit. Fields are dynamically displayed based on security access and your tenant configuration. Example: You initiate a Change Job transaction. You can see the Position field. You edit the Supervisory Organization to an organization that you don't have a role on. Workday dynamically hides the Position field.

- For change job templates:
  - Without an enhanced user interface, Workday displays the Position field even if there are not open positions for the supervisory organization.
  - With an enhanced user interface, Workday defaults the current position and doesn't display the Position field.

Use the navigation bar to move between sections or click Summary to complete all sections on 1 page.

Option	Description
Move	Displays when you're moving a worker to a new supervisory organization. In the Opening section, specify whether you plan to backfill, move, or close the headcount: • Workday automatically populates Move when you move workers between job management organizations. • A tenant setting determines which headcount option automatically populates for position management organizations, but you can change it. • If you plan to backfill the position, specify whether to make it available for overlap before the incumbent departs. This option displays when you enable your Workday tenant for job overlap and the position is in an organization that uses the position management staffing model. Move Team. If you're moving a manager to a new organization, specify whether to move the manager's teams or keep them in their current organization.
Job	If you're moving a worker within the same organization, you can select the position for overlap or close it. If you restrict job profiles by country, the proposed location determines which job profiles you can select.
Details, Organizations, Compensation, Collective Agreement	HR administrators typically complete these sections. The Organizations section only displays when the worker is directly assigned to an organization. If the current organization was assigned using a membership rule, the Organizations section doesn't display.

Result

Workday adds the event to the worker's history, labeled as a *Transfer*, *Promotion*, *Lateral Move*, *Demotion*, or *Data Change* depending on the reason type you selected.

When you report on job changes, the *Move Position* report field returns true when you keep the worker in the same position as before, and false when you move the worker to a different position but keep the position in the same organization.

Related Information

Concepts

Concept: Promoting Workers to Managers on page 829

Concept: Move Manager's Team on page 825

Setup Considerations: International and Domestic Assignments on page 893

Tasks

Steps: Set Up Job Changes on page 798

Request Transfer

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Configure the *Change Job* business process and security policy in the Staffing functional area.

Context

Request a transfer for any worker outside your current organization. The request routes to the worker's current manager for approval, then comes back to you so you can enter job details and other relevant information.

When you use Request Transfer to initiate the *Change Job* business process, Workday hides everything except the Start and Move sections. After the worker's current manager approves the transfer, the new manager completes the fields in the rest of the sections, including Job, Location, Details, and Attachments, and Organizations, Compensation, and Collective Agreement if you have a consolidated template.

You can only secure the Request Transfer initiating action to constrained role-based security groups. Request Transfer is only available to roles that don't have access to the Change Job task for the selected worker. Because HR Administrators can access all workers with Change Job, they don’t need access to the Request Transfer initiating action. Example: You and Peter Smith are in Organization A. You manage Peter Smith, and want to move him to Organization B. You initiate aChange Jobfor Peter Smith. You want to bring Alisha Vargas into your organization from Organization B. You can't initiate aChange Jobbecause she isn't in your organization. You initiate a Request Transfer instead.

Steps

1. From the related actions menu of a worker, select Job Change > Request Transfer.
2. In the Start section, select the date, reason, manager, supervisory organization, and location.
    - If you have pay groups in Workday, you can select the next pay period to align the start date with your pay cycle.
    - You can define job change reasons by accessing the Maintain Event Categories and Reasons task.
    - If you're a manager, Workday automatically populates your name and organization. If you manage multiple organizations, you can select a different organization.
    - If you have another role, the proposed manager automatically populates from the highest organization you support, but you can select a different manager.
    - When you restrict job profiles by country, the proposed location determines which job profiles you can select in the Job section.

3. In the Move section, specify whether to move a manager's teams or keep them in their current organization.

   Note: You only see the Move section if the worker is a manager.
4. On the Summary page, click Submit.

   Workday sends the request to the worker's current manager, who can take these actions before approving the request:

   - Change the effective date and reason.
   - Specify whether to backfill, move, or close the headcount.
   - Specify whether the position is available for overlap before the worker transfers. This option is available when the manager plans to backfill the position, the transfer date is in the future, your Workday tenant is enabled for job overlap, and the organization uses the position management staffing model.
5. Go to My Tasks to complete the rest of the transfer details.

   The information you need to provide depends on your security permissions and the *Change Job* business process configuration. You can click Guide Me to complete the sections individually.

Result

Workday adds the *Transfer* event to the worker's history.

Change Location

Prerequisites

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Configure the *Change Job* business process and security policy in the Staffing functional area.

Context

Change the work location for an employee or a contingent worker.

- Change Location is an initiating action for the *Change Job* business process that displays only relevant fields in the Start, Location, and Details sections.
- The Job and Organizations sections are hidden, even in review and approval steps.
- If you consolidate the *Change Job* business process with *Assign Employee Collective Agreement* and *Propose Compensation Change*, these sections are also hidden:

  - Collective Agreement
  - Compensation

  You may need to configure a consolidated template override to hide the Compensation section for all security groups. From the related actions menu on the *Change Job* business process type, select Business Process > Configure Business Process Consolidated Template Override. Configure the *Change Location (Change Location)* initiating action.

To change a work space location without initiating any other staffing transactions, use the *Change Work Space* business process.

Steps

1. As a related action on a worker, select Job Change > Change Location.

2. In the Start section, select the date, reason, and new location.
    - If you have pay groups in Workday, you can select the next pay period to align the start date with your pay cycle.
    - Access the Maintain Event Categories and Reasons task to define reasons.
    - You can't change the manager or supervisory organization.
3. Complete the Location and Details sections individually, or click Summary to complete everything on 1 page.

Result

Workday adds the *Data Change* event to the worker's history.

Concept: Move Manager's Team

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

When you use the *Change Job* business process to move a manager to a new organization, you can also move the teams that report to that manager. Workday displays the:

- Teams that are eligible to move.
- Teams that are ineligible to move due to a future-dated change.
- Person who will manage the teams if you don't move them.

You either can move all eligible teams or leave all teams behind. You can't pick teams or individual team members that you want to move.

Moved teams retain their current:

- Headcounts.
- Job openings.
- Job requisitions.
- Subordinate organizations.

After you submit the job change, Workday initiates 1 *Assign Superior* subprocess for each eligible team, with its own workflow and approvals. You can cancel, rescind, or correct the individual *Assign Superior* subprocesses as needed. However, you can't reverse the original decision to move, or not move, a manager's teams by correcting *Change Job* events. To reverse that decision, you would have to cancel or rescind the *Change Job* business process and start again.

You don't see the option to move teams when you:

- Move a worker who isn't a manager.
- Keep a manager in the same supervisory organization.
- Move a manager who also manages an organization that is a superior of the proposed organization.
- Move a manager whose supervisory organization has an organization hierarchy event in progress. Example: An in-progress *Create Subordinate* event.
- Move a manager whose team is in a subordinate organization that isn't part of their supervisory hierarchy. Example: The manager is part of Supervisory Organization 1, which has Subordinate Organizations A, B, and C. However, the manager's team is part of Subordinate Organization D.

To set up the option to move teams:

- Add roles to the *Staffing Actions: Move Manager's Team* domain. This domain inherits its initial security policy from the *Staffing Actions* domain.
- Modify the default definition for the *Change Job* business process to include 2 additional steps: *Assign Roles - Change Assignments for Worker* and *Change Superior Organization*. Both steps must come after the *Change Job* completion step.

Step	Details
(Optional) *Assign Roles - Change Assignments for Worker*	Ensures that the worker has the manager role before you move the manager's teams. All of the worker's previous roles automatically populate, including the manager role. You can remove the default role assignments, add new roles, or reassign roles as needed. Alternatively, you can use the *Copy Role Assignments* step for Job Management organizations when you have the Change Job Use Default Organizations for Job Management check box enabled. Both *Assign Roles - Change Assignments for Worker* and *Copy Role Assignments* must come before the *Change Superior Organization* step.
Change Superior Organization	Workday suggests that you include an approval step in the *Assign Superior* business process definition; otherwise the step completes automatically as part of the *Change Job* workflow. Ensure that you grant permission on the *Approve* action for the *Assign Superior* business process as well.

To populate *Yes* automatically on the This person is a manager. Do you want to move their teams with them? field, you can select the Change Job Default for Move Team with Manager check box on the Edit Tenant Setup - HCM task.

Related Information

Concepts

Concept: Assign Roles

Tasks

Steps: Set Up Job Changes on page 798

Reference

2021R1 What's New Post: Move Team with Manager

Concept: Access to Job Profiles

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

The *Change Job* business process provides access to job profiles and related compensation data based on these considerations.

Availability of Hiring Restrictions

When you use the stand-alone *Change Job* business process, you can access job profiles if restrictions exist, and you meet those restrictions. If restrictions don't exist, you can access job profiles only if:

- A worker remains in the same position.
- You move a worker to a new position, and you select the Allow Override of Restrictions on Staffing Events check box in the Edit Tenant Setup - HCM task.
- There aren't any restrictions, in which case, you can access all job profiles.

Compensation Details

Because compensation eligibility rules are often linked to job profiles, Workday enables you to restrict access to compensation data by creating hiring restrictions. If you consolidate *Change Job* with *Propose Compensation Change*, you can view compensation details if you meet at least one of these conditions:

- Hiring restrictions don't exist.
- Hiring restrictions exist and you select a job profile that meets those restrictions.
- Hiring restrictions exist and you have permission on the *Staffing Actions: All Job Profiles with Compensation* domain.

When you configure compensation details to display based on supervisory organization, Workday only uses the proposed supervisory organization.

Job Requisitions

If you use job requisitions, you can't select a different job profile for a worker who remains in the same position. Update the job requisition or the hiring restrictions to include the additional job profile before you launch the Change Job task:

- If the worker's position has an open job requisition, use the Edit Job Requisition task to add other job profiles to the requisition.
- If the worker's position doesn't have an open job requisition, use the Edit Position Restrictions task to add other job profiles to the hiring restrictions.

Optionally, you can select the Allow Override of Restrictions on Staffing Events check box in the Edit Tenant Setup - HCM task. This setting enables you to access job profiles that aren't part of the hiring restrictions on the job requisition.

Related Information

Tasks

Steps: Set Up Job Changes on page 798

Reference

Reference: Hiring Restrictions in Change Job on page 873

Concept: Worker Transfers

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

You can use the *Change Job* business process to transfer a worker to a different organization. The *Change Job* business process combines steps into a single workflow to:

- Route the business process steps.
- Determine organization roles who're responsible for those steps.
- Assign default organizations to the worker.

Route Business Process Steps

When editing steps on the *Change Job* business process definition, administrators can use specific group routing to specify whether the security group is for the organization of the current or proposed position. When you don't provide specific group routing instructions for steps in the *Change Job* business process, Workday automatically routes the business process steps to roles in the worker's proposed organization.

You can consolidate subprocesses within the *Change Job* business process type so that tasks from the consolidated subprocesses initiate at the same time. When you consolidate the subprocesses, Workday:

- Uses the specific group routing that you configure directly on the subprocesses.
- Doesn't apply the specific group routing that you configured on the *Change Job* business process to the subprocesses.

- Uses the specific group routing that you configured on the *Change Job* business process for the *Change Job* web service.

Organization Roles

When you transfer a worker to a different organization, Workday routes the business process steps to the organization roles based on information included in the *Change Job* business process.

Business Process Details	Step Routing
The *Change Job* business process includes the Proposed Supervisory Organization.	Workday routes the business process steps to the: • Default organizations associated with the proposed supervisory organization. • Location hierarchy associated with the primary location of the proposed supervisory organization.
The *Change Job* business process includes the: • Proposed Supervisory Organization • Position	Workday routes the business process steps to the: • Organizations associated with the proposed position. • Location hierarchies associated with the location hiring restrictions of the proposed position.
The *Change Job* business process includes the: • Proposed Supervisory Organization • Position • Location	Workday routes the business process steps to the: • Organizations associated with the proposed position. • Location hierarchy associated with the proposed location.
The *Change Job* business process includes the: • Proposed Supervisory Organization • Position • Location • Organization Assignments	Workday routes the business process steps to: • All proposed organizations. • The location hierarchy associated with the proposed location.

Organization Assignments

When you run the *Change Job* business process, the *Change Organization Assignments for Worker* subprocess assigns default organizations differently for each staffing model. Organization assignments in both the job management and position management staffing models populate from the job requisition when available. Otherwise, organization assignments:

- In job management populate from the current job or from the proposed supervisory organization, based on whether you selected the Change Job Use Default Organizations for Job Management check box on the Edit Tenant Setup - HCM task.

- In position management populate based on whether you're creating a new position.
    - If you're creating a new position, the organization assignments populate from the proposed supervisory organization if available. When a proposed supervisory organization isn't available, the organization assignments populate from the current position.
    - If you aren't creating a new position, the organization assignments populate from the proposed position restriction. When a proposed supervisory organization isn't available, the organization assignments populate from the current position.

When you consolidate *Change Job* with *Change Organization Assignments for Worker*, each time you modify the proposed supervisory organization, Workday re-evaluates the default organizations. When you run the *Change Organization Assignments for Worker* business process independent of the consolidated template, the default organizations don't change after initial selection.

Related Information
Tasks
Steps: Set Up Job Changes on page 798

Concept: Position Swaps

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

A position swap in Workday enables you to select 2 or more workers and then move them into each other's positions by initiating a single business process transaction. You can use position swaps for company reorganization, worker rotation, and businesses that consistently move workers between locations. Example: Moving retail managers from 1 store to another.

You can only swap position management positions. If a worker has multiple positions, you can select which position to swap. You can select a worker multiple times in 1 swap to include several of their positions in the swap.

You can only swap workers with matching worker types. Example: You can't swap a contingent worker into an employee position.

You can't swap a position that uses internal Workday pay groups with a position that uses external pay groups.

Business Processes

The *Swap Positions* business process initiates the *Change Job* business process to perform the job changes for the swapped workers. When you swap workers between organizations, the *Change Job* business process also initiates the *Change Organization Assignments for Worker* business process.

Workday automatically completes the *Change Job* business process based on the information from each filled position. Workday also provides validations to ensure that all positions swap at the same time. When 1 position can't swap, no part of the transaction can complete.

Reports

Position swaps display in worker histories as job and organization assignment changes. You can view changes using the View Swap Positions Events report.

Related Information
Tasks
Steps: Set Up Job Changes on page 798

Concept: Promoting Workers to Managers

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

You can promote a worker into a managerial role and automatically create their supervisory organization using the *Change Job* business process. The worker must belong to an organization that uses the job management or position management staffing model. To set up this option:

- Add a *Create Subordinate* step after the completion step in the *Change Job* business process.
- Add a condition rule that determines when to initiate the step. Example: Change Job Reason = *Promotion*.
- Assign the step to an HR role.

After the *Create Subordinate* subprocess completes, Workday:

- Creates a supervisory organization as a subordinate to the worker's current organization.
- Assigns the worker to the Manager role.
- Applies hiring restrictions from the parent organization (job management staffing model only).

If you rescind the *Change Job* business process, Workday doesn't rescind these subprocesses:

- *Create Subordinate*
- *Assign Roles*
- *Hiring Restrictions*

If you don't want to keep the new organization, inactivate it. Rescinding the *Create Subordinate* subprocess only removes it from the organization hierarchy.

Note: You can also use *Change Job* to launch the *Move to New Manager* business process. Use this option to create a supervisory organization and transfer a worker to a nonmanager in another organization without changing the nonmanager's current job or position.

Related Information
Tasks
Steps: Set Up Job Changes on page 798
Move Workers to New Managers on page 920
Transfer, Promote, or Change Job on page 821

Concept: Condition Rules for Job Changes

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

You can add condition rules to the *Change Job* business process to determine which subprocesses can be initiated during a job change. Workday evaluates the condition rules based on data entered on the Start Details page.

Example

You add *Change Organization Assignments* as a subprocess to the *Change Job* business process. You create a condition rule for the *Change Organization Assignments* step to run only when a worker's location changes:

And/Or	Source External Field	Relational Operator	Comparison Type	Comparison Value
And	Location - Proposed	NOT exact match with the selection list	Value from another field	Location - Current

The implications of this condition rule:

1. Teresa's manager, Steve, accesses the Change Job task and changes Teresa's location on the Start Details page.
2. Steve reviews the Organizations section, changes Teresa's cost center, and submits the changes.

3. The condition rule on the *Change Organization Assignments* step determines that Teresa's location changed.
4. The process routes to an HR administrator for review, and the administrator approves the change.
5. Workday updates Teresa's location. Based on the condition rule on the *Change Organization Assignments* step, Workday also updates Teresa's cost center.

Related Information

Tasks

Steps: Set Up Job Changes on page 798

Create Business Process Condition Rules

Concept: Employee Contracts in Change Job Events

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

You can end an employee's existing contract and start a new contract in a single *Change Job* event. Add 2 consecutive *Maintain Employee Contract* steps to the *Change Job* business process definition. The Order of these steps must be consecutive. Example: You add two rows for the *Maintain Employee Contract* subprocess to the *Change Job* business process definition. You enter *a* in the Order field for the first row, and *b* in the other one.

This approach provides flexibility when you use the *Change Job* business process to transfer an employee to another position. A position can have only 1 active contract at a time, as determined by the contract end date. If the employee has an existing contract, you can end that contract and start a new one. The new contract reflects the changes to the employee's position, job profile, or location.

Maintain Employee Contract Steps

Workday displays the first *Maintain Employee Contract* step based on details from the worker's existing contracts:

Existing Employee Contract	Description
Status	If there's an existing employee contract that's: • Active, Workday updates the current contract. • Inactive, Workday starts a new contract.
Date	If the existing contract end date is before the effective date of the *Change Job* event, the contract details won't populate because the contract has ended. You can add a new employee contract in the *Maintain Employee Contract* step. The effective date of the contract populates from the *Change Job* effective date. If you select a contract end date that's before the *Change Job* effective date, Workday updates the contract effective date to the same date.

Workday runs the second *Maintain Employee Contract* step when the:

- Order field is properly configured on the business process definition. This business process step must be after the previous one, and not parallel to it.
- *Change Job* process has an in-progress or completed *Maintain Employee Contract* subprocess.
- Contract in the first *Maintain Employee Contract* step has an end date that is before the effective date of the *Change Job* event.

When the Workday-owned condition rule is met, the step starts a new contract.

Web Service

The *Change Job* web service supports only 1 *Maintain Employee Contract* subprocess. If you use the web service to upload job changes that end existing employee contracts, create the contracts manually using the Add Contract task. The *Change Job* business process sends the second *Maintain Employee Contract* step to the assigned person's My Tasks.

Related Information
Tasks
Steps: Set Up Job Changes on page 798

Reference: Change Job Initiation

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Workday enables you to decide how you want administrators to initiate the *Change Job* business process for a worker. This discoverability enables you to make starting a job change more intuitive for users.

Option	Description
Global Search	Users can initiate the business process from these initiating actions through global search: • Change Contingent Worker Details • Change Job • Change Location • Request Transfer • Start Job Change Users can search for change job templates and launch the Start Job Change initiating action automatically from global search on desktop and mobile. Workday displays the change job template in global search when the user has access to the template.
Worker Profile	Enable users to launch change job templates from a worker profile by setting up the Start Job Change report as a profile card.
Dashboards	Add the Change Job task to the My Team Management dashboard to help managers track and manage job changes and time-sensitive tasks for their teams. Enable users to launch change job templates from dashboards on desktop by setting up the Start Job Change report as a worklet on these dashboards: • My Team Management. You can make it required on the Maintain Dashboards task. • Your custom dashboards. Go to the Enable Worklet for Dashboard task and select Start Job Change to enable it for the custom dashboards you choose. Then, you can add the Start Job Change worklet to the

Option	Description
	configured dashboards on the Maintain Dashboards task.
REST API	Use the `jobChanges` REST API to start and submit job changes. You can update worker information, such as: • Location. • Business Title. • Job Profile. • Position. • Job Classification.

Related Information

Concepts

2023R2 What's New Post: Launch Change Job Templates From Dashboards

2023R2 What's New Post: Search Change Job Templates

Reference: Hiring Restrictions in Change Job

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

Workday determines when to apply hiring restrictions in the *Change Job* business process by considering:

- How the tenant is configured for staffing.
- If the worker is moving to a different supervisory organization.
- If the proposed organization has a different staffing model.

Workday then decides whether to move the worker and position together, or to apply hiring restrictions against a new position.

Optionally, you can loosen restrictions on job profiles, locations, time types, and worker types by selecting the Allow Override of Restrictions on Staffing Events check box in the Edit Tenant Setup - HCM task.

Job Management

You can control whether workers get new positions when they move between job management organizations that have the same staffing model. In the Edit Tenant Setup - HCM task, select the Change Job Use Default Organizations for Job Management check box to place workers into new positions. Leave it unchecked to move workers and positions together.

If a worker stays in the same organization, Workday always keeps the same position regardless of the tenant setting.

Workday uses these criteria to apply hiring restrictions in job management organizations:

Tenant Setup: Change Job Use Default Organizations for Job Management	Organization Change?	Staffing Model Change?	Move Position?	Apply Hiring Restrictions?
Yes	No	No	Yes (based on same organization)	No
Yes	Yes	No	No (based on tenant setting)	Yes

Tenant Setup: Change Job Use Default Organizations for Job Management	Organization Change?	Staffing Model Change?	Move Position?	Apply Hiring Restrictions?
Yes	Yes	Yes	No (based on staffing model change)	Yes
No	No	No	Yes (based on same organization)	No
No	Yes	No	Yes (based on tenant setting)	No
No	Yes	Yes	No (based on staffing model change)	Yes

Position Management

In position management organizations, Workday applies hiring restrictions as shown.

Organization Change?	Staffing Model Change?	Move Position?	Apply Hiring Restrictions?
No	No	Yes	No
Yes	No	Yes	No
Yes	Yes	No	Yes

Related Information
Concepts
Concept: Access to Job Profiles on page 867
Tasks
Steps: Set Up Job Changes on page 844

FAQ: Change Job

Note: This topic is relevant to the legacy change job experience. We plan to retire this topic in a future release.

- What happens if I don't uptake the new enhanced user interface for change job templates? on page 835
- Why is the Enable Enhanced UI for this Template check box grayed out? on page 835
- Why doesn't the Position field show up on templates with the enhanced user interface enabled? on page 835
- Where is the Attachments section? on page 836
- Why is the old experience showing up when I start a job change through Workday Recruiting? on page 836
- What security configuration should I have for the new user experience? on page 836
- What type of help text can I configure on Change Job? on page 838

Enhanced User Interface for Change Job

What happens if I don't uptake the new enhanced user interface for change job templates?	We made the decision to make the Change Job enhanced user interface the single default experience for all users because the new experience not only matches current functionality but it significantly extends job change capabilities. The new Change Job experience is a much more seamless and user-friendly experience and it streamlines the entire process from start to finish. We've seen that the new user experience has proven to both reduce time to transact and increase completion rates. For customers who have: • Not adopted Change Job Templates: Workday will automatically migrate your current *Change Job* business process into the necessary change job templates configured with the new user experience. Certain domain security configurations will be automatically converted. Additional review by your Administrator will be required to ensure capabilities meet current security requirements. • Adopted Change Job Templates but have not adopted the new user experience: Workday will automatically convert existing templates to use the new user experience. Customers will need to evaluate their security setup to make changes that align with their business needs.
Why is the Enable Enhanced UI for this Template check box grayed out?	On the Maintain Change Job Templates task, you either need to: • Select an initiating action. • Remove Location after Change from the Select Editable Fields for Start Page prompt.
Why doesn't the Position field show up on templates with the enhanced user interface enabled?	In the enhanced user interface for Change Job, we only display the Position field when you can edit it. The Position field is visible when: • The Position field is included in the change job template. • There's an open position in the supervisory organization. • The initiator has access to the proposed supervisory organization, such as through the Manager or Cost Center Manager roles. • The Move Position check box isn't selected. If these conditions aren't met, then Workday defaults the current position and doesn't display the Position field. For change job templates without an enhanced user interface, Workday displays the Position field even if there are no open positions for the supervisory organization.

Where is the Attachments section?	Change Job no longer has an Attachments section because it follows the standard business process framework. Any existing Change Job templates that you'd created that only contained the Documents section are no longer accessible. You must configure the Attachment Settings in BP Toolbar in order to include attachments in your Change Job transactions. See ../../../../manage-workday/business-processes/manage-business-processes/ala1404761315058.dita.
Why is the old experience showing up when I start a job change through Workday Recruiting?	If an internal candidate is moving to a new supervisory organization, Workday uses the *Request Transfer* initiating action. If you haven't configured a change job template for *Request Transfer* with the enhanced user interface enabled, Workday uses the old Change Job experience. If the internal candidate is moving within your own supervisory organization, we use the *Change Job* initiating action. If you haven't configured a change job template for Change Job with the enhanced user interface enabled, Workday uses the old Change Job experience.
What security configuration should I have for the new user experience?	For the new user experience, the Change Job business process uses a combination of the following to determine the change job information displayed to a user: • Business process security policy. • Template configuration. • Access to proposed supervisory organization. • Configuration of optional fields. • Localization settings.

- Security domain configuration for these domains, including view and modify access:
  - *Staffing Actions: Change Job Date and Reason*.
  - *Staffing Organizations: Header* for the *Change Organization Assignments* business process.
  - *Worker Data: Collective Agreements* for the *Assign Employee Collective Agreement* business process
  - These compensation domains for the *Propose Compensation* business process:
    - *Add Compensation Plans: Add Allowance*
    - *Add Compensation Plans: Add Bonus*
    - *Add Compensation Plans: Add Calculated*
    - *Add Compensation Plans: Add Commission*
    - *Add Compensation Plans: Add Hourly*
    - *Add Compensation Plans: Add Merit*
    - *Add Compensation Plans: Add Period Salary*
    - *Add Compensation Plans: Add Salary*
    - *Add Compensation Plans: Add Stock*
    - *Add Compensation Plans: Add Unit Salary*
    - *Compensation Change: Allowance*
    - *Compensation Change: Bonus*
    - *Compensation Change: Calculated*
    - *Compensation Change: Commission*
    - *Compensation Change: Compensation Basis Details*
    - *Compensation Change: Future Changes*
    - *Compensation Change: Guidelines*
    - *Compensation Change: Hourly*
    - *Compensation Change: Manage Compensation Basis*
    - *Compensation Change: Merit*
    - *Compensation Change: Period Salary*
    - *Compensation Change: Salary*
    - *Compensation Change: Stock*

	• *Compensation Change: Total Base Pay* • *Compensation Change: Unit Salary*
What type of help text can I configure on Change Job?	You can configure business process step help text, and QuickTips through the Guidance Workspace report. You can't configure help text for section groups, because section groups don't exist on the new change job experience. We plan to retire the Change Job template on the View Business Process Template report in a future update. We recommend that you use one of the other methods for configuring help text for Change Job. See Steps: Set Up and Manage the Guidance Workspace.

Related Information

Concepts

Article: Get Ready for the Enhanced Change Job Experience with 2025R2

Next Level: Preparing for the New Change Job User Interface

New Change Job

Setup Considerations: Job Changes

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

You can use this topic to help make decisions when planning your configuration and use of the *Change Job* business process. 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 set up job change workflows by configuring and combining tasks and business processes. Example: Transferring a worker initiates a change in benefits and requires the approval of an HR administrator.

The main process to consider is the *Change Job* business process, which controls most job changes between a worker's *Hire* and *Termination* events, including:

- Demotions.
- Job data changes.
- Lateral moves.
- Location changes.
- Promotions.
- Transfers between managers and organizations.

You can enable the *Change Job* business process to use machine learning to provide recommendations for common fields when a user is completing a job change.

Business Benefits

Change Job is intuitive and configurable, enabling you to:

- Minimize manual error.
- Limit the training required for users to perform job changes.
- Configure related events as subprocesses.

You can modify the overall process to suit the needs of your organization. Example: Requiring specific tasks or skipping unnecessary fields based on the job change reason. You can also add a range of nonstaffing tasks as subprocesses that can display and route differently based on many factors, including:

- Who initiates
- How users initiate
- Location
- Organization or manager
- Reason
- Worker type

Once you set up the *Change Job* business process, Workday enables the appropriate users to access and complete the steps.

Use Cases

- Converting individual contributors into managers by assigning other workers to their supervisory organizations.
- Creating and managing internal job requisitions and applications.
- Initiating processes such as compensation changes, location changes, and onboarding new hires.
- Changing an employee's job to a domestic assignment.
- Moving managers or whole teams between organizations.
- Moving workers from 1 manager to another.
- Changing the details for a contingent worker.

Questions to Consider

Question	Considerations
How do you want to customize your change job workflow?	You can configure separate Change Job business process definitions for different organizations. Examples: • You can create a definition for U.S.-based workers and a separate definition for workers based in the UK. • You can create a definition for managers that includes the Approval step and a separate definition for HR Administrator roles that skips the *Approval* step. You can also use condition rules to modify the workflow for each definition. Rule-based definitions are more efficient for high-volume transactions than definitions with the same condition repeated for multiple steps. Example: You can create a rule-based definition that evaluates workers for full-time status, instead of creating multiple steps requiring workers to be full-time employees.

<table>
<tr><th>Question</th><th>Considerations</th></tr>
<tr><td></td><td>You can also configure rule-based consolidated templates to enable initiators to complete some subprocesses during a job change based on condition rules.</td></tr>
<tr><td>What other tasks or subprocesses do you want to include when you make job changes?</td><td>You can add tasks as steps on the Change Job business process, such as:
Assign Pay Group
Change Benefit Elections
Onboarding
Generate Document
Access the Business Process Configuration Options report to find a full list of tasks that you can add to initiate subprocesses on the Change Job business process.

You can also configure some subprocesses as a consolidated template, which enables the initiator to access them when completing a change job.</td></tr>
<tr><td>What should your users be able to see and do when completing job changes?</td><td>You need to create simplified job changes for initiators, reviewers, and approvers using the Maintain Change Job Templates task. These templates enable you to control what information is visible and editable when users access the initiation, review, and approval steps of a job change.

You can also configure a variety of tools to help people complete job changes, such as:
QuickTips that you can configure using Guidance Workspace.
Custom validation rules that ensure users enter data accurately.
Configuring optional fields that are hidden, required, or view-only.
Dynamically updating default values for certain fields based on changes users make to other fields.
Embedded analytics worklets to display additional data.</td></tr>
<tr><td>Do you want to provide machine learning recommendations for users when they complete job changes?</td><td>You can opt in to share data categories with Workday. Once you opt in, it takes approximately 2 weeks for Workday to process your data and present recommendations. To use the most relevant data, we recommend that you enable this feature in your production tenant.

The recommendations depend on the volume of your contributed data. We recommend that you have historical data before you use this feature.</td></tr>
</table>

Recommendations

- Plan for all possible job change scenarios. Consider what you want job changes to look like within your organization and what scenarios you want to prevent.
- The *Change Job* default definition includes all required steps in the correct order. Modify the default definition only as much as necessary to accomplish your business needs. Test often during configuration to reduce errors.
- Revisit your job change configurations whenever you implement new tools and business processes in Workday
- If you have pay groups configured, you can select the next pay period to align the start date with your pay cycle.

Requirements

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.

You need to set up the *Change Job* business process to manage workers in Workday. You must add *Change Organization Assignment* and *Propose Compensation Change* as subprocesses on the *Change Job* business process definition.

In order to use these initiating actions, you need to set up templates for them on the Maintain Change Job Templates task:

- Start Job Change
- Change Job
- Change Location
- Request Transfer
- Change Contingent Worker Details

Limitations

No impact.

Tenant Setup

You can view tenant setup options that impact *Change Job* in these sections of the Edit Tenant Setup - HCM task:

- Staffing
- Job Requisitions
- Leave of Absence

Security

The Change Job business process uses a combination of the following to determine the change job information displayed to a user:

- Business process security policy for the relevant business processes.
- Domain security policy for the relevant domains, including view and modify access.
- Template configuration.
- Access to proposed supervisory organization.
- Configuration of optional fields.
- Localization settings.

The initiator’s access to a proposed Supervisory Organization determines the visibility of many Change Job fields. As a result, Workday might dynamically hide fields and sections from a user.

Security	Considerations
Business Process Administration Manage: Business Process Definitions	Enables you to set up the *Change Job* business process definition.
Change Job business process security policy.	The security groups you configure here can access the *Change Job* business process.
View and modify access to the Staffing Actions: Change Job Date and Reason domain.	Enables you to access the Change Job step and initiating action.
Change Organization Assignments business process security policy. View and modify access to the *Staffing Organizations: Header* domain.	Enables you to access the *Change Organization Assignments* business process, including when it's a subprocess on Change Job. Users with access to this domain can see any organization fields configured on the Change Job template. Example: Company, Cost Center, and Business Unit.
Assign Collective Agreement business process security policy. View and modify access to the *Worker Data: Collective Agreements* domain.	Enables you to access the *Assign Collective Agreement* business process, including when it's a subprocess on Change Job. Users with access to this domain can see all collective agreement fields on the Change Job template.

Propose Compensation business process security policy.
 	
View and modify access to these domains:
 	
• Core Compensation functional area:
    • Add Compensation
    • Compensation Change
• Advanced Compensation functional area:
    • Add Compensation Management Plans
    • Change Compensation Management Plans
	Enables you to access the *Propose Compensation* business process, including when it's a subprocess on Change Job.
	
	Users with access to these domains can see compensation fields on the Change Job template.

Business Processes

Your job change setup can affect downstream events, such as the:

- *Assign Pay Group* business process.
- *Change Benefit Elections* business process.
- *Change Organization Assignments for Worker* business process.
- *Employee Contract* business process.
- *Onboarding* business process.
- *Propose Compensation Change* business process.
- Third-party integrations.

In-progress *Change Job* events can block a worker's processes from initiating or completing.

Some business processes initiate *Change Job* and might require specific business process definitions to function. Example: *Swap Positions*.

Reporting

Add the Change Job task to the My Team Management dashboard to help managers track and manage job changes and time-sensitive tasks for their teams.

Add the Start Job Change report to the worker profile to enable users to launch relevant job changes for a specific worker.

You can use the View Document Template Details report to view document templates created with Workday Docs.

Integrations

- You can use the `jobChanges` REST API to start and submit job changes. You can update worker information, such as:
  - Location.
  - Business Title.
  - Job Profile.
  - Position.
  - Job Classification.
- You can use the *Change Job* EIB to perform a job change on an employee or contingent worker. This can include changing worker-related information such as organization assignments, compensation changes, pay groups and locations. When you view a change job event created by the EIB, the event displays based on your configuration on the Change Job template with the Change Job initiating action.

Connections and Touchpoints

Change Job events can touch many other functional areas in Workday, including:

Features	Consideration
Benefits	Changes to a worker’s position could trigger the *Change Benefit Elections* business process.
Compensation	Changes to a worker's position, location, job profile, or other position attributes may impact compensation. This includes modifications to Compensation Grade, Grade Profile, or the addition or update of Compensation Plans.
Onboarding	You can initiate internal onboarding events when you make a job change to a worker’s position attributes, such as location or company.
Payroll	Job changes enable you to change a worker's information which can affect their payroll and benefits processing. Some examples of job changes that impact payroll include position, location, organization, and compensation changes.
Time Tracking	When you change the worker's position using the *Change Job* business process, Workday adds the new position to time blocks from the effective date of the change.

Features	Consideration
Recruiting	Recruiting transactions for internal candidates route to Change Job once the worker reaches the*Ready to Hire*phase. If an internal candidate is moving to a: • Different supervisory organization, Workday uses the template with Request Transfer as the initiating action. • Within their own supervisory organization, Workday uses the template with Change Job as the initiating action.
Workday Docs	You can create document templates in Workday Docs to include on generate document steps for Change Job.

A Change Job event can impact multiple functional areas at once. Example: When you transfer a worker to another country, the location change can affect their benefits, compensation, and onboarding information.

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.

Related Information

Concepts

Concept: Workday Docs

Setup Considerations: Manager Insights Hub on page 2933

Tasks

Steps: Set Up Workday Docs

Reference

Improve the Change Job Experience for Managers

Reference: Change Job Initiation on page 872

2024R1 What's New Post: Change Job Templates New User Experience for Consolidated Templates

2024R1 What's New Post: Change Job Templates New User Experience

Steps: Set Up Job Changes

Prerequisites

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Review setup considerations for the *Change Job* business process.

Context

Set up the *Change Job* business process to make staffing changes for employees and contingent workers, including:

- Contract changes.
- Demotions.
- Lateral job changes.
- Location changes.
- Promotions.
- Transfers.

Steps

1. Steps: Set Up Security for Change Job on page 853.
2. Set Up Reasons for Job Changes on page 857.
3. Set Up Change Job Templates on page 849 .

   You can configure compensation templates that map to a Change Job reason. Workday uses that template on the Change Job template.
4. (Optional) Access the Edit Tenant Setup - HCM task to configure these Staffing options:

   - Change Job Default Headcount Option
   - Change Job Use Default Organizations for Job Management
   - Change Job Default for Move Team with Manager
   - Enable Job Overlap for Vacating Positions
   - Automatically Select Is This Position Available for Overlap on Vacating Events
   - Enable Job Overlap on Position Restrictions
   - Allow Override of Restrictions on Staffing Events

   See ../../../../manage-workday/tenant-configuration/tenant-setup/dan1370797339945.dita.
5. Configure the *Change Job* business process in the Staffing functional area.

   For a list of allowed actions and approval options in *Change Job*, access the Business Process Configuration Options report. Your business process steps must follow a specific order to avoid errors. Ensure that:

   - *Change Job* is first in the process order.
   - Each consolidated subprocess is an action step on the *Change Job* business process definition, including the *Change Organization Assignment* step. You must add these steps before the completion step.
   - *Propose Compensation Change* is last in the process order.
   - There's a review step for *Propose Compensation Change* in the *Change Job* business process definition to prevent unreviewed compensation changes.
   - To ensure correct routing for the *Request Transfer* initiating action, include review steps for both the current and receiving manager. Assign a review step to an HR Partner or other role that has security access to all sections in the *Change Job* business process. This step ensures that someone reviews all job changes, including details which managers might not be able to view.

   Some action steps have Workday delivered condition rules. Example: You create an action step for *Change Superior Organization*. Workday applies the following condition rule: *Is Move Manager's Team selected or if it is a web service request, and if there are subordinate organizations to be moved.*

   See Steps: Configure Business Process Definitions.
6. (Optional) Set up consolidated templates if you want to initiate the configured subprocesses as part of the Change Job workflow.

   - From the related actions of the Change Job business process type, select Business Process> Configure Consolidated Template. You can configure Assign Employee Collective Agreement, Change Job, Change Organization Assignments for Worker, and Propose Compensation Change. Ensure that:

- Change Job is first in the process order.
- If you configure Propose Compensation Change, ensure that it's last in the process order.

- On the *Change Job* business process definition, ensure that:
    - Each consolidated subprocess is an action step on the *Change Job* business process definition. You must add these steps before the completion step.
    - There's a review step for *Propose Compensation Change* in the *Change Job* business process definition to prevent unreviewed compensation changes.
    - You use the Business Process > Configure Consolidated Approval related action from the step to create a single approval step. The Consolidated Approval step comes after the last subprocess that's included in the consolidated approval.

Security: These domains in the System functional area:

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

You can initiate the configured subprocess as part of the Change Job workflow. The approval step for the Change Job event includes all consolidated subprocesses. You receive all events on the template as 1 task in My Tasks. Consolidated templates might enable workers to see events that:

- Aren’t relevant to them.
- Are only relevant for workers based in other locations.

7. (Optional) Set Up Rule Based Consolidated Templates for Job Changes on page 859.

    You can create multiple consolidated templates with condition rules for the *Change Job* business process.
8. (Optional)../../../../manage-workday/business-processes/manage-business-processes/ala1404761315058.dita.

    You can enable attachments on the *Change Job* business process so that you can attach documents to Initiation and Action steps.
9. (Optional) Steps: Set Up Defaults for Change Job Fields on page 855.
10. (Optional) Steps: Enable Machine Learning Recommendations for Change Job on page 863.
11. (Optional) Enable autocomplete for subprocesses for the *Change Job* business process definition.

    Workday recommends that you don’t enable autocomplete on the default definition for the *Change Job* business process. Example: The *Change Job* is coming through a Recruiting event.

    See Set Up Security to Autocomplete Staffing Events on page 523.
12. (Optional) Set up Workday Assistant for Staffing.

    You can initiate job changes through the Workday Assistant chatbot in:

    - Your Workday tenant.
    - Workday for Microsoft Teams.
    - Workday for Slack.

    See Steps: Set Up Workday Assistant for Staffing on page 524.
13. (Optional) Set optional fields as hidden, required, or not enterable on the Change Job template.

    These functional areas are available for the *Change Job* business process:

    - Change Job
    - Change Organization Assignments for Worker

    Workday only requires or hides the field if your template configuration includes the field. Example: You require the Employee Type field. Your change job template configuration hides the

Administrative Details section. The initiator doesn't see the Employee Type field, because that section is hidden.

If you hide the Close the current position? field using the Configure Optional Fields task, it will still display in the enhanced user interface. To hide the field, you must remove the What Do You Want To Do With This Person's Current Position? field from the Position Fields to Display field on the Maintain Change Job Templates task.

See Hide or Require Optional Fields.

14. (Optional) Create Custom Notifications.

    Set up email notifications to personal or work email addresses.

    You can override the email template. If you use Notification Designer, you can create a template and enable it for the *Custom Business Process* notification category. You can use the notification template to send notifications when using the *Change Job* business process.

15. (Optional) Maintain Localization Settings on page 144.

    These fields use the proposed location instead of the current location for any staffing transaction:

    - Additional Job Classifications
    - Work Shift
    - Work Space

16. (Optional) Configure help text for change job.

    You can create:

    - Field-level support text in the UI using QuickTips. See../../../../manage-workday/guidance-workspace/steps--manage-the-guidance-workspace.dita.
    - Help text for specific steps. As a related action on a Change Job business process step, select Business Process > Maintain Step Help-Text. When a user accesses a Change Job, they'll see this text at the top of the page for the applicable step. Select a condition rule to display different help text to different audiences.

17. (Optional) Set up countries tracking working time.

    See Steps: Set Up Working Time Localized Fields on page 550.

18. (Optional) Add Worklets to Business Processes.

    Configure embedded worklets to display when users complete a *Change Job* business process, including on subprocess steps.

19. (Optional) Steps: Set Up Swap Positions on page 814.

20.

Result

View job changes on worker profiles and in Workday standard reports.

- Job changes display the reason type in a worker's history.
- Staffing reports filter *Change Job* events by the reason type.

Next Steps

You can cancel, rescind, or correct *Change Job* events. To make out-of-order corrections, use the *Edit Position* business process.

The access that the initiator has to a Supervisory Organization determines the visibility of many *Change Job* fields. As a result, Workday might dynamically hide fields and sections from the initiator.

Managers can initiate job changes across Workday. They can track the progress of job changes using the My Team Management dashboard.

Set up out of order insertions for the *Change Job* business process.

Related Information

Concepts

Setup Considerations: Job Changes on page 838

Setup Considerations: Autocomplete Staffing Events on page 519

Setup Considerations: International and Domestic Assignments on page 893

Tasks

Steps: Set Up International and Domestic Assignments on page 897

Reference

Improve the Change Job Experience for Managers

Reference: Change Job Initiation on page 872

Reference: Edit Tenant Setup - Assistant

2024R1 What's New Post: Change Job Templates New User Experience for Consolidated Templates

2024R1 What's New Post: Change Job Templates New User Experience

Set Up Out of Order Insertion for Job Changes

Prerequisites

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Set up the *Change Job* business process.

Context

You can configure the *Change Job* business process so that you can insert position and job change events before other completed staffing and end-employment events and their respective subprocesses.

Note: Review information about out of order insertions for job changes before setting up.

See: Concept: Out of Order Insertions for Job Changes

You can use the *Put Functionality for Staffing Transactions* web service to opt-in or opt-out of out of order *Change Job* functionality. You can use the *Get Functionality for Staffing Transactions* web service to retrieve the opt-in or opt-out status.

Steps

1. Access the Maintain Functionality for Staffing Transactions task.

   Security: Set Up: *Staffing* domain in the Staffing functional area.
2. Select *Change Job* in the Business Process Type field.
3. As you complete the task, consider:

Option	Description
Functionality	Add rows for the Insert Out of Order Events and Insert Out of Order Events (Web Services) options.
Enabled for	The All Security Groups option enables access to every security group configured on the business process security policy, for the relevant action. The Restricted Security Groups option enables you to select any security group in the Security Groups column. Workday only grants access to the security groups that are on the

Option	Description
	corresponding action on the business process security policy.
Security Groups	Workday recommends that you select security groups with: • Full access to workers' event history. • Permissions on the Start Change Job initiating action on the *Change Job* business process security policy.

4. Access the Maintain Change Job Template task.

   Workday recommends adding a new *Change Job* template for out of order insertions that exposes all fields. This ensures that you can easily review and update all fields to match your specified effective date. Workday recommends selecting Apply this Template to Review and Approve Steps.

Result

You can initiate out of order *Change Job* events by selecting the Start Job Change task from the related actions menu of the relevant job or position. You can find a list of jobs or positions on the Worker's History by Category or Job History tab on the worker profile.

When an out of order insertion vacates a job, position, or supervisory organization, initiate it from the related actions menu of the job or position that precedes the one that you're inserting.

Next Steps

Access the Out of Order Job Changes report to audit out of order changes and their downstream impacts.

Related Information
Reference

2025R2 Feature Release Note: Out of Order Change Job

Set Up Change Job Templates

Prerequisites

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

- Configure the *Change Job* business process.
- Set up consolidated templates for the *Change Job* business process.
- Security: *Set Up: Staffing* domain in the Staffing functional area.

Context

Set up simplified job change templates that users such as managers can access through these initiating actions:

- Change Contingent Worker Details
- Change Job
- Change Location
- Request Transfer
- Start Job Change

You can specify the sections of the *Change Job* business process that certain security groups can view and edit when initiating through a Change Job template.

Steps

1. Access the *Change Job* business process security policy to assign security groups to the initiating actions.
   - Start Job Change: Enables users to initiate a change job for a worker. You can create multiple Change Job templates for this initiating action.
   - Change Job: Enables users to initiate a change job for a worker. You can create one Change Job template for this initiating action. This template is used when Change Job is initiated as a subprocess from other staffing transactions, such as Recruiting, and there's no organization change.
   - Change Contingent Worker Details: Enables users to change contract details for a contingent worker, such as editing their contract end date.
   - Change Location: Enables users to initiate a location change for a worker. To change a work space location without initiating any other staffing transactions, use the standalone *Change Work Space* business process instead.
   - Request Transfer: Enables users to initiate a transfer for a worker, such as when a manager is initiating a transfer for a worker in a different supervisory organization. Workday uses this template when Change Job is initiated as a subprocess from other staffing transactions, such as Recruiting, and there's an organization change.

     Example: The proposed manager can't initiate a Change Job for a worker outside of their organization, so instead they initiate Request Transfer. The request routes to the worker's current manager first, then comes back to the proposed manager to complete it.
2. Access the Maintain Change Job Templates task.
3. As you complete this task, consider:

Option	Description
Template Name	You'll see this name in: • The What do you want to do? prompt when you initiate the job change. • The Start Job Change report on the Worker Profile. Global search. .*In Use*You can inactivate any template, but you can't remove a template that's
Template Order	Configure the order of the change job templates based on how relevant they are for your organization. Users will see these templates in the order you configure when they launch a job change. Workday displays the first 5 change job templates as buttons on the Start Job Change report on the worker profile.
Select Reason for Template	You can configure one or more reasons for a template. When you configure multiple reasons, users can select one from the Why are you making this change? field. Based on your configuration, initiators might not see all the reasons. Example: You configured the Data Change reason on the Maintain Event Categories and Reasons task for Managers. You haven't configured the Demotion reason for Managers. You add both the Data Change and Demotion

Option	Description
	reasons on the template. When a manager accesses the template, they can only use the Data Change reason.
Template Help Text	This text displays beneath the What do you want to do? prompt when a user selects a template.
Apply this Template to Review and Approve Steps	Select to apply your template configuration to display on review and approval steps. This selection enables reviewers and approvers to see any fields that: • You've configured to display on the template. • Have changed in the background, even if they're not configured to display on the template. Example: You select Work Location in the Select Sections for Template prompt, and display the Location field. You don't select the Worker Time section (which contains the Scheduled Weekly Hours field). The initiator selects a Location with a different default Scheduled Weekly Hours. The Scheduled Weekly Hours field is updated in the background, and the reviewers and approvers see the updated field. If it's not selected, they'll see all Change Job fields.
Make this Template Inactive	Select to inactivate the template. You can't inactivate a template that's part of any in-progress change job events. You need to complete or cancel those events to inactivate the template.
Select Initiating Actions	You can specify where initiators can access specific templates: • Start Job Change • Change Contingent Worker Details • Change Job • Change Location • Mass Actions • Request Transfer • Workday Assistant / REST API
Select Condition Rules	Create or add existing condition rules to a Change Job template. The template displays if all condition rules are met when validated against the worker's current position.
Select Security Groups	Select the security groups that can initiate job changes through this template. The template

Option	Description
	displays for initiators with access to at least 1 security group.
Select Sections for Template	Select the sections of the *Change Job* business process that you want the user to see. Workday hides all other sections from the user. Subsequent steps in the business process definition will display normally and respect rules. Workday recommends if you select the Position section, you also select one of these fields from the Fields to Display section: Create Position, Position, or Select a Job Requisition for this change fields.
Fields to Display	Select the fields that you want to display. This feature doesn't apply to templates with Mass Actions configured in the Select Initiating Actions column.
Select Subprocesses for Template	Select the subprocesses that you want the user to be able to access Reviewers and approvers only see changed subprocess information when you configure the subprocesses on the template. When you configure multiple subprocesses, Workday doesn't use the subprocess order that you configure on the Configure Consolidated Template task. Instead, we display each subprocess in this order when configured: • *Assign Collective Agreement* • *Change Organization Assignment* • *Propose Compensation Change* Note: When you exclude the *Propose Compensation* subprocess from a template, ensure you include a review step for *Propose Compensation* in the business process definition. This step prevents unreviewed compensation changes.

4. (Optional) Access the Configure Profile Summary task to enable users to initiate a job change directly from a worker profile.

   Configure the Start Job Change report on Worker Profile.

   Security: *Staffing Actions: Change Job Date and Reason* domain in the Staffing functional area.

   Workday displays the first 30 characters of the first 5 templates you configured on the Maintain Change Job Templates task as buttons on the worker profile.

5. (Optional) Access the Configure Optional Field task to configure fields as hidden, view-only, or required.

   The *Change Job* business process is available for these functional areas:

   - Change Job
   - Change Organization Assignments for Worker

   If you hide the Close the Current Position? field using the Configure Optional Fields task, it will still display. To hide this field, you must remove the Opening section from the Sections to Display field on the Maintain Change Job Templates task.
6. (Optional) Access the Maintain Custom Labels task to customize the Start Job Change task and report labels.

Result

After you submit your changes on the Maintain Change Job Templates task, Workday displays a View Change Job Templates report that you can use to view templates, and download them to PDF.

Users will see the Make Changes button on review steps that lead to a change job workflow. Users can select Make Changes, Approve, or Send Back if there are no errors. If there are errors, Make Changes is the only option.

Next Steps

Users can delegate the Start Job Change initiating action. They can also access the initiating action on the My Team Management dashboard.

You can create reports and condition rules based on Change Job templates.

Related Information

Concepts

Setup Considerations: Manager Insights Hub on page 2933

Tasks

Steps: Set Up Job Changes on page 844

Reference

Steps: Set Up Job Changes on page 844

Reference: Change Job Initiation on page 872

2023R1 What's New Post: Change Job Templates for Review and Approval Steps

2023R2 What's New Post: Field Level Configuration for Change Job Templates

2023R2 What's New Post: Change Job Templates New User Experience

2024R1 What's New Post: Change Job Templates New User Experience for Consolidated Templates

2024R1 What's New Post: Change Job Templates New User Experience

2024R2 Feature Release Note: Change Job New User Experience for Workflow Steps

2024R2 Feature Release Note: Change Job Templates New User Experience for Initiating Actions and Multiple Reasons

Steps: Set Up Security for Change Job

Prerequisites

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Security: *Business Process Administration* or *Manage: Business Process Definitions*, and *Security Configuration* domains in the System functional area.

Context

Set up security to give managers and administrators access to the *Change Job* business process and subprocesses. The business process security policy specifies who can start or complete actions in the *Change Job* business process.

Steps

1. Edit Domain Security Policies.

   Enable these domain security policies:

Option	Description
Staffing functional area	*Staffing Actions* *Staffing Organizations* (for consolidated templates)
Advanced Compensation functional area (for consolidated templates)	*Add Compensation Management Plans* *Change Compensation Management Plans*

2. Access the View Business Process Template report.
3. Access the Edit Business Process Security Policy task.
4. Select the *Change Job* business process type.
5. Edit the business process security policy:
   a) Under Who Can Start the Business Process, select the security groups you want to grant access to for each initiating action.
      Since the *Change Job* business process has multiple initiating actions, you can limit the types of job changes available to different roles. Example: You can restrict access to the Change Contingent Worker Details task, but provide broader access to the Change Location and Request Transfer tasks.

      To hide tasks that aren't relevant, leave the security groups empty.

      You can only secure the Request Transfer initiating action to constrained role-based security groups because it’s only available to roles that don’t have access to the Change Job task for the selected worker.
   b) Under Who Can Do Action Steps in the Business Process, select the security groups you want to be able to complete review steps in the business process.
   c) Under Who Can Do Actions on Entire Business Process, grant permissions to the *HR Partner*, *HR Administrator*, or other relevant HR role in your organization.

      To ensure that business process validations run, you must also grant *View All* permission to the roles that can initiate the business process.
   d) Under Attachment Settings in BP Toolbar, define attachment security to restrict who can add, edit, and view attachments in business process events.
6. Grant security permissions to the *Staffing Actions: Change Job Date and Reason* domain.

   - Select Domain > Edit Security Policy Permissions from the related actions menu of the domain.
   - Grant access to the domain by selecting security groups and specifying whether they have permission to view or modify data.

7. (Optional) If you consolidate *Change Job* with *Assign Employee Collective Agreement*, *Change Organization Assignments for Worker*, and *Propose Compensation Change*, set up security for these processes.

   If you're consolidating Change Job with:

   - *Assign Employee Collective Agreement*, also grant security permissions to the *Worker Data: Collective Agreements* domain.
   - *Change Organization Assignments for Worker*, also grant security permissions to the *Staffing Organizations: Header* domain.
   - *Propose Compensation*, also grant security permissions to these domains:
     - *Add Compensation* and *Compensation Change* in the Core Compensation functional area.
     - *Add Compensation Management Plans* and *Change Compensation Management Plans* in the Advanced Compensation functional area.
8. Access the Activate Pending Security Policy Changes task to confirm your changes.

Next Steps

Access the Template-Driven Business Process Security report to confirm that the *Change Job* business process and domain security permissions arealigned.

Related Information
Concepts
Concept: Business Process Templates
Tasks
Activate Pending Security Policy Changes
Steps: Change Organization Assignments for Worker on page 912
Steps: Propose Compensation for Employees or Positions on page 1032
Steps: Set Up Job Changes on page 844
Steps: Manage Collective Agreements on page 647

Steps: Set Up Defaults for Change Job Fields

Prerequisites

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Configure the *Change Job* business process and security policy in the Staffing functional area.

Security: *Set Up: Staffing* domain in the Staffing functional area.

Context

You can set up defaulting for these fields on the *Change Job* business process:

- Business Title
- Job Title
- Time Type
- Work Shift

Based on your configuration, the defaults in the fields will update as the user edits these fields in the business process:

- Employee Type
- Job Profile
- Location
- Position

- Scheduled Weekly Hours

You can use these web services to load and retrieve the data in bulk:

- *Get Staffing Field Defaults*
- *Put Staffing Field Defaults*
- *Get Staffing Field Defaults Condition Rules*
- *Put Staffing Field Defaults Condition Rules*

Steps

1. Access the Create Change Job (All) Defaults Condition Rule task.

   Create a set of condition rules that you can use to determine when to populate a specific change job field.

   Example: You want to default the Job Title field based on what the user enters in the Job Profile field. You create a condition rule using the *Job Profile - Proposed* field.
2. (Optional) Create Calculated Fields.

   Create custom fields to use in staffing field defaults. Select these values on the calculated field:

Field	Value
Business Object	*Change Job*
Authorized Usage	*Staffing Field Defaults - Change Job*
3. Access the Maintain Staffing Field Defaults task.
4. Select the Change Job (All) tab.

   Create a row for each field that you want to create defaulting rules for.
5. Select the condition rules you created in the Condition Rule prompt.
6. Associate 1 or more condition rules for specific staffing fields in the business process and define the value that populates that field.

   As you complete this task, consider:

   - Defaulting applies to all change job initiating actions, and the review and approval steps. Defaulting doesn't apply when you correct a *Change Job* event.
   - Workday processes rules in the order they display in the grid. Once a field meets the conditions for a rule, Workday ignores any remaining rules for that field.
   - Users can override field defaults when completing the *Change Job* event.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
7. (Optional) Configure calculated fields in the Report Field.

   Note: You can't use calculated fields that contain sensitive data. Example: *Date of Birth*.

Result

During a *Change Job* event, Workday evaluates condition rules and applies defaults dynamically while users make changes to these fields:

- Employee Type
- Job Profile
- Location
- Position
- Scheduled Weekly Hours

Example

You want to default the Time Type field based on what the user enters in the Scheduled Weekly Hours field.

1. On the Maintain Staffing Field Defaults task, access the Change Job (All) tab.
2. Select the Add button.
3. Select *Time Type* as the Field.
4. Create a new row.
5. Access the Create Change Job (All) Defaults Condition Rule task from the Condition Rule prompt.
6. Click OK.
7. Enter *Scheduled Weekly Hours Less Than 35* in the Description field.
8. Select these values in the Rule Conditions grid:

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value	)
And		*Scheduled Hours - Proposed*	less than or equal to	Value specified in this filter	*35*	

9. Click OK.
10. Return to the Change Job (All) tab on the Maintain Staffing Field Defaults task.
11. Select *Scheduled Weekly Hours Less Than 35* in the Condition Rule column.
12. In the Value column, select *Part time* as the Specific Value

 Click OK.

 .

Related Information

Concepts

Steps: Set Up Job Changes on page 844

Tasks

Set Up Recruiting to Staffing Field Defaults on page 205

Set Up Reasons for Job Changes

Prerequisites

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Security: *Set Up: Staffing* domain in the Staffing functional area.

Context

Create custom reasons for job changes and map them to these Workday-owned change job types:

- *Data Change*
- *Demotion*
- *Lateral Move*
- *Promotion*
- *Transfer*
- *Swap Positions*

Based on your configuration, Workday filters the reasons that are available to the initiator depending on:

- Whether or not the initiator is a manager.
- What the worker type is of the person you are doing the change job for.

Workday uses the change job type to create a Display ID for the change job event. This Display ID displays in change job-related tasks when you submit a change job event, such as on My Tasks or Worker History. It provides additional context on the reason for the change. Example: *Data Change: John Smith*, *Lateral Move: Janet Smith*.

Steps

1. Access the Maintain Event Categories and Reasons task.
2. Select the *Change Job* event.
3. Create and organize reasons:
    a) Create a Reason Category. Categories display in prompts to help organize reasons on the *Change Job* business process.
    b) Create a Reason to display in selection lists.
    c) Map the reason to a Change Job Type:
        - *Data Change*
        - *Demotion*
        - *Lateral Move*
        - *Promotion*
        - *Transfer*
        - *Swap Positions*
    d) Select one or both of these check boxes to indicate that the reason applies to employees or contingent workers:
        - For Employees
        - For Contingent Worker
    e) Select Manager Reason if you want to display the reason to everyone in a manager role.
    f) Create additional reasons and categories as needed. We recommend keeping the list short to make selection easier.

Example

Reason Category	Reason	Change Job Type	For Employee	For Contingent Worker	Manager Reason
Demotion	Decrease in Responsibility	Demotion	X		
Data Change	Change Location	Data Change	X	X	X
	Change Job Details	Data Change	X	X	X
	Change Contract Details	Data Change		X	X
Lateral Move	Move to Another Position on My Team	Lateral Move	X	X	X
Promotion	Increase in Responsibility	Promotion	X		X
Transfer	Move to Another Manager	Transfer	X	X	X
Swap Positions	Training	Swap Positions	X	X	X
	Reorganization	Swap Positions	X	X	X

Related Information

Concepts

Concept: Condition Rules for Job Changes on page 870

Tasks

Steps: Set Up Job Changes on page 844

Set Up Rule Based Consolidated Templates for Job Changes

Prerequisites

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Set up the *Change Job* business process.

Security: *Business Process Administration* or *Manage: Business Process Definitions* domain in the System functional area.

Context

You can create multiple consolidated templates with condition rules for the *Change Job* business process.

Example: You want *Assign Employee Collective Agreement* to be a subprocess of *Change Job* only for workers based in the Netherlands. You create a condition rule that makes *Assign Employee Collective Agreement* only available to workers in the Netherlands. When a manager from Amsterdam initiates *Change Job*, the manager sees the employee collective agreement step.

Steps

1. Access the Configure Rule Based Consolidated Template task.
2. As you complete this task, consider:

Option	Description
Rule	You can only create rules that relate to the: • *Change Job* event. • Position. • Worker. Workday uses the first Rule Based Consolidated Template condition that applies. When no rules apply, Workday uses the default *Change Job* business process definition. Note: Ensure that condition rules reflect your requirements. Test all combinations of Change Job Templates, Rule Based Consolidated Templates, and *Change Job* business process definitions to validate expected outcomes.
Business Process Type	The order of these business process types dictates the order that Workday completes the subprocesses. For every business process type you select, ensure that the relevant subprocess is a step on the *Change Job* business process definition. The order of business process types in the consolidated template must match the order

Option	Description
	of subprocesses in the business process definition. Ensure that: • Change Job is first in the process order. • If you configure Propose Compensation Change, ensure that it's last in the process order.

Result

On consolidated *Change Job* templates, the subprocesses start automatically but cancel if you make no changes.

Worker history displays subprocesses as *Canceled*, but the *Change Job* process history displays different statuses for individual steps:

- Initiation: *Automatic Complete*.
- Review: *Manually Skipped*.
- Completion: *Automatic Cancel*.

Related Information
Tasks
Steps: Set Up Job Changes on page 844

Steps: Set Up Swap Positions

Context

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

A position swap in Workday enables you to select 2 or more workers and then move them into each other's positions by initiating a single Swap Positions business process transaction.

When completing a swap position, users can:

- Swap multiple workers at once, such as for mass reorganizations or worker rotation. Example: Moving retail managers from 1 store to another.
- Only swap position management positions.
- Select which positions to swap, if a worker has multiple positions.
- Select a worker multiple times in 1 swap to include several of their positions in the swap.
- Only swap workers with matching worker types. Example: You can't swap a contingent worker into an employee position.
- Not swap a position that uses internal Workday pay groups with a position that uses external pay groups.

Steps

1. Set Up Reasons for Job Changes on page 857.

   Create reasons on the Maintain Event Categories and Reasons task.

   a. Select *Change Job* in the Event field.
   b. Create reasons with *Swap Positions* selected in the Change Job Type column.

   To use the Swap Positions task, you must configure at least 1 reason with the *Swap Positions* Change Job Type.

2. Configure Rule-Based Business Processes.

   Configure these business processes and security policies in the Staffing functional area:

   - *Change Job*
   - *Change Organization Assignments for Worker*
   - *Swap Positions*

   When the Change Organization Assignments task is on the *Change Job* consolidated template, it must be the *Complete* step on the *Change Job* business process definition.

   When these events are on the *Change Job* consolidated template, they must be after the *Complete* step on the *Change Job* business process definition:

   - *Employee Collective Agreement*
   - *Propose Compensation*

   When you include the *Review: Receiving Manager* step on the *Change Job* business process definition, it must:

   - Be before the *Complete* step.
   - Have this Workday-owned If condition: *Initiating User isn't the same as the Processing User or Initiated by Request Transfer Task or Swap Positions?*

   The *Change Organization Assignments for Worker* business process definition must have the *Initiation* step as the *Complete* step.

   Don't place exit validations on the *Change Job* or *Change Organization Assignments* business processes, as they can prevent the position swaps from completing simultaneously.
3. Create Custom Business Processes.

   Configure the *Swap Positions* business process definition to include only an initiation step and review steps. Include the optional *Review Swap Positions* step to route to an approver before the swap completes. If you specify a role-based security group on the *Review Swap Positions* step, select the All check box, ensuring that all swaps within a list are approved simultaneously.

   You can enable managers to request position swaps for their workers with the Request Swap initiating action. Configure the *Swap Positions* business process definition to include the *Review Swap Positions: Current Manager* step and select the *Current* option in the Routing Modifier column. This setting ensures that the managers of both employees can approve the swap before it occurs.

   To ensure that swap requests, ignore the *Review Swap Positions* step, create an entry condition rule using the Initiated from Request Swap report field.

   We recommend that you create only 1 *Swap Positions* business process definition per tenant. This practice ensures that position swaps can complete across all organizations.
4. (Optional) Embed a worklet on the initiating action of the *Swap Positions* business process to include position data from custom reports in position swap events.

   Configure the worklet prompt to include the Position field on the *Swap Positions Task* business object. This configuration enables the worklet to display the positions included during initiation of the swap, as well as information related to those positions. The worklet displays on the second page of the Swap Positions task.

   See ../../../worklets-and-reports-for-human-capital-management/dan1370796491407.dita.

5. Edit Domain Security Policies.

   The *Staffing Actions: Swap Positions - View Events* domain controls access to the View Swap Positions Events report.

   The *Swap Positions - List* domain controls access to these tasks and reports:

   - Create Swap Positions List task.
   - Edit Swap Positions List task.
   - Find Workers for Swap Positions report.
   - View Swap Positions List report.

Result

The *Swap Positions* business process initiates the Change Job business process to perform the job changes for the swapped workers. When you swap workers between organizations, the *Change Job* business process also initiates the *Change Organization Assignments for Worker* business process.

Next Steps

Access the Create Swap Positions List task to select workers and add them to lists for future position swaps. Use these lists to prepare for mass position swaps ahead of time. Anyone with access to a list can swap the workers in that list, including workers that they don't otherwise have permission to view.

Access the Swap Positions task to perform position swaps. Each time you initiate a position swap, you can either select a previously created list or select workers individually within the task.

Workday automatically completes the *Change Job* business process based on the information from each filled position. Workday also provides validations to ensure that all positions swap at the same time. When 1 position can't swap, no part of the transaction can complete.

Position swaps display in worker histories as job and organization assignment changes. You can view changes using the View Swap Positions Events report.

Steps: Set Up Mass Action Workbooks to Initiate Change Job

Context

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

You can set up mass actions to initiate the *Change Job* business process in bulk for up to 1000 workers.

Steps

1. Set up mass action workbooks.

   Steps: Set Up Mass Actions.
2. Edit Business Process Security Policies.

   Configure security permissions for the *Change Job* and *Change Job (Mass Action)* initiating action on the *Change Job* business process policy.

   Configure security permissions for the *Change Organization Assignments for Worker (Mass Action)* and *Change Organization Assignment (REST)* initiating actions on the *Change Organization Assignments for Worker* business process policy.

   Ensure that these security groups are also on the *Mass Action Event* business process security policy.

   Ensure that you add the *Complete Mass Action Event* step and mark it as the completion step.
3. (Optional) Add additional facets to the Launch Mass Change Job report. To add additional facets, copy the delivered Launch Mass Change Job standard report to a custom report, and add any additional filters to the report definition.

4. (Optional) Create Custom Reports.

   Create or edit a custom report that has a data source containing positions or position restrictions. You can use the report or report filter to populate up to 1000 workers in the workbook using the Launch Mass Action Event task.
5. (Optional) Create or edit a search report that has a data source containing positions or position restrictions. You can select workers in the search report to populate up to 1000 workers in the Launch Mass Action Event task.

   Ensure that you select *Launch Mass Action Event* from the Mass Action column on the Advanced tab of the search report.

   See Steps: Create Search Reports.

Next Steps

Access the Launch Mass Change Job report, the Launch Mass Action Event task, or a configured search report to initiate the *Change Job* business process in bulk.

Related Information

Concepts

Setup Considerations: Org Studio and Mass Actions

Setup Considerations: Job Changes on page 838

Reference

Steps: Set Up Job Changes on page 844

Steps: Enable Machine Learning Recommendations for Change Job

Prerequisites

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

You can enable the *Change Job* business process to use machine learning and automatically provide relevant recommendations for these fields:

- Change Job Reason

- Compensation Plan
- Cost Center
- Job Profile
- Location

Once you opt in, it takes approximately 2 weeks for Workday to process your data and present recommendations. During this time, the Recommendations folder on the Job Profile field might be empty. To use the most relevant data, we recommend that you enable this feature in your production tenant. This feature might not give good recommendations for workers with limited job change history, or a new cost center, job profile, or location.

We don't support translations for this feature.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.

   a. Access the Innovation Services Opt-In task.
   b. Navigate to the Cross Application Services category.
   c. Select the Intelligent Core Generally Available Features check box.
   d. Click OK.
   e. Access the Maintain Innovation Services Data Selection Opt-In task.
   f. In the Innovation Services Valid for Maintain Data Opt-In field, select the Cross Application Services Intelligent Core Generally Available Features category.
   g. Click OK.
   h. In the View Data Categories for Feature field, select *Machine Learning Recommendations for Change Job*.
   i. Opt-in to the relevant categories.
   j. Click OK.
2. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality. The default region for data processing is the U.S.

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.
3. (Optional) Hide machine learning suggestions for specific fields.

   Access the *Change Job* business process type on the Maintain Functionality for Staffing Transactions task.

   Example: You want to hide machine learning suggestions in production while Workday processes your data.

Result

Workday will begin using machine learning to display and suggest relevant values when users complete a job change.

Related Information
Tasks
2024R1 What's New Post: Machine Learning Recommendations for Change Job
Workday Community: Recommendations for Change Job AIFact Sheet

Initiate Change Job in Mass Action Workbook

Prerequisites

- Configure the *Change Job* business process.
- Set up mass action workbooks for changing jobs.
- Security: *Mass Action Events* domain in the System functional area.
- (Optional) Enable change job templates for mass actions in the Maintain Change Job Templates task.

Context

You can initiate the *Change Job* business process in bulk with a mass action workbook. Mass change job also includes *Change Organization Assignments for Worker* as a subprocess.

You can add up to 1000 contingent workers and employees to the workbook by:

- Using the Launch Mass Change Job report.
- Selecting a report in the Launch Mass Action Event task.
- Using a search report to access the Launch Mass Action Event task.
- Adding them manually in the workbook.

Note: Even if certain fields such as Job Classification, Work Shift, or Work Space are displayed in a workbook, they respect the configuration in Maintain Localization Settings. Example: If you require Work Shift in Configure Optional Fields but disable in Maintain Localization Settings, you can't enter values for Work Shift in workbooks. Similarly, if you hide Work-Study in Configure Optional Fields and require for a job profile, you can't enter values for Work-Study in workbooks.

Steps

1. Access the Launch Mass Change Job report.
2. Select the population intended for mass change job and click Launch Mass Action.
3. Access the Launch Mass Action Event task.
4. As you complete the task, consider:

Option	Description
Effective Date	Select the date when mass change job takes effect.
Do you want to use the next pay period?	If selected, this field takes priority over Effective Date.
Change Job Template	For constrained security groups, Workday displays templates based on access permissions.

5. After the workbook generates, click Open Workbook.
6. Complete the details in the workbook using the prompts and validation messages.

   You can update and enter specific fields for workers, if needed. Example: You enter a Proposed Supervisory Organization for the workers.
7. Click Validate All.

8. Resolve errors and submit the workbook.

   You can submit a workbook with errors. Any rows with errors remain in the workbook instead of initiating the *Change Job* business process. You can access the workbook later to resolve and submit the remaining rows.

   Note: Mass actions using workbooks can't apply the Condition Rules Applied options of change job templates configuration.

Result

The *Change Job* business process initiates for the relevant workers in the workbook. Any other steps on the business process route for completion.

Related Information
Tasks

Steps: Set Up Mass Actions

Steps: Set Up Mass Action Workbooks to Initiate Change Job on page 862

Concept: Move Manager's Team

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

When you use the *Change Job* business process to move a manager to a new organization, you can also move the teams that report to that manager. Workday only displays the teams that are eligible to move. You either can move all eligible teams or leave all teams behind. You can't pick teams or individual team members that you want to move.

Moved teams retain their current:

- Headcounts.
- Job openings.
- Job requisitions.
- Subordinate organizations.

After you submit the job change, Workday initiates 1 *Assign Superior* subprocess for each eligible team, with its own workflow and approvals. You can cancel, rescind, or correct the individual *Assign Superior* subprocesses as needed. However, you can't reverse the original decision to move, or not move, a manager's teams by correcting *Change Job* events. To reverse that decision, you would have to cancel or rescind the *Change Job* business process and start again.

You don't see the option to move teams when you:

- Don’t configure the *Change Superior Organization* step on the *Change Job* business process.
- Move a worker who isn't a manager.
- Keep a manager in the same supervisory organization.
- Move a manager who also manages an organization that is a superior of the proposed organization.
- Move a manager whose supervisory organization has an organization hierarchy event in progress. Example: An in-progress *Create Subordinate* event.
- Move a manager whose team is in a subordinate organization that isn't part of their supervisory hierarchy. Example: The manager is part of Supervisory Organization 1, which has Subordinate Organizations A, B, and C. However, the manager's team is part of Subordinate Organization D.

To set up the option to move teams modify the default definition for the *Change Job* business process to include 2 additional steps:

-
- *Assign Roles - Change Assignments for Worker*
- *Change Superior Organization*

Both steps must come after the *Change Job* completion step.

Step	Details
(Optional) *Assign Roles - Change Assignments for Worker*	Ensures that the worker has the manager role before you move the manager's teams. All of the worker's previous roles automatically populate, including the manager role. You can remove the default role assignments, add new roles, or reassign roles as needed. Alternatively, you can use the *Copy Role Assignments* step for Job Management organizations when you have the Change Job Use Default Organizations for Job Management check box enabled. Both *Assign Roles - Change Assignments for Worker* and *Copy Role Assignments* must come before the *Change Superior Organization* step.
Change Superior Organization	Workday suggests that you include an approval step in the *Assign Superior* business process definition; otherwise the step completes automatically as part of the *Change Job* workflow. Ensure that you grant permission on the *Approve* action for the *Assign Superior* business process as well.

To populate *Yes* automatically on the This person is a manager. Do you want to move their teams with them? field, you can select the Change Job Default for Move Team with Manager check box on the Edit Tenant Setup - HCM task.

Related Information

Concepts

Concept: Assign Roles

Reference

Steps: Set Up Job Changes on page 844

Concept: Access to Job Profiles

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

The *Change Job* business process provides access to job profiles and related compensation data based on these considerations.

Availability of Hiring Restrictions

When you use the stand-alone *Change Job* business process, you can access job profiles if restrictions exist, and you meet those restrictions. If restrictions don't exist, you can access job profiles only if:

- A worker remains in the same position.
- You move a worker to a new position, and you select the Allow Override of Restrictions on Staffing Events check box in the Edit Tenant Setup - HCM task.
- There aren't any restrictions, in which case, you can access all job profiles.

Compensation Details

Because compensation eligibility rules are often linked to job profiles, Workday enables you to restrict access to compensation data by creating hiring restrictions. If you consolidate *Change Job* with *Propose Compensation Change*, you can view compensation details if you meet at least one of these conditions:

- Hiring restrictions don't exist.
- Hiring restrictions exist and you select a job profile that meets those restrictions.
- Hiring restrictions exist and you have permission on the *Staffing Actions: All Job Profiles with Compensation* domain.

When you configure compensation details to display based on supervisory organization, Workday only uses the proposed supervisory organization.

Job Requisitions

If you use job requisitions, you can't select a different job profile for a worker who remains in the same position. Update the job requisition or the hiring restrictions to include the additional job profile before you launch the Change Job task:

- If the worker's position has an open job requisition, use the Edit Job Requisition task to add other job profiles to the requisition.
- If the worker's position doesn't have an open job requisition, use the Edit Position Restrictions task to add other job profiles to the hiring restrictions.

Optionally, you can select the Allow Override of Restrictions on Staffing Events check box in the Edit Tenant Setup - HCM task. This setting enables you to access job profiles that aren't part of the hiring restrictions on the job requisition.

Related Information
Reference

Steps: Set Up Job Changes on page 844

Reference: Hiring Restrictions in Change Job on page 873

Concept: Worker Transfers

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

You can use the *Change Job* business process to transfer a worker to a different organization. The *Change Job* business process combines steps into a single workflow to:

- Route the business process steps.
- Determine organization roles who're responsible for those steps.
- Assign default organizations to the worker.

Business Process Step Routing

When editing steps on the *Change Job* business process definition, administrators can use specific group routing to specify whether the security group is for the organization of the current or proposed position. When you don't provide specific group routing instructions for steps in the *Change Job* business process, Workday automatically routes the business process steps to roles in the worker's proposed organization.

You can consolidate subprocesses within the *Change Job* business process type so that tasks from the consolidated subprocesses initiate at the same time. When you consolidate the subprocesses, Workday:

- Uses the specific group routing that you configure directly on the subprocesses.
- Doesn't apply the specific group routing that you configured on the *Change Job* business process to the subprocesses.
- Uses the specific group routing that you configured on the *Change Job* business process for the *Change Job* web service.

Step Routing to Organization Roles

When you transfer a worker to a different organization, Workday routes the business process steps to the organization roles based on information included in the *Change Job* business process.

Business Process Details	Step Routing
The *Change Job* includes routing modifiers on specific steps.	You can select whether the step routes to the Current or Proposed role, such as the current HR Partner.
The *Change Job* includes the Proposed Supervisory Organization.	Workday routes the business process steps to the: • Default organizations associated with the proposed supervisory organization. • Location hierarchy associated with the primary location of the proposed supervisory organization.
The *Change Job* includes the: • Proposed Supervisory Organization • Position	Workday routes the business process steps to the: • Organizations associated with the proposed position. • Location hierarchies associated with the location hiring restrictions of the proposed position.
The *Change Job* includes the: • Proposed Supervisory Organization • Position • Location	Workday routes the business process steps to the: • Organizations associated with the proposed position. • Location hierarchy associated with the proposed location.
The *Change Job* includes the: • Proposed Supervisory Organization • Position • Location • Organization Assignments	Workday routes the business process steps to: • All proposed organizations. • The location hierarchy associated with the proposed location.

Default Organization Assignments

When you run the *Change Job* business process, the *Change Organization Assignments for Worker* subprocess assigns default organizations differently for each staffing model. Organization assignments in both the job management and position management staffing models populate from the job requisition when available. Otherwise, organization assignments:

- In job management populate from the current job or from the proposed supervisory organization, based on whether you selected the Change Job Use Default Organizations for Job Management check box on the Edit Tenant Setup - HCM task.
- In position management populate based based on availability, in this hierarchy:
    - Proposed job requisition, if it's different from the current job requisition.
    - Proposed position, if it's different from the current position.
    - Proposed supervisory organization, if it's different from the current supervisory organization.
    - Current position.

When you consolidate *Change Job* with *Change Organization Assignments for Worker*, each time you modify the proposed supervisory organization, Workday re-evaluates the default organizations. When you run the *Change Organization Assignments for Worker* business process independent of the consolidated template, the default organizations don't change after initial selection.

Related Information
Reference
Steps: Set Up Job Changes on page 844

Concept: Promoting Workers to Managers

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

You can promote a worker into a managerial role and automatically create their supervisory organization using the *Change Job* business process. The worker must belong to an organization that uses the job management or position management staffing model. To set up this option:

- Add a *Create Subordinate* step after the completion step in the *Change Job* business process.
- Add a condition rule that determines when to initiate the step. Example: Change Job Reason = *Promotion*.
- Assign the step to an HR role.

After the *Create Subordinate* subprocess completes, Workday:

- Creates a supervisory organization as a subordinate to the worker's current organization.
- Assigns the worker to the Manager role.
- Applies hiring restrictions from the parent organization (job management staffing model only).

If you rescind the *Change Job* business process, Workday doesn't rescind these subprocesses:

- *Create Subordinate*
- *Assign Roles*
- *Hiring Restrictions*

If you don't want to keep the new organization, inactivate it. Rescinding the *Create Subordinate* subprocess only removes it from the organization hierarchy.

Note: You can also use *Change Job* to launch the *Move to New Manager* business process. Use this option to create a supervisory organization and transfer a worker to a nonmanager in another organization without changing the nonmanager's current job or position.

Related Information
Tasks
Steps: Set Up Job Changes on page 844
Move Workers to New Managers on page 920

Concept: Condition Rules for Job Changes

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

You can add condition rules to the *Change Job* business process to determine which subprocesses can be initiated during a job change. Workday evaluates the condition rules based on the data you submit on the initiating page. Workday looks at the rules based on this order:

1. Condition rules.
2. Business process definition.
3. Your configuration on the Maintain Change Job Templates task.
4. Change job consolidated template.

Example: Condition Rule Setup

You add *Change Organization Assignments* as a subprocess to the *Change Job* business process. You create a condition rule for the *Change Organization Assignments* step to run only when a worker's location changes:

And/Or	Source External Field	Relational Operator	Comparison Type	Comparison Value
And	Location - Proposed	NOT exact match with the selection list	Value from another field	Location - Current

The implications of this condition rule:

1. Teresa's manager, Steve, accesses the Change Job task and changes Teresa's location on the on the initiating page. The template doesn’t include the *Change Organization Assignments* subprocess.
2. The condition rule on the *Change Organization Assignments* step determines that Teresa's location changed.
3. Steve reviews the Organizations section, changes Teresa's cost center, and submits the changes.
4. The process routes to an HR administrator for review, and the administrator approves the change.
5. Workday updates Teresa's location. Based on the condition rule on the *Change Organization Assignments* step, Workday also updates Teresa's cost center.

Related Information
Tasks
Steps: Set Up Job Changes on page 844
Create Business Process Condition Rules

Concept: Employee Contracts in Change Job Events

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

You can end an employee's existing contract and start a new contract in a single *Change Job* event. Add 2 consecutive *Maintain Employee Contract* steps to the *Change Job* business process definition. The Order of these steps must be consecutive. Example: You add two rows for the *Maintain Employee Contract* subprocess to the *Change Job* business process definition. You enter *a* in the Order field for the first row, and *b* in the other one.

This approach provides flexibility when you use the *Change Job* business process to transfer an employee to another position. A position can have only 1 active contract at a time, as determined by the contract end date. If the employee has an existing contract, you can end that contract and start a new one. The new contract reflects the changes to the employee's position, job profile, or location.

Maintain Employee Contract Steps

Workday displays the first *Maintain Employee Contract* step based on details from the worker's existing contracts:

Existing Employee Contract	Description
Status	If there's an existing employee contract that's: • Active, Workday updates the current contract. • Inactive, Workday starts a new contract.
Date	If the existing contract end date is before the effective date of the *Change Job* event, the contract details won't populate because the contract has

Existing Employee Contract	Description
	ended. You can add a new employee contract in the *Maintain Employee Contract* step. The effective date of the contract populates from the *Change Job* effective date. If you select a contract end date that's before the *Change Job* effective date, Workday updates the contract effective date to the same date.

Workday runs the second *Maintain Employee Contract* step when the:

- Order field is properly configured on the business process definition. This business process step must be after the previous one, and not parallel to it.
- *Change Job* process has an in-progress or completed *Maintain Employee Contract* subprocess.
- Contract in the first *Maintain Employee Contract* step has an end date that is before the effective date of the *Change Job* event.

When the Workday-owned condition rule is met, the step starts a new contract.

Web Service

The *Change Job* web service supports only 1 *Maintain Employee Contract* subprocess. If you use the web service to upload job changes that end existing employee contracts, create the contracts manually using the Add Contract task. The *Change Job* business process sends the second *Maintain Employee Contract* step to the assigned person's My Tasks.

Related Information
Tasks
Steps: Set Up Job Changes on page 844

Reference: Change Job Initiation

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Workday enables you to decide how you want administrators to initiate the *Change Job* business process for a worker. This discoverability enables you to make starting a job change more intuitive for users.

Option	Description
Global Search	Users can initiate the business process from these initiating actions through global search: • Change Contingent Worker Details • Change Job • Change Location • Request Transfer • Start Job Change Users can search for change job templates and launch the Start Job Change initiating action automatically from global search on desktop and mobile. Workday displays the change job template in global search when the user has access to the template.

Option	Description
Worker Profile	Users can launch change job templates from a worker profile by setting up the Start Job Change report as a profile card.
Related Actions	Users can initiate a Change Job from the related actions on the worker or position.
Dashboards	Add the Change Job task to the My Team Management dashboard to help managers track and manage job changes and time-sensitive tasks for their teams. Enable users to launch change job templates from dashboards on desktop by setting up the Start Job Change report as a worklet on these dashboards: • My Team Management. You can make it required on the Maintain Dashboards task. • Your custom dashboards. Go to the Enable Worklet for Dashboard task and select Start Job Change to enable it for the custom dashboards you choose. Then, you can add the Start Job Change worklet to the configured dashboards on the Maintain Dashboards task.
REST API	Use the `jobChanges` REST API to start and submit job changes. You can update worker information, such as: • Location. • Business Title. • Job Profile. • Position. • Job Classification.

Related Information
Concepts
2023R2 What's New Post: Launch Change Job Templates From Dashboards

Reference: Hiring Restrictions in Change Job

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Workday determines when to apply hiring restrictions in the *Change Job* business process by considering:

- How the tenant is configured for staffing.
- If the worker is moving to a different supervisory organization.
- If the proposed organization has a different staffing model.

Workday then decides whether to move the worker and position together, or to apply hiring restrictions against a new position.

Optionally, you can loosen restrictions on job profiles, locations, time types, and worker types by selecting the Allow Override of Restrictions on Staffing Events check box in the Edit Tenant Setup - HCM task.

Job Management

You can control whether workers get new positions when they move between job management organizations that have the same staffing model. In the Edit Tenant Setup - HCM task, select the Change Job Use Default Organizations for Job Management check box to place workers into new positions. Leave it unchecked to move workers and positions together.

If a worker stays in the same organization, Workday always keeps the same position regardless of the tenant setting.

Workday uses these criteria to apply hiring restrictions in job management organizations:

Tenant Setup: Change Job Use Default Organizations for Job Management	Organization Change?	Staffing Model Change?	Move Position?	Apply Hiring Restrictions?
Yes	No	No	Yes (based on same organization)	No
Yes	Yes	No	No (based on tenant setting)	Yes
Yes	Yes	Yes	No (based on staffing model change)	Yes
No	No	No	Yes (based on same organization)	No
No	Yes	No	Yes (based on tenant setting)	No
No	Yes	Yes	No (based on staffing model change)	Yes

Position Management

In position management organizations, Workday applies hiring restrictions as shown.

Organization Change?	Staffing Model Change?	Move Position?	Apply Hiring Restrictions?
No	No	Yes	No
Yes	No	Yes	No
Yes	Yes	No	Yes

Related Information

Concepts

Concept: Access to Job Profiles on page 867

Tasks

Steps: Set Up Job Changes on page 844

FAQ: Change Job

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Enhanced User Interface for Change Job

What happens if I don't uptake the new enhanced user interface for change job templates?	We made the decision to make the Change Job enhanced user interface the single default experience for all users because the new experience not only matches current functionality but it significantly extends job change capabilities. The new Change Job experience is a much more seamless and user-friendly experience and it streamlines the entire process from start to finish. We've seen that the new user experience has proven to both reduce time to transact and increase completion rates. For customers who have: • Not adopted Change Job Templates: Workday will automatically migrate your current *Change Job* business process into the necessary change job templates configured with the new user experience. Certain domain security configurations will be automatically converted. Additional review by your Administrator will be required to ensure capabilities meet current security requirements. • Adopted Change Job Templates but have not adopted the new user experience: Workday will automatically convert existing templates to use the new user experience. Customers will need to evaluate their security setup to make changes that align with their business needs.
Why is the Enable Enhanced UI for this Template check box grayed out?	On the Maintain Change Job Templates task, you either need to: • Select an initiating action. • Remove Location after Change from the Select Editable Fields for Start Page prompt.

Why doesn't the Position field show up on templates with the enhanced user interface enabled?	In the enhanced user interface for Change Job, we only display the Position field when you can edit it. The Position field is visible when: • The Position field is included in the change job template. • There's an open position in the supervisory organization. • The initiator has access to the proposed supervisory organization, such as through the Manager or Cost Center Manager roles. • The Move Position check box isn't selected. If these conditions aren't met, then Workday defaults the current position and doesn't display the Position field. For change job templates without an enhanced user interface, Workday displays the Position field even if there are no open positions for the supervisory organization.
Where is the Attachments section?	Change Job no longer has an Attachments section because it follows the standard business process framework. Any existing Change Job templates that you'd created that only contained the Documents section are no longer accessible. You must configure the Attachment Settings in BP Toolbar in order to include attachments in your Change Job transactions. See ../../../../manage-workday/business-processes/manage-business-processes/ala1404761315058.dita.
Why is the old experience showing up when I start a job change through Workday Recruiting?	If an internal candidate is moving to a new supervisory organization, Workday uses the *Request Transfer* initiating action. If you haven't configured a change job template for *Request Transfer* with the enhanced user interface enabled, Workday uses the old Change Job experience. If the internal candidate is moving within your own supervisory organization, we use the *Change Job* initiating action. If you haven't configured a change job template for Change Job with the enhanced user interface enabled, Workday uses the old Change Job experience.
What security configuration should I have for the new user experience?	For the new user experience, the Change Job business process uses a combination of the following to determine the change job information displayed to a user: • Business process security policy. • Template configuration. • Access to proposed supervisory organization. • Configuration of optional fields. • Localization settings.

- Security domain configuration for these domains, including view and modify access:
    - *Staffing Actions: Change Job Date and Reason*.
    - *Staffing Organizations: Header* for the *Change Organization Assignments* business process.
    - *Worker Data: Collective Agreements* for the *Assign Employee Collective Agreement* business process
    - These compensation domains for the *Propose Compensation* business process:
        - *Add Compensation Plans: Add Allowance*
        - *Add Compensation Plans: Add Bonus*
        - *Add Compensation Plans: Add Calculated*
        - *Add Compensation Plans: Add Commission*
        - *Add Compensation Plans: Add Hourly*
        - *Add Compensation Plans: Add Merit*
        - *Add Compensation Plans: Add Period Salary*
        - *Add Compensation Plans: Add Salary*
        - *Add Compensation Plans: Add Stock*
        - *Add Compensation Plans: Add Unit Salary*
        - *Compensation Change: Allowance*
        - *Compensation Change: Bonus*
        - *Compensation Change: Calculated*
        - *Compensation Change: Commission*
        - *Compensation Change: Compensation Basis Details*
        - *Compensation Change: Future Changes*
        - *Compensation Change: Guidelines*
        - *Compensation Change: Hourly*
        - *Compensation Change: Manage Compensation Basis*
        - *Compensation Change: Merit*
        - *Compensation Change: Period Salary*
        - *Compensation Change: Salary*
        - *Compensation Change: Stock*

	• *Compensation Change: Total Base Pay* • *Compensation Change: Unit Salary*
What type of help text can I configure on Change Job?	You can configure business process step help text, and QuickTips through the Guidance Workspace report. You can't configure help text for section groups, because section groups don't exist on the new change job experience. We plan to retire the Change Job template on the View Business Process Template report in a future update. We recommend that you use one of the other methods for configuring help text for Change Job. See Steps: Set Up and Manage the Guidance Workspace.

Related Information

Concepts

Article: Get Ready for the Enhanced Change Job Experience with 2026R1

Next Level: Preparing for the New Change Job User Interface

Multiple Jobs

Steps: Add Additional Jobs

Prerequisites

- Modify role-based security groups for multiple jobs.
- On the Edit Tenant Setup - HCM task:
  - Select *Multiple Jobs* in the Position Setup Options field.
  - Select an ID definition.
  - Configure job requisitions.
  - Specify whether to enable the override of hiring restrictions.
- Create categories and reasons for additional jobs with the Maintain Event Categories and Reasons task.
- Create hiring restrictions and positions in supervisory organizations.
- Hire the employee into a primary job or position.

Context

Place an employee with a primary job or position into another job or position. The additional job can have a different supervisory organization, compensation rate, pay rate, scheduled hours, location, or job profile.

Employees can have any number of additional jobs. You can't give additional jobs to contingent workers.

To include an additional job in Workday Payroll Interface integration output, associate the job with a pay group.

Workday Payroll for the UK only supports multiple positions in the same company.

If you don't configure *Change Organization Assignments for Worker* as a subprocess, Workday automatically hides the Organization Assignments section on the *Add Job* task. If you use a rule based business process definition where *Change Organization Assignments for Worker* is a subprocess of *Add Additional Job*, the Organization Assignments section always displays when you configure the Cost Center and Custom Organization fields to display. If you use either condition rules or rule based business processes, ensure you include *Change Organization Assignments for Worker* on all the *Add Additional Job* business process definitions.

Steps

1. Edit Business Process Security Policies.

   Configure the *Add Additional Job* business process and security policy in the Staffing functional area.
2. (Optional) Edit Business Processes.

   Add *Change Organization Assignments for Worker* as a subprocess of the *Add Additional Job* business process.
3. (Optional) Maintain Organization Types.

   Select the Show in Change Organization Assignments and Job Requisition check box for cost center and custom organizations.
4. (Optional) Hide or Require Optional Fields.

   In *Add Additional Job*, determine if you want to:

   - Display the Cost Center and Custom Organizations fields.
   - Hide or require other fields on the *Add Job* task.
5. Add Additional Jobs on page 879.

Related Information

Tasks

Create Role-Based Security Groups

Reference

Reference: Edit Tenant Setup - HCM

2021R2 What's New Post: Simplified Add Additional Job

Add Additional Jobs

Prerequisites

Configure the *Add Additional Job* business process and security policy in the Staffing functional area.

Context

You can add additional jobs for employees through global search, as well as the:

- Add Job button on the Jobs report of the worker profile.
- Related actions menu of an employee.

Steps

1. Access the Add Job task.
2. Select the Supervisory Organization for the additional job and the Employee.
3. Specify the Effective Date and Reason.

   - If you use job requisitions, the Effective Date must be on or after the Recruiting Start Date on the job requisition.
   - If you don't use job requisitions, the Effective Date must be equal to, or greater than the Hire Date on the position.

4. Complete the hiring details.

   Workday automatically populates many of these fields with values defined on the position or job requisition. If you use job requisitions, you can't change those values; update the job requisition itself.

Option	Description
Position	Select the appropriate position. This field doesn't display for organizations that use job management as the staffing model.
Employee Type	If you assign a worker to an employee type reserved for fixed-term employees, specify an End Employment Date in the Additional Information section.
Job Requisition	You can select a job requisition for either position management or job management organizations if you enable job requisitions for the tenant. For position management organizations, you can select a job requisition if the position selected is associated with a job requisition.
Job Profile	Select from the profiles you specified in the Create Position or Set Hiring Restrictions task, unless your tenant allows overrides.
Time Type	Select from the time types you specified in the Create Position or Set Hiring Restrictions task, unless your tenant allows overrides. Automatically populates from the job profile.
Location	Select from the locations you specified in the Create Position or Set Hiring Restrictions task, unless your tenant allows overrides.
Work Space	Select from the work spaces (such as building, floor, or cubicle) associated with the Location.
Pay Rate Type	Select from the pay rate types available for the country associated with the Location.

5. Complete the Working Time section.

   Workday initially populates many of these fields with values from the position or job requisition. As you complete the task, Workday updates the values.

Option	Description
Scheduled Weekly Hours	Populates from a rule when: • You've defined a working time rule. • The data populated on the task applies the rule. Populates from the Default Weekly Hours if there's no working time rule. Populates based on the position restrictions when:

Option	Description
	• You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position.
Location Weekly Hours	Displays the standard weekly hours associated with the Location.
Default Weekly Hours	Populates from a rule when: • You've defined a working time rule. • The data populated on the task applies the rule. Populates from the Location Weekly Hours field if there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position.
FTE	Calculated by dividing the Scheduled Weekly Hours by the Default Weekly Hours. This value displays as a percentage.
Specify a Paid FTE	Select the check box to specify paid full-time equivalent for a worker. Available when you enable Paid FTE on the Maintain Localization Settings task.
Paid FTE %	You can enter a percentage that overrides the FTE field for use in your Workday Compensation and Workday Payroll calculations. Available when you enable Paid FTE on the Maintain Localization Settings task.
Specify a Working FTE	Select the check box to specify working full-time equivalent for a worker. Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Working FTE %	Enter a working full-time equivalent percentage. Used in custom reporting. Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Work Shift	Available when you enable Work Shift on the Maintain Localization Settings task.

Option	Description
	Available when you selecte the Work Shift Required check box on the job profile. Define the work shifts for a location using the Maintain Work Shifts task.
Frequency	Select from the working time frequencies you specified on the Maintain Frequencies task. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Unit	Select from the preconfigured options of hours or days. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Value	Enter the duration of the working time in selected units. Automatically populates to zero. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.

6. Add any Additional Information.

   Workday automatically populates many of the Additional Information fields with values from the job profile.

Option	Description
Job Title	Automatically populates from the Job Profile.
Business Title	Automatically populates from the Job Title. You can control the display of business titles by enabling the *Worker Data: Business Title on Worker Profile* domain security policy in the Staffing functional area.
Job Category	Automatically populates from the Job Profile; not editable.
Job Classifications	Automatically populates from the Job Profile; not editable.
Additional Job Classifications	Select classifications as needed.
Company Insider Types	Select from the types associated with the Job Profile. Define company insider types with the Maintain Company Insider Types task; assign them to a job profile with the Edit Job Profile task.
First Day of Work	Automatically populates to the Hire Date.
End Employment Date	Available only if you assigned the worker to a fixed-term employee type in the Employee Type field.

Option	Description
Exclude from Headcount	Select this check box so that Workday doesn't count the position in headcount reports.

Result

Workday sets the status of the position and job requisition, if applicable, to *Filled*.

Next Steps

You can correct or reverse the addition of a job. From the employee's related actions menu, select Worker History > View Worker History. Then select either Correct or Rescind as a related action on the *Add Additional Job* event. If the worker's position had a job requisition, it reopens when you rescind the event.

If you configure the Add Probation Period step on the *Add Additional Job* business process and you correct the Effective Date of the *Add Additional Job* event, Workday:

- Recalculates the dates of the associated *Manage Probation Period* event.
- Doesn't recalculate the dates of the associated *Manage Probation Period* event with extended end dates or if recalculating the dates causes overlap with another *Manage Probation Period* event.

Related Information
Concepts
Setup Considerations: Autocomplete Staffing Events on page 519
Tasks
Maintain Localization Settings on page 144
Steps: Set Up International and Domestic Assignments on page 897
Add International and Domestic Assignments on page 899
Reference
2021R2 What's New Post: Simplified Add Additional Job

Ending Jobs

Prerequisites

- Configure the *End Additional Job* business process and security policy in the Staffing functional area.
- Create categories and reasons for ending additional jobs with the Maintain End Additional Job Categories task.
- Verify that the employee has no pending or completed staffing or organization changes that are effective after the end date of the additional job.

Context

End an employee's additional job or position. You can also end an employee's primary job if there is a related future-dated *Switch Primary Job* event.

Steps

1. Access the End Job task.
2. Select the Employee and the Job.
3. Complete the termination details:

Option	Description
End Date	This date must be on or after the effective date of the job.

Option	Description
	You can end a primary job if there is a related *Switch Primary Job* event after this date.
Close Position	You can't close positions that have an open job requisition. Leave blank if you want to keep the position open for staffing. This field is only available for position management organizations; with job management you can't open or close individual jobs.
Is this position available for overlap?	Specify whether another worker can fill the position before the incumbent departs. Available for position management organizations when job overlap is enabled in the Edit Tenant Setup - HCM task.
Last Day of Work	Automatically populates to the End Date.
Pay Through Date	Automatically populates to the End Date. Use this field in situations where severance pay continues past the position end date.
Notify By	Automatically populates to the End Date.

Result

If you didn't close the position, Workday sets its status to *Open*:

- If you use job requisitions, the position is available as soon as you have an open requisition.
- If you don't use job requisitions, the position is available the next day.

Next Steps

You can correct or reverse the ending of an additional job. From the employee's related actions menu, select Worker History > View Worker History; then select either Correct or Rescind as a related action on the *End Additional Job* event. If the position has an open job requisition, you can't rescind the event.

Related Information

Concepts

Concept: Workday Docs

Tasks

Terminate Employees on page 699

Steps: Set Up International and Domestic Assignments on page 897

Steps: Set Up End Jobs on page 702

End International and Domestic Assignments on page 904

Steps: Set Up Workday Docs

Reference

The Next Level: Overview of Primary Position Designation Impact

Switch Primary Job

Prerequisites

- Create reasons for switching a worker's primary job with the Maintain Event Categories and Reasons task.
- Configure the *Switch Primary Job* business process and security policy in the Staffing functional area. You can use *Switch Primary Job* as a standalone business process or as a subprocess for *Add Additional Job* or *Change Job*.
- Edit the security policy on the *Staffing Actions: Primary Job* domain to specify who can view or modify job information.

Context

Change the primary job designation for a worker with multiple jobs.

Workday Payroll for the UK doesn't support multiple jobs.

Steps

1. Access the Switch Primary Job task and select the Worker.
2. Select the Reason and Effective Date for the change.

   The effective date must be later than any previously completed primary job switches. After you enter the date, Workday displays the worker's Primary Job as of this date.
3. If the worker has more than 1 additional job, specify which job to designate as the Proposed Primary Job.

   The All Jobs section displays details about the worker's current primary job and additional jobs. Details include the supervisory organization, manager, location, job profile, pay group, company, employee type, scheduled hours, and full-time equivalent (FTE) percent.

   Note: If you change the effective date after the All Jobs section is populated, the job details don't refresh.

Result

In the worker's history, the *Primary Job Switch* event reflects the worker's primary and additional jobs before the switch, regardless of the event status.

When workers have in-progress on-cycle, on-demand, or retro pay results while you switch jobs, Workday assigns the *Requires Re-calculation* status to those results.

Next Steps

- To view job switch activity by organization for a given date range, access the Primary Job Switch History report.
- You can cancel or rescind the job switch, but you can't correct it. From the employee's related actions menu, select Worker History > View Worker History; then select either Cancel or Rescind as a related action on the *Primary Job Switch* event.

Related Information

Concepts

Concept: Security Roles for Switching a Primary Job on page 886

Concept: Workday Docs

Tasks

Add Additional Jobs on page 879

Steps: Set Up Job Changes on page 844

Steps: Set Up Workday Docs

Reference

The Next Level: Overview of Primary Position Designation Impact

Concept: Conditions for Switching a Primary Job

You can change a worker's primary job designation under these conditions.

Worker Conditions

The worker can't have:

- Another in-progress *Switch Primary Job* event.
- An in-progress *Termination* event.
- A completed *Termination* event that takes effect after the proposed switch date.

Job Conditions

The proposed primary job:

- Must be an active additional job as of the proposed switch date.
- Can't have an in-progress *End Additional Job* event.
- Can't have a completed *End Additional Job* event that takes effect after the proposed switch date.

You receive a warning if either job has an in-progress staffing event, such as *Change Job* or *Edit Position*. To determine whether the switch impacts other events, review the worker's history.

Business Process Conditions

- The proposed switch date must be after the last completed *Switch Primary Job* event.
- If *Switch Primary Job* is a subprocess for *Add Additional Job*, the proposed primary job must be the newly added job.
- If *Switch Primary Job* is a subprocess for a *Change Job* event on an additional job, the proposed primary job must be that additional job.
- When *Switch Primary Job* is a subprocess for *End Additional Job*, the step only initiates if the primary job is ending.

Payroll Conditions

- Both jobs must either belong to any Workday pay group OR belong to the *same* external pay group or have no pay group assigned.
- Neither job can have an in-progress *Assign Pay Group* event or a completed *Assign Pay Group* event that takes effect after the proposed switch date.
- The proposed switch date must be after the worker's last completed pay calculation result.
- The proposed job can't be an assignment if the position has a Workday Payroll pay group assigned.

Related Information

Tasks

Switch Primary Job on page 885

Concept: Security Roles for Switching a Primary Job

Actions in the *Switch Primary Job* business process are available to roles based on:

- The routing instructions in the *business process definition*.

- Their access rights to multiple job workers as defined for their security group:
  - Role has access to the positions they support
  - Role for primary job has access to all positions
  - Role has access to all positions

When the Role has access to the positions they support or Role has access to all positions:

- Roles associated with all jobs can initiate *Switch Primary Job* events.
- If there are no routing instructions, roles associated with all jobs can view *Switch Primary Job* events and receive approvals and notifications.
- If current group routing is specified, only roles associated with the current primary job receive approvals and notifications.
- If proposed group routing is specified, only roles associated with the proposed primary job receive approvals and notifications.

When the Role for primary job has access to all positions:

- Only roles associated with the current primary job can initiate *Switch Primary Job* events.
- Before the event completes, steps are routed to roles associated with the current primary job.
- After the event completes, steps are routed to roles associated with the proposed primary job and only these roles can view the event.

Related Information
Tasks
Create Role-Based Security Groups
Switch Primary Job on page 885

Reference: Impacts of Enabling Multiple Jobs

When you select *Multiple Jobs* on the Position Setup Options prompt in the Staffing section of the Edit Tenant Setup - HCM task, you can assign additional jobs to employees. This impacts these functional areas:

Functional Area	Task/Business Process	Impact	More Information
Payroll	• Create Earning • Edit Earning • Create Deduction • Edit Deduction	The *Position* calculation worktag becomes available. Enables you to make earnings and deductions position-based. You can't select the worktag for existing earnings and deductions.	Steps: Set Up Payroll for Multiple Jobs
Payroll	• Create Pay Balance • Edit Pay Balance • Create Pay Accumulation • Edit Pay Accumulation	The *Position* filter worktag becomes available. Enables you to make pay balances and accumulations position-based. You can't select the worktag for existing pay balances and accumulations.	Steps: Set Up Payroll for Multiple Jobs
Payroll	*Assign Pay Group*	The Position prompt becomes available	

Functional Area	Task/Business Process	Impact	More Information
		when you initiate *Assign Pay Group* as a stand-alone event for an employee with multiple positions.	
Absence	• Create Time Off Plan • Edit Time Off Plan • Create Leave Type • Edit Leave Type	The Position Based check box becomes available. This check box enables you to define position-based time off plans and leave types. If you don't enable the check box, plans continue to be worker-based. You can't enable the check box for existing plans.	Steps: Set Up Leave of Absence on page 2563 Steps: Set Up Time Off Plans on page 2276
Security	• Create Security Group • Edit Security Group • View Security Group	Enables you to define Access Rights to Multiple Job Workers for constrained role-based security groups. By default, Role has access to the positions they support is selected for new and existing security groups. There is no impact on the existing security permissions for users.	
Benefits	• Create Insurance Rate • Create Insurance Coverage • Create Health Care Rate • Edit Insurance Rate • Edit Insurance Coverage • Edit Health Care Rate • Create Benefit Credit • Edit Benefit Credit	The Combine All Jobs for Salary Source and Combine Benefit Jobs for Salary Source check boxes become available. These check boxes are displayed when creating a benefit credit only if you select *Salary Source Based Credit* as a benefit credit type. Enabling Combine All Jobs for Salary Source ensures that you can calculate the rates, coverages, and credits based on the sum of the salary source for all positions. Enabling Combine Benefit Jobs for Salary Source,	Steps: Set Up Multiple Jobs for Benefit Eligibility on page 1402

Functional Area	Task/Business Process	Impact	More Information
		ensures that you can calculate the rates, coverages, and credits based on the salary source for the positions designated as benefit jobs.	
Recruiting	*Ready for Hire*	The Staffing Action action step is required on the *Ready for Hire* business process. This step enables you to select *Add Additional Job* or *Change Job* for internal applicants. Configure this step when you enable *Multiple Jobs* but not using the *Add Additional Job* business process. This is when you're using the *Start International Assignment* and *End International Assignment* business processes to manage the international assignments.	

Reference: Impacts of Primary Position Designation

When you assign multiple positions to an employee, you need to designate one of the positions as the primary. Review the impact that the primary position can have on these functional areas:

- Absence Management and Time Tracking
- Absence Management
- Time Tracking
- Staffing
- Talent
- Compensation
- Benefits
- Workday Payroll for the U.S.
- Workday Payroll for the Canada
- Reporting
- Various

Absence Management and Time Tracking

Component	Impact
Holiday Calendars	Workday evaluates the Country / Country Region field for the primary position only. For international assignees where you need to base the holiday

Component	Impact
	calendar on the country of their additional position, we recommend creating separate holiday calendars. Make these calendars without the Country / Country Region field populated and with an eligibility rule that makes only the assignees eligible.

Absence Management

Component	Impact
Leave Types	For worker-based leave types, Workday evaluates the Country / Country Region criteria based on primary position.
Time Off Plans	For worker-based time off plans, Workday evaluates the Country / Country Region criteria based on primary position. To evaluate all positions, you can enable the Country / Country Region Enabled for All Positions check box.

Time Tracking

Component	Impact
Time Block Create Calculations	Always generate for the primary position, even if the time entry is for the additional position.
Time Entry	The primary position populates in the Position prompt when you enter time. All positions are available for selection.
Time Code Groups	Workday evaluates the Country / Country Region and Pay Rate Type criteria based on primary position only. To evaluate all positions, leave the Country / Country Region and Pay Rate Type fields blank, and build a time tracking eligibility rule using position-based business objects.

Staffing

Component	Impact
Notice Periods	Workday evaluates eligibility for notice periods based on the Country/ Country Region for the primary position. Unless you assign custom notice periods, they'll dynamically update when a primary position change results in an eligibility change.
Personal Information	The country for the primary position determines the: • Types of personal information that are available for the employee. • Values that you can select.

Component	Impact
	You can also add personal information by country based on a worker's additional positions.
Termination	Only security groups with permission to edit the primary position of the employee can initiate termination.

Talent

Component	Impact
Goals	You can only cascade private organization goals to the primary position.
Calibration	Workday includes employees included in calibration with their primary position.
Career Hub Talent Marketplace	Machine Learning only considers the primary position for: • Connections • Jobs • Mentors Machine Learning considers the skills of the worker for: • Flex Teams • Learning

Compensation

Component	Impact
Internal Compensation Benchmarking	The Internal Compensation Benchmark for Workers report returns only the primary position. Workday includes the employee in the report output if the criteria selected in the report prompts match with their primary position details. The compensation details displayed for the employee in the report are also only based on the primary position.

Benefits

Component	Impact
Insurance Rates Insurance Coverages Health Care Rates	Based on the primary position. Dynamically updates if you change the primary position.
Salary Source Based Benefit Credits	Enable the Combine All Jobs for Salary Source check box to base it on all positions. Or enable the Combine Benefit Jobs for Salary Source check box to base it on one or more benefit jobs.

Component	Impact
Non-Salary Source Based Benefit Credits	Always based on the primary position. Use benefit annual credits if you can't base the benefit credits on the primary position.
Benefit Jobs	Workday considers the primary position to be the benefit job. You can change the benefit job using the Change Benefit Jobs task.

Workday Payroll for the U.S.

Component	Impact
Pay On Demand	You can only request pay on demand for the primary position, unless this information is the same for both the primary and additional positions: • Company • Pay group

Workday Payroll for Canada

Component	Impact
Location Province of Employment Payroll Reference Number	Based on the processing position. For international assignments, this information is based on the company and work location of the position in Canada.

Reporting

Component	Impact
Trended Worker Reports	Trended worker reporting includes the primary position of the employee. Workday might not include the worker in the Trended Worker Reports at all if you enable the: • Exclude from Headcount check box for the primary position. • Remove Exclude From Headcount prompt on the Trended Worker Reports. You can treat the international assignment position as primary when you can't make the host position the primary position.
Worker-Based Reports	Standard and custom reports that use worker-based data sources return the position data of the primary position for the employee.

Various

Component	Impact
Eligibility Rules	Workday evaluates position-related report fields on the Worker business object based on the primary position. It varies per functional area whether report fields are available based on a Position business object. Assignment-related report fields are generally available. You can use calculated fields to evaluate eligibility based on the additional position.

International and Domestic Assignments

Setup Considerations: International and Domestic Assignments

You can use this topic to help make decisions when planning your configuration and use of international and domestic assignments. 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

International and domestic assignments in Workday enable you to create an assignment for employees who are working on a different team with responsibilities outside of their regular duties.

Business Benefits

With international and domestic assignments, you can:

- Place employees into another job or position or add an additional assignment.
- Flexibly manage employees during an assignment in their home or host position.
- Start assignments for internal candidates directly from a job application.

Use Cases

You can use international and domestic assignments to:

- Add assignments for employees and internal candidates.
- End assignments for employees.
- Change an employee's job to a domestic assignment.
- Track assignment types and the expected end date for the assignments.
- Report on assignment details to help assist with regulatory compliance.
- Exclude the host position from headcount when you initiate an assignment.

Questions to Consider

<table>
<tr><th>Questions</th><th>Considerations</th></tr>
<tr><td>What types of assignments do you manage?</td><td>You can configure different types of assignments for your organization and categorize them as domestic or international assignments.</td></tr>
<tr><td>How do you want to fill and manage international assignments?</td><td> You can fill international assignments with the Add Additional Job or Start International Assignment business process. Workday recommends that you use the Add Additional Job business process for improved functionality. If you already use the Start International Assignment business process, you can decide to either: Configure the Add Additional Job business process for new assignments and end existing international assignments with the End Additional Job business process.
Continue only using the Start International Assignment and End International Assignment business processes for international assignments. If you use the Add Additional Job business process and Workday Recruiting, you can add an assignment for internal candidates directly from a job application. You can manage employees in their host location by making the assignment a primary job. </td></tr>
<tr><td>How do you want to fill domestic assignments?</td><td> You can add a domestic assignment as an additional job with the Add Additional Job business process and make the assignment the primary job. You can manage employees in their host location by making the assignment a primary job. With the Change Job business process, you can also change an employee's job to a domestic assignment. If you use Workday Recruiting, you can add an assignment for internal candidates directly from a job application. </td></tr>
<tr><td>How do you want assignments to display on the worker profile?</td><td>You can configure labels for assignments that display in parentheses after an employee's title on their worker profile. You can also translate these labels. If you don't configure labels, Workday displays (IA) for an international assignment or (DA) for a domestic assignment after an employee's title.</td></tr>
</table>

Questions	Considerations
How do you want to track the home and host position details?	You can add assignments as additional jobs and track the home and host position details with the *Add Additional Job* business process. If you don't want to track the home position details, use the *Change Job* business process to change an employee's job to an assignment.

Recommendations

Workday recommends that you add international assignments with the *Add Additional Job* business process instead of the *Start International Assignments* business process for improved usability and flexibility.

To configure international assignments for Payroll accurately, make sure you set up:

- Assignment Type as *International* using the Add Job task.
- Non-international assignment and international assignment positions in different Workday pay group countries.

Requirements

To add assignments with the *Add Additional Job* business process, access the Configure Optional Fields task to enable assignment fields.

Limitations

- You can't currently select an assignment for the employee's primary job if the position has a Workday Payroll pay group assigned.
- Workday Payroll for Australia, Workday Payroll for France, and Workday Payroll for the UK don't currently support international assignments or multiple jobs. You can create a second work record or duplicate a worker ID to manage those workers.
- Workday Payroll supports only 1 active international assignment position at a time.

Tenant Setup

Access the Edit Tenant Setup - HCM task to enable multiple jobs.

Security

Domains	Considerations
Set Up: Position	Enables you to set up assignments.
Set Up: Staffing	Enables you to set up event categories and reasons for assignments.
Worker Data: Assignments and Global Mobility	Enables you to access assignment details for employees.
Worker Data: All Positions	Enables you to access all positions and assignment data for employees.

Business Processes

Business Processes	Considerations
Add Additional Job	Enables you to add additional jobs, international assignments, and domestic assignments for employees. If you use Workday Recruiting, you can start an assignment directly from a job application for an internal candidate. To streamline making an assignment the primary job, configure *Switch Primary Job* as a subprocess. You can also assign a collective agreement as a subprocess of the *Add Additional Job* business process.
Change Job	Enables you to add domestic assignments. If you use Workday Recruiting, you can start an assignment directly from a job application for an internal candidate. To streamline making an assignment the primary job, configure *Switch Primary Job* as a subprocess.
End Additional Job	Enables you to end additional jobs, international assignments, and domestic assignments. You can also use the *End Additional Job* business process to end international assignments added with the *Start International Assignment* business process.

If you decide not to use the business processes above for assignments, you can configure these business processes for international assignments:

Business Processes	Considerations
End International Assignment	Enables you to end international assignments that were added with the *Start International Assignment* business process.
Start International Assignment	Enables you to add international assignments for employees. You can configure role-based security groups for this business process but the Start International Assignment task isn't constrained to your configured security groups and gives users access to all workers in any organization. This enables users in host countries to start the international assignment for workers in other organization and locations.

Reporting

Reports	Considerations
Employees on International Assignment	View details for all employees on international assignments.
Employee with Compensation for Additional Jobs Audit	View details for all employees with compensation from additional jobs and assignments.

Reports	Considerations
View Assignment Type Label Override	View custom labels for assignment types.

Integrations

You can use these web services to manage assignments and switch primary jobs for employees in bulk:

- *Add Additional Job*
- *Change Job*
- *End Additional Job*
- *Switch Primary Job*

If you continue using the *Start International Assignment* and *End International Assignment* business processes, you can use these web services to manage international assignments in bulk:

- *End International Assignment*
- *Start International Assignment*

Connections and Touchpoints

International and domestic assignments interact with:

- Compensation.
- Payroll.
- Recruiting.

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: Workday Docs

Tasks

Create Custom Labels

Steps: Set Up Workday Docs

Reference

The Next Level: Understanding International and Domestic Assignments

The Next Level: International and Domestic Assignments Overview

Reference: Edit Tenant Setup - HCM

Steps: Set Up International and Domestic Assignments

Context

You can manage international and domestic assignments as additional jobs with these business processes:

- *Add Additional Job*
- *End Additional Job*

With the *Change Job* business process, you can change an employee's job to a domestic assignment.

You can also manage international assignments with these business processes:

- *Start International Assignment*
- *End International Assignment*

Using the *Add Additional Job* and *End Additional Job* business processes to manage international assignments provides you with improved usability and flexibility. Example: You can make an assignment a primary job as a subprocess of the *Add Additional Job* business process to manage employees in their host country.

Workday recommends that you don't end the assignment and terminate the employee on the same date. If you end the assignment and terminate the employee on the same date, the assignment continues to display as the default position on the worker profile. If you rehire the same employee, the position that you select when hiring becomes the employee's primary position.

Steps

1. Create Role-Based Security Groups.

   Configure role-based security for multiple jobs.

   Note: The Start International Assignment task isn't constrained to your configured security groups and gives users access to all workers in any organization. This enables users in host countries to start the international assignment for workers in other organizations and locations.
2. (Optional) Access the Edit Security Group task to grant managers access to the home and host job or position data for employee's on international assignments.

Option	Description
Role has access to the positions they support.	Gives the roles in the supervisory organization associated with the specified position access to the worker's person and job or position data.
Role for primary job has access to all positions.	Gives only those roles in the supervisory organization associated with the primary job or position access to the worker's person and job or position data.
Role has access to all positions.	Gives all roles in the supervisory organization associated with the primary and additional jobs or positions access to the worker's person and job or position data.

3. Create Custom Business Processes.
   - To manage international and domestic assignments, configure these business processes and security policies in the Staffing functional area:
     - *Add Additional Job*
     - *End Additional Job*

     To change employee's positions to domestic assignments, you can also configure the *Change Job* business process and security policies in the Staffing functional area.
   - To manage international assignments only, configure the *Start International Assignment* and *End International Assignment* business processes and security policies in the Staffing functional area.
4. Edit Domain Security Policies.

   Set up security policies for these domains in the Staffing functional area to set up and report on assignments:
   - *Set Up: Position*
   - *Set Up: Staffing*
   - *Worker Data: Assignments and Global Mobility*
5. Hide or Require Optional Fields.

   If you're using the *Add Additional Job* business process, enable assignment fields for the *Add Additional Job* business process with the Configure Optional Fields task.

   You can also hide assignment fields on the *Change Job* business process.

6. Access the Maintain Assignment Types task.

   Create assignment types.
7. (Optional) Access the Translate Business Object report.

   Translate custom assignment labels configured in the Maintain Assignment Types.
8. Access the Maintain Event Categories and Reasons task.

   Create categories and reasons for the *Add Additional Job* or *Start International Assignment* business process.
9. Access the Maintain End Additional Job Categories task.

   Create categories and reasons for the *End Additional Job*, *End International Assignment*, or *Change Job* business process.
10. If you use Workday Payroll to pay workers on international assignments, access the Edit Tenant Setup - HCM task.

    Select *Multiple Jobs* in the Position Setup Options to enable international assignment payments.
11. (Optional) Access the Maintain Custom Labels task.

    Create an alternative term for international assignments.
12. (Optional) Set up job overlap for vacating positions.

    Steps: Set Up Job Overlap on page 907.

Related Information

Reference

The Next Level: Understanding International and Domestic Assignments

The Next Level: International and Domestic Assignments Overview

Add International and Domestic Assignments

Prerequisites

- Set up assignments.
- Hire the employee into a primary job or position.

Context

You can send an employee on an international or domestic assignment by creating an additional position. These aspects of the assignment can differ from the primary job or position:

- Compensation rate.
- Job profile.
- Location.
- Pay rate.
- Scheduled hours.
- Supervisory organization. Examples; Company, Cost Center, Employee Belonging Council.

Steps

1. Access the Add Job task or the Start International Assignment task.

   Use the Add Job task if your organization uses the *Add Additional Job* business process for assignments.

   Use the Start International Assignment task if your organization uses the *Start International Assignment* business process for international assignments.

   Use the *Add Additional Job* business process if an employee has multiple positions and the assignment is domestic. You can also use *Change Job* for a domestic assignment if you don’t need to track the home position.

   For an international assignment, you can use either the *Add Additional Job* business process or the Start International Assignment task. Workday recommends that you use the *Add Additional Job* business process for improved functionality.
2. Select the Supervisory Organization for the assignment and the Employee.
3. Specify the Start Date and Reason.
   - If you use job requisitions, the Start Date must be on or after the Target Hire Date on the job requisition.
   - If you don't use job requisitions, the Start Date must be on or after the Hire Date on the position.
4. Complete the Assignment Details section.

   Workday populates many of these fields with values from the position or job requisition. If you use job requisitions, you can't change those values; update the job requisition itself.

Option	Description
Position	Doesn't display for organizations that use job management for the staffing model.
Job Requisition	Available for job management and position management organizations based on tenant settings. Job Management: Available if you select Enable Job Requisitions for Job Management. Position Management: • Required if you've selected Require Job Requisitions for All Position Management staffing events. • Available if you've selected Enable Job Requisitions for Position Management based on rules. Exit conditions defined on the *Hire* business process determine the requirement of a job requisition. Example: You can add an exit condition that requires job requisitions for all hiring in Canada, but not elsewhere.
Assignment Type	Select from the types defined in the Maintain Assignment Types task.
Employee Type	This value can be different from the employee type for the employee's primary job or position.

Option	Description
Job Profile	Select from the profiles you specified on the Create Position or Set Hiring Restrictions task, unless your tenant allows overrides.
Time Type	Select from the time types you specified on the Create Position or Set Hiring Restrictions task, unless your tenant allows overrides. Populates from the value defined on the job profile.
Location	Select from the locations you specified on the Create Position or Set Hiring Restrictions task, unless your tenant allows overrides. While the employee is on an assignment, Workday displays this location address as the work address of the host country on the employee's worker profile. When the employee has an alternate work location that's effective on or after the start date of this assignment, Workday also displays the alternate work location. If applicable, Workday also displays the address for this location in local script on the employee's profile.
Work Space	Select from the work spaces (such as building, floor, or cubicle) associated with the Location.
Pay Rate Type	Select from the pay rate types available for the country associated with the Location.
Expected Assignment End Date	Require this field for a fixed-term employee type. If you enable the Sync Employment/ Contract End Dates option in the Edit Tenant Setup - HCM task, this field syncs with the employment end date.

5. Complete the Working Time section.

   Workday initially populates many of these fields with values from the position or job requisition. As you complete the task, Workday updates the values.

Option	Description
Scheduled Weekly Hours	Populates from a rule when: • You've defined a working time rule. • The data populated on the task applies the rule. Populates from Default Weekly Hours when there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task.

Option	Description
	• There's no work hours profile or job requisition for the position.
Location Weekly Hours	Displays the standard weekly hours associated with the Location.
Default Weekly Hours	Populates from a rule when: • You've defined a working time rule. • The data populated on the task applies the rule. Populates from Location Weekly Hours when there's no working time rule. Populates based on the position restrictions when: • You select the Enable FTE for Position Restriction check box on the Edit Tenant Setup – HCM task. • There's no work hours profile or job requisition for the position.
FTE	Calculated by dividing the Scheduled Weekly Hours by the Default Weekly Hours. This value displays as a percentage.
Specify a Paid FTE	Select the check box to specify paid full-time equivalent for a worker. Available when you enable Paid FTE on the Maintain Localization Settings task.
Paid FTE %	You can enter a percentage that overrides the FTE field for use in your Workday Compensation and Workday Payroll calculations. Available when you enable Paid FTE on the Maintain Localization Settings task.
Specify a Working FTE	Select the check box to specify working full-time equivalent for a worker. Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Working FTE %	Enter a working full-time equivalent percentage. Used in custom reporting. Available when you enable Working FTE on the Maintain Localization Settings task. For use in custom reporting.
Work Shift	Available when you enable Work Shift on the Maintain Localization Settings task. Available when you select the Work Shift Required check box on the job profile.

Option	Description
	Define the work shifts for a location using the Maintain Work Shifts task.
Frequency	Select from the working time frequencies you specified on the Maintain Frequencies task. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Unit	Select from the preconfigured options of hours or days. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.
Value	Enter the duration of the working time in selected units. Automatically populates to zero. Available when you enable Working Time (Frequency, Time Unit, and Time Value) on the Maintain Localization Settings task.

6. As you complete the Additional Details section, consider:

Option	Description
Job Title	Populates from the Job Profile.
Business Title	Populates from the Job Profile. Secured to the *Worker Data: Business Title on Worker Profile* domain security policy in the Staffing functional area.
Job Category	Populates from the Job Profile.
Job Classifications	Populates from the Job Profile.
Additional Job Classifications	Select classifications as needed.
Company Insider Types	Select from the types associated with the Job Profile. Define company insider types on the Maintain Company Insider Types task; assign them to a job profile on the Edit Job Profile task.
First Day of Work	Populates from the Effective Date.

Result

When you search for the worker using global search, Workday always displays the manager of the primary job in the worker profile preview. The current manager displays on the Summary section of the worker profile.

The worker profile displays the assignment as the default position with the label (IA), (DA), or your configured label after the position name. To view the primary job, click Other Jobs.

Related Information

Concepts

Concept: Workday Docs

Tasks

Add Additional Jobs on page 879

Steps: Set Up Workday Docs

End International and Domestic Assignments

Context

When you end an employee's assignment, Workday removes the employee from the position and returns the employee to their primary position.

Workday recommends that you don't end the assignment and terminate the employee on the same date. If you end the assignment and terminate the employee on the same date, the assignment continues to display as the default position on the worker profile. If you rehire the same employee, the position that you select when hiring becomes the employee's primary position.

Steps

1. Access the End Job, End Jobs, or End International Assignment task.

   Use the End Job or End Jobs task if your organization uses the *End Additional Job* business process to end assignments.

   Use the End International Assignment task if your organization uses the *End International Assignment* business process.
2. Select the Employee and the job or position.
3. Complete the termination details:

Option	Description
Close Position	You can't close positions that have an open job requisition. Leave blank if you want to keep the position open for staffing. This field is only available for position management organizations; with job management, you can't open or close individual jobs.
Is this position available for overlap?	Specify whether another worker can fill the position before the incumbent departs. Available for position management organizations when job overlap is enabled in the Edit Tenant Setup - HCM task.
Last Day of Work	Populates to the Effective Date or End Date.
Pay Through Date	Populates to the Effective Date or End Date. Use this field in situations where severance pay continues past the employee's end date.
Notify By	Populates to the Effective Date or End Date.

Next Steps

If you use an alternate work location for the employee instead of the address for the assignment location, manually remove the alternate work location when it no longer applies. Otherwise, Workday will continue displaying the alternate work location as the employee's work address.

Related Information

Concepts

Concept: Workday Docs

Tasks

Terminate Employees on page 699

Ending Jobs on page 883

Steps: Set Up Workday Docs

Reference: International Assignments Comparison

Compare the functionality of the 2 business processes for adding international assignments.

	Add Additional Job	Start International Assignment
Set an assignment as the primary job as a subprocess?	Yes	No
Update collective agreements as a subprocess?	Yes	No
Set an assignment as a primary job if the position has a Workday payroll group assigned?	No	No
Set routing modifiers on the business process definition?	Yes	Yes
Start an assignment directly from a job application?	Yes	No
Exclude the position from headcount?	Yes	No
Track domestic assignments?	Yes	No

Compare the functionality of the 2 business processes for ending international assignments.

	End Additional Job	End International Assignment
End the primary job as a subprocess?	Yes	No
End assignments that were started with the *Start International Assignment* business process?	Yes	Yes

FAQ: International and Domestic Assignments

- Which business process should I use for an assignment? on page 906
- Can I start an international assignment from a job application? on page 906
- How is an employee on an international assignment paid? on page 906
- How to manage international assignments and time off plans? on page 906
- Is international assignment possible for contingent workers? on page 906
- How to extend an international assignment? on page 906
- Does an assignment end automatically on the expected assignment end date? on page 906
- Can an employee have 2 different international assignments with one home country position? on page 906

- How headcount reports work for an employee on an international assignment? on page 907
- Can I promote an employee who is on an international assignment? on page 907

Which business process should I use for an assignment?

If an employee is with multiple positions and the assignment is domestic, you should use *Add Additional Job*. You can also use *Change Job* for a domestic assignment if you don't need to track the home position.

For an international assignment, you can use either *Add Additional Job* or *Start International Assignment*. Workday recommends that you use the *Add Additional Job* business process for improved functionality.

Can I start an international assignment from a job application?

Yes, you can start an international assignment from a job application by using the *Add Additional Job* business process.

How is an employee on an international assignment paid?

The compensation will depend on the agreement you have made with the assignee. It's possible to configure Workday to pay an employee in their home country, host country, or both.

When an employee goes on an assignment, by default, the pay group will be tied to the home position. As part of the business process you use to start assignments, it's possible to assign a different pay group to the host position. Assigning a different pay group is necessary if the employee is paid through the host position, or for reporting purposes. Through the pay group assignments, you can send compensation data to your (third party) payroll for the home position, host position, or both.

How to manage international assignments and time off plans?

You can configure time off plans to be position-based or worker-based depending on your requirements.

You can evaluate time off plans based on:

- Primary position for worker-based plans.
- Both positions for position-based plans.

If your time off plans are worker-based, eligibility rules that reference the attributes of the position will be based on the home (primary) position of the worker. In this set up, a worker with an international assignment retains eligibility to the existing plans based on the home position.

For a worker on an international assignment to be eligible for time off plans based on the host position, the time off plans has to be position-based. In this case, the non-primary positions of the worker can be referenced for eligibility.

Is international assignment possible for contingent workers?

No.

How to extend an international assignment?

Use the Edit Position or Change Job task to change the expected assignment end date of a position with an international assignment.

Does an assignment end automatically on the expected assignment end date?

Assignments won't end automatically at an expected end date. You'll have to initiate the end of the assignment. Assignments can also end when you terminate an employee.

Can an employee have 2 different international assignments with one home country position?

Yes, an employee can have multiple assignments.

How headcount reports work for an employee on an international assignment?

When an employee is on an international assignment, the employee must have 2 positions: home and host position. Both positions are open and counted within headcount reports as 2. There's an option to exclude positions from headcount reports. Update a job profile and select the Exclude from Headcount check box to avoid displaying an employee twice in headcount reports.

Can I promote an employee who is on an international assignment?

Yes.

As the home and host positions are independent of each other, promoting one position will not impact the other. It's your decision to either promote an employee's home, host, or both positions.

Related Information
Reference
The Next Level: Understanding International and Domestic Assignments

Job Overlap

Steps: Set Up Job Overlap

Context

You can set up job overlap for 2 workers in 1 position on:

- Position restrictions when the principal worker has an unknown vacating date.
- Vacating business processes, such as *Change Job* and *Termination*, when the principal worker is transferring to another job or leaving the company.
- Positions when the principal worker goes on leave.

Steps

1. Access the Edit Tenant Setup - HCM task.

   Configure these job overlap options:

Option	Description
Enable Job Overlap for Vacating Positions	Enables you to select individual positions for overlap when they become vacant. Designate jobs for overlap in these business processes: • *Change Job* • *End Additional Job* • *End Contingent Worker Contract* • *End International Assignment* • *Termination* This selection displays the Is this position available for overlap? check box on the tasks for these business processes.
Automatically Select Is This Position Available for Overlap on Vacating Events	Automatically selects the Is this position available for overlap? check box on the tasks for these business processes: • *Change Job* • *End Additional Job*

Option	Description
	• *End Contingent Worker Contract* • *End International Assignment* • *Termination*
Enable Job Overlap on Position Restrictions	Enables you to select if a position is available for overlap on the position restriction. This selection enables you to backfill a position when the worker has an unknown vacating date. Example: You can backfill a position for a worker who is on an international assignment.
Enable Job Overlap Routing Exclusion Rules	Enables you to create and activate rules that will exclude specific Job Overlap positions from receiving notifications. This check box is only available if you've also selected either of these check boxes: • Enable Job Overlap for Vacating Positions • Enable Job Overlap on Position Restrictions
Allow Job Overlap for Leave	Automatically makes positions available for overlap when workers go on leave. Unlike the staffing option, this setting doesn't enable you to select individual positions for overlap. Any current or future-dated leave of absence at the worker level makes positions available for overlap.

When you enable both of these tenant settings, Workday recommends that you configure the *Remove Overlap Check Box on Position Restriction* event service on vacating staffing business processes:

- Enable Job Overlap for Vacating Positions
- Enable Job Overlap on Position Restrictions

When the worker is vacating the position, this configuration ensures that Workday automatically removes the Available for Overlap check box on the position restriction.

See Reference: Edit Tenant Setup - HCM.

2. (Optional) Configure the *Remove Overlap Check Box on Position Restrictions* event service step on vacating business process.

   If you enabled job overlap on vacating positions and position restrictions, configure the event service step on these business processes:

   - *Change Job*
   - *End Additional Job*
   - *End Contingent Worker Contract*
   - *End International Assignment*
   - *Termination*

   You can also configure a step delay for the event service.

3. (Optional) Configure rules to help reduce the number of notifications workers receive when they're inactive in a job overlap position.
    a) Select the Enable Job Overlap Routing Exclusion Rules check box on the Edit Tenant Setup - HCM task.
    b) Access the Create Job Overlap Routing Exclusion Rule task.

        Create rules specifying which positions that you want to exclude from receiving notifications.

        Security: *Set Up: Job Overlap Routing Exclusion Rules* domain in the Staffing functional area.
    c) Access the Maintain Job Overlap Routing Exclusion Rules task.

        Configure and maintain the rules you created on the Create Job Overlap Routing Exclusion Rule task.

    Workday excludes positions in job overlap from receiving routing based on the rules you configured. The rules only apply when:

    - There's 2 filled positions in job overlap capable of receiving routing.
    - The recipient is in a role-based security group.
    - You don't delegate or reassign the business process step.
    - The business process step isn't a Shared Participation Type.
4. (Optional) Hide or Require Optional Fields.

    Configure these fields:

    - *Job Holder for Position Overlap* on the *Job Details* report on the worker profile.
    - *Available for Overlap* on the Create Position and Edit Position Restrictions tasks.

Next Steps

- If you enabled job overlap on position restrictions, access the Edit Position Restrictions task. Select the Available for Overlap check box to make the position available for overlap another worker when the principal worker has an unknown vacating date.
- If you enabled job overlap on vacating positions, you can select the Available for Overlap check box on vacating business processes. This selection will make the position available for overlap another worker when the principal worker is leaving the position.
- If you enabled job overlap for leave, this setting automatically applies to any position filled by a worker who goes on leave.
- If you enabled job overlap routing exclusions, you can view positions that you excluded from receiving routing. Create a custom report using *Is Excluded from Routing* report field on the Position – Position Management business object (secured to the *Set Up: Job Overlap Routing Exclusion Rules* domain).

Related Information

Concepts

Setup Considerations: Leave of Absence on page 2554

Tasks

Maintain Step Delay

Reference

2021R2 What's New Post: Job Overlap for Positions

2023R1 What's New Post: Configurable Job Overlap Routing

Concept: Job Overlap

You can overlap workers in the same position to meet different staffing needs. Examples:

- Train a replacement before a worker transfers to another job or leaves the company.
- Backfill a position while a worker takes a leave of absence.
- Backfill a position while a worker is on an assignment.

Job overlap is only available for the position management staffing model. Workers can be in only 1 job overlap at a time.

The terms for job overlap include:

- *Principal worker* = original job holder.
- *Overlap worker* = secondary job holder.
- *Overlapped position* = original position.
- *Overlapping position* = secondary position.

Downstream Impacts

When a worker is in a job overlap, you may have downstream impacts to:

- The All Positions report. A single position in Job Overlap will be listed twice.
- Terminating a worker who's in a job overlap position.
- The *Move Worker (Supervisory)* business process. Workday suggests that you don't initiate the *Move Worker (Supervisory)* business process on a worker in a job overlap position. We suggest that you end the job overlap before moving the worker.
- Future-dated events. Workday suggests that you review any future-dated events for both workers before placing them in a job overlap. Such as any *Change Job*, *Move Worker (Supervisory)*, or *Termination* business process events.
- The *Change Job* business process. *Change Job* events for one worker might conflict with events you try to run for the other worker in the same position. Workday suggests not making any changes to a worker in a job overlap position when the other worker in the position has a *Change Job* event in progress.

Earliest Overlap Date

You can see the Earliest Overlap Date on the Position Overview tab in the View Position Restrictions report. This date is the later of:

- The day after the principal worker filled the position restriction.
- The day after the last overlap worker left the position restriction.
- The Target Hire Date on the job requisition.

The Earliest Overlap Date doesn't display if:

- The position restriction or supervisory organization is frozen.
- There's a pending staffing event that fills the position.
- The date when the principal worker left the position or returned from leave is earlier than the overlap date.

Fill Overlap Positions

You can fill a position with an overlap worker using the Add Job, Change Job, Contract Contingent Worker, Hire Employee, and Start International Assignment tasks. The Position prompt has a Filled Positions Available for Overlap selection list.

Only filled positions are available for overlap, and only 2 workers at a time can be in overlap for a position. You can overlap workers into positions that are in the past or hire a worker into a position that was available for overlap when the incumbent worker has already vacated.

You can hire a worker into a position that is available for overlap even if the incumbent worker doesn't have a future termination date.

If you require job requisitions, you must create a requisition before you can fill a position with an overlap worker. The target hire date on the requisition can be earlier than the position vacancy date.

If a position has a future-dated *Move Workers (By Organization)* or *Move Workers (Supervisory)* event, you can't fill it with an overlap worker until after the organization change takes effect.

Security Roles

Overlap workers share all security roles associated with the position with the principal worker during the overlap period. The workers share the manager roles as well, regardless of whether or not you enable supervisory organizations to have multiple managers.

Organization Assignments

Workday doesn't synchronize organization assignments between the overlapped position, the overlapping position, and the position restrictions. If you use these business processes, the changes only apply to the position or position restrictions that you act on:

- *Change Organization Assignments for Worker*
- *Change Organization Assignments for Workers by Organization*

Update the other position or position restrictions separately.

Manage Job Overlap

You can rescind or correct business processes that remove principal workers from their positions:

- When you rescind, the overlap worker remains in the position and keeps the security roles unless you take additional steps to reassign the worker.
- When you correct, you can only change the effective date and the overlap flag. If you've already assigned an overlap worker to the position, you can't change the overlap flag. You can't correct the effective date to be after the date that you hired the overlap worker into the position.

When you hire the overlap worker into a position on the same date that the principal worker leaves the position, the workers aren't in job overlap. The only exception is a termination, as the position doesn't become available until 1 day after the termination effective date. If you hire the overlap worker into the position on the termination date, the workers are in job overlap. If you hire 1 day later, they're not in job overlap.

You can move principal or overlap workers within nonsupervisory organizations with the *Move Workers (By Organization)* business process. You cant use the *Move Workers (Supervisory)* business process, which is only available for moving workers between supervisory organizations, to move workers who are in job overlap. You can't close positions that are in overlap.

Related Information
Reference
Reference: Edit Tenant Setup - HCM
2021R2 What's New Post: Job Overlap for Positions

Reference: Job Overlap Reporting

Workday provides several tools to help you report on job overlap.

Standard Reports	Two standard reports are available: Overlap Workers and Positions with Overlap.
Labels	Workday identifies overlap positions with these labels: • (Overlap) on the overlap worker's position and both workers' position restrictions.

	• (Position Vacate) or (On Leave) on the principal worker's position.
Workers	You see both the principal and overlap worker when you search by position ID, view organization members, and use these tasks and reports: • Directory by Organization • Headcount Report • Manage Position Freeze • Position Overview and Incumbent History on position restrictions • Position Restrictions as of Date The Job Holder for Position Overlap field also shows if a worker is the principal or overlap worker in the *Job Details* report on the worker profile. You can enable this field using the Configure Optional Fields task.
Position Count	The following reports count only 1 position when a job overlap exists: • FTE Report • Headcount & Open Position Analysis • Headcount Report • Open Position Summary

Related Information
Reference
2021R2 What's New Post: Job Overlap for Positions

Organization Assignments

Steps: Change Organization Assignments for Worker

Prerequisites

- Configure the *Change Organization Assignments for Worker* business process and security policy in the Organizations and Roles functional area. All roles that have initiate permission on the business process must also have edit permissions on the *Staffing Organizations: Header* domain. Access the Template-Driven Business Process Security report to confirm that you've aligned the business process and domain security permissions.
- When creating or editing supervisory organizations and location hierarchies, specify which organizations are available to assign by organization type.

Context

You can change the organization assignments for an individual worker or a position. These assignments can include a:

- Business unit
- Company
- Cost center
- Custom staffing organization

- Fund
- Gift
- Grant
- Program
- Region

Steps

1. Define the organization types that support staffing in the Maintain Organization Types report.

   Before you can assign workers to a costing or custom organization in a staffing transaction, you must select the Show in Change Organization Assignments and Job Requisition check box on the report. When you don't select this check box, some organization data won't be available, and the organization won't display on the worker position.
2. From the related actions menu of the worker, position, or position restrictions, select Organization > Change Organization Assignments.
3. In the Organizations section, view the default assignments and update them as needed.

   Workday displays only the organization types that you configured as Allowed Organizations when editing the:

   - Location Hierarchy.
   - Supervisory Organization.

   When you restrict the Allowed Organizations to Location Hierarchies and Supervisory Organization, Workday displays only organizations allowed in both.

   The location of a position might be in multiple location hierarchies. Workday displays only the organizations allowed across all location hierarchies as of the Effective Date.

   Workday also displays custom organizations in order of creation, and you can't change this order.

Next Steps

For the *Change Organization Assignments for Worker* business process, you can:

- Correct the latest event when it's a standalone event or a subprocess of another business process. The organizations must be active as of the new effective date.
- Set up out of order insertion and correction using the Maintain Functionality for Staffing Transactions task.

Related Information

Concepts

Concept: Moving Workers on page 922

Concept: Workday Docs

Tasks

Steps: Set Up Workday Docs

Reference

Reference: Default Organization Assignments on page 924

Reference: Edit Tenant Setup - HCM

2021R2 What's New Post: Correct and Insert Organization Assignments Out of Order

Mass Change Organization Assignments

Prerequisites

- Define the organization types that support staffing in the Maintain Organization Types report.

  Before you can assign workers to a costing or custom organization in a staffing transaction, you must select the Show in Change Organization Assignments and Job Requisition check box.
- Configure the *Change Organization Assignments for Worker* business process and security policy in the Organizations and Roles functional area. All roles that have initiate permission on the business process must also have edit permissions on the *Staffing Organizations: Header* domain.

Context

Make mass organization assignments or individual assignment changes for an individual worker or a position.

When you create or edit supervisory organizations and location hierarchies, you can specify which organizations are available to assign by organization type.

Steps

1. Access the Change Organization Assignments task.
2. Specify which workers to include in the change.
3. Select a new proposed organization for each existing current organization.

   - Make mass assignment changes that apply to all workers from the prompt in the Override Organization Assignments section at the top of the page. When you select an organization, it's displayed in the Proposed Organization field for all workers selected in the list.
   - Make individual assignment changes from the prompt in the Proposed Organization field for each worker.

   Available organizations are based on the allowed values that you specified on the supervisory organization intersected with the allowed values on the location hierarchy.

   Selection lists are based on the allowed values that you specified on the supervisory organization intersected with the allowed values on the location hierarchy.

   If you restricted the Allowed Organizations for supervisory organizations and location hierarchies, the selection lists contain the intersection of the allowed organizations for both. If the location of a position is in multiple location hierarchies, the selection list is limited to the intersection of allowed organizations across all location hierarchies as of the Effective Date.

   Note: If you leave the Proposed Organization blank, Workday deletes the existing Current Organization of that type.

Related Information

Tasks

Steps: Change Organization Assignments for Worker on page 912

Create Location Hierarchies

Maintain Organization Types

Steps: Set Up Mass Action Workbooks to Initiate Change Organization Assignments

Context

You can set up mass actions to initiate the *Change Organization Assignments for Worker* business process in bulk for up to 1000 workers.

Steps

1. Set up mass action workbooks.

   Steps: Set Up Mass Actions.
2. Edit Business Process Security Policies.

   Configure security permissions for the *Change Organization Assignments for Worker (Mass Action)* and *Change Organization Assignment (REST)* initiating actions on the *Change Organization Assignments for Worker* business process policy.
3. (Optional) Add additional facets to the delivered Launch Mass Change Organization Assignments for Worker report. To add additional facets, copy the delivered report to a custom report and add any additional filters to the report definition.
4. (Optional) Create Custom Reports.

   Create or edit a custom report that has a data source containing positions or position restrictions. You can use the report or report filter to populate up to 1000 workers in the workbook using the Launch Mass Action Event task.
5. (Optional) Create or edit a search report that has a data source containing positions or position restrictions. You can select workers in the search report to populate up to 1000 workers in the Launch Mass Action Event task.

   Ensure that you select *Launch Mass Action Event* from the Mass Action column on the Advanced tab of the search report.

   See Steps: Create Search Reports.

Next Steps

Access the Launch Mass Action Event task or a configured search report to initiate the *Change Organization Assignments for Worker* business process.

Related Information
Concepts
Setup Considerations: Org Studio and Mass Actions

Initiate Change Organization Assignments in Mass Action Workbooks

Prerequisites

- Configure the Change Organization Assignments for Worker business process and business process security policy.
- Set up mass action workbooks for changing organization assignments.

Context

You can initiate the *Change Organization Assignments for Worker* business process in bulk with a mass actions workbook.

You can add contingent workers and employees to the workbook by:

- Using the Launch Mass Change Organization Assignments for Worker or Launch Mass Change Job reports.
- Selecting a report in the Launch Mass Action Event task.
- Using a search report to access the Launch Mass Action Event task.
- Adding them manually in the workbook.

Steps

1. Access the Launch Mass Action Event task.

2. As you complete the task, consider:

Option	Description
Mass Action	Select *Change Organization Assignments for Worker*.
Report	To populate the workbook, select a standard or custom report that includes up to 1000 workers. The report must have a data source that contains positions or position restrictions. You can filter the population by report definition parameters, if you select a custom report with configured parameters.
Company Cost Center Region	Select a value for these fields to populate every row in the workbook. You can override these values in the workbook.

3. After the workbook generates, select Open Workbook.
4. Complete the details in the workbook using the prompts and validation messages.
5. Select Begin Error Validation.

   Resolve errors and submit the workbook.

   You can submit a workbook with errors. Any rows with errors remain in the workbook instead of initiating the *Change Organization Assignments for Worker* business process. You can access the workbook later to resolve and submit the remaining rows.

Result

The *Change Organization Assignments for Worker* business process initiates for the relevant workers in the workbook. Any other steps on the business process route for completion.

Related Information
Tasks

Steps: Set Up Mass Action Workbooks to Initiate Change Organization Assignments on page 914

Steps: Set Up Mass Actions

Set Up Out of Order Insertion and Correction for Organization Assignments

Prerequisites
Security: *Set Up: Staffing* domain in the Staffing functional area.

Context

Configure which security groups on the *Change Organization Assignments for Worker* business process policy can:

- Insert events out of order.
- Correct events out of order.

An out of order event is one you initiate with an effective date before a completed event.

If you had out of order events before 2022, you might see different current organization values returned for these business processes when comparing historical transactions:

- *Move Workers (By Organization)*

- *Change Organization Assignments for Worker*

You can use these web services to load and retrieve configurations on the Maintain Functionality for Staffing Transactions task in bulk:

- *Get Maintain Functionality for Staffing Transactions*
- *Put Maintain Functionality for Staffing Transactions*

Steps

1. Access the Maintain Functionality for Staffing Transactions task.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
2. Select *Change Organization Assignments for Worker* in the Business Process Type field.
3. As you complete the task, consider:

Option	Description
Functionality	Ensure that the functionality has the same security groups on the relevant actions on the business process policy: • The *Correct Out of Order Events* functionality corresponds to the *Correct* action. Example: You need to correct the region on an assign organization event for a worker who has subsequent assign organization events. • The *Insert Out of Order Events* functionality corresponds to the *Change Organization Assignments* initiating action and *Change Organization Assignments for Worker (Mass Action)* initiating action. Example: You need to initiate a change to the company for a worker. The effective date for the change is before an existing organization assignment event. • The *Insert Out of Order Events (Web Services)* functionality corresponds to the *Change Organization Assignments (Web Services)* initiating action. Example: You need to initiate a change to the company for workers, using the web service. The effective date for the change is before an existing organization assignment event.
Enabled for	The *All Security Groups* option enables access to every security group configured on the business process security policy, for the relevant action. The *Restricted Security Groups* option enables you to select any security group in the Security Groups column. However, Workday only grants access to the security groups that are on the

Option	Description
	corresponding action on the business process security policy.
Security Groups	The groups you select must also have access to the relevant actions on the business process security policy.

Result

- You can correct organization assignment events out of order for another business process when you configure *Change Organization Assignments for Worker* as a subprocess.
- When you insert or correct an organization assignment event out of order, Workday updates subsequent organization assignment events.
- You might have *Change Organization Assignments for Worker* business process definitions that use condition rules. You might need to update those condition rules to include the Impacted Future Events report field.

  Example: You have a condition rule that states that you can't associate Cost Center A with Region B. When you correct or insert a cost center for a worker out of order, Workday updates future events without considering the condition rule. You update the condition rule to include this information:

And/Or	Source External Field	Relational Operator
Or	*Impacted Future Events*	*is not empty*

  Now, Workday considers impacted future events when evaluating the condition rule.
- Any automatically updated future events will display a *Corrected* status on the Process History report. You can manually correct any individual events as required.

Example

Your cost centers for your organization are as follows:

	January 1	February 1	March 1	April 1
Cost Center	A	A	A	B

You insert Cost Center C for January 15th, replacing Cost Center A.

	January 1	January 15	February 1	March 1	April 1
Cost Center	A	C	A	A	B

Workday overrides Cost Center A to Cost Center C in all subsequent organization assignment events. Workday doesn't override Cost Center B because the cost center has a different value.

	January 1	January 15	February 1	March 1	April 1
Cost Center	A	C	C	C	B

Next Steps

To display any future events that Workday will update, click View Impacted Events on the *Change Organization Assignments for Worker* business process while you:

- Insert events out of order.
- Correct events out of order.

Related Information

Concepts

Concept: Out of Order Correction on page 944

Concept: Out of Order Insertion on page 945

Reference

2021R2 What's New Post: Correct and Insert Organization Assignments Out of Order

Move Workers in Supervisory Organizations

Prerequisites

Configure the *Move Workers (Supervisory)* business process and security policy in the Staffing functional area.

Context

You can move workers and positions from 1 supervisory organization to another. You can move all workers in the organization or individual workers. These restrictions apply:

- If you're moving workers from a job management organization to any other organization, you can move only filled positions. When moving workers from a position management organization to any other organization, you can move both filled and unfilled positions.
- You can't move workers who have a future-dated, completed staffing event that changes their supervisory organization.
- You can't move workers in organizations with more than 1500 jobs or positions, regardless of the number of workers you've selected. You can use the *Change Job* web service instead.
- You can't move workers who are in job overlap with the *Move Workers (Supervisory)* business process.
- If you move unfilled jobs or positions, you can't fill them until after the effective date of the *Move Workers (Supervisory)* event.
- You can rescind a hire or transfer for a worker who you've moved from 1 organization to another. You can:
    - Move the worker back to the hire organization before you rescind.
    - Move the worker back into the organization from which you transferred them before you rescind.

Steps

1. Access the Move Workers (Supervisory) task.
2. Identify workers to include in the move.
3. Identify the target organization for the selected workers.
    - You can move all workers to the same supervisory organization. Select the target organization in the Proposed Supervisory Organization field.
    - You can move workers to a mix of organizations. Select a target organization for each employee in the Proposed Supervisory Organization field in the table.

Next Steps

You can correct the effective date of an individual worker move that is part of a completed *Move Workers (Supervisory)* event. The new effective date automatically updates on the associated *Change Organization Assignments for Worker* event.

(Optional) To report on transfer activity from the *Move Workers (Supervisory)* business process, create a custom report using the *Trended Workers* data source.

Related Information

Concepts

Concept: Moving Workers on page 922

Concept: Workday Docs

Tasks

Mass Change Organization Assignments on page 914
Steps: Set Up Job Changes on page 844
Steps: Set Up Workday Docs

Move Workers to New Managers

Prerequisites

- Configure the *Move to New Manager* business process and security policy in the Staffing functional area.
- Create reasons for moving workers to new managers with the Maintain Event Categories and Reasons task.

Context

Create an organization for someone who isn't currently a manager and move a worker into the new organization. You can move workers to new managers when:

- The worker's position is in a job management or position management organization.
- The nonmanager's current organization uses the same staffing model as the worker's organization.
- The effective date of the move is after other staffing or organization changes that affect the worker's position.
- The worker's position has no in-progress events and isn't in a job overlap.

Steps

1. Access one of these tasks:

Option	Description
Change Job	Enables the current manager to search for and select a nonmanager in the Start section. Workday then displays an alert and automatically switches to the Move to New Manager task. This option provides a familiar starting point for managers, who must have permission on the initiating actions for both the *Change Job* and *Move to New Manager* business processes.
Move to New Manager	Enables the current manager to transfer a worker to a nonmanager who is currently in another organization.
Request Transfer to Me	Enables a nonmanager to request transfer of a worker from another organization. This task is: • Only accessible from the related actions menu of a worker. • Only available to workers who aren't managers.

2. Select the worker, date, reason, and new manager.
    - If you started from Change Job, you only need to select the reason.
    - If you started from Request Transfer to Me, you only need to select the date and reason.

Result

The new organization inherits its location, staffing model, roles, and organization assignments from the parent organization, and the manager's name becomes the default organization name.

If you include a Review Move to New Manager Action step in the *Move to New Manager* business process, an HR role can:

- Change the effective date and reason for the move.
- Update details about the new supervisory organization.

When the *Move to New Manager* business process completes, Workday:

- Creates a new supervisory organization as a subordinate to the new manager's current organization.
- Sets the availability date of the new organization to the effective date of the move.
- Assigns the new manager to the Manager role.
- Applies hiring restrictions from the parent organization (job management staffing model only).
- Moves the worker into the new organization.

Workday displays the transaction as a *Move Worker (Supervisory)* event in the worker's history.

Next Steps

If you rescind the *Move to New Manager* business process, Workday rescinds the worker's move but retains the new organization and manager role assignment.

Related Information

Concepts

Concept: Moving Workers on page 922

Concept: Workday Docs

Tasks

Transfer, Promote, or Change Job on page 821

Steps: Set Up Workday Docs

Assign Multiple Managers to Supervisory Organizations

Prerequisites

In the Maintain Assignable Roles task, ensure that the Restricted to Single Assignment check box isn't selected for the Manager role.

See ../../../manage-workday/organizations/dan1370797386252.dita.

Context

You can assign multiple managers to a supervisory organization, which is a common requirement in some industries where shift workers report to multiple managers. When an organization has multiple managers:

- More than 1 position can occupy the Manager role.
- 2 or more managers share equal responsibility for workers in an organization.
- All managers have the same abilities to initiate, view, and approve transactions on a group of workers.
- All managers display as equals on organization charts.

Steps

1. As a related action on the desired supervisory organization, select Roles > Assign Roles.
2. For the Manager role, verify that the Restricted to Single Assignment check box isn't selected.

   (This check box matches the setting of the Restricted to Single Assignment check box in the Maintain Assignable Roles task.)

3. In the Assigned To column, select 1 or more positions that you want to assign to the Manager role.
4. (Optional) In the Single Assignment column, select 1 of the positions assigned to the Manager role to use when a single assignment is required for integrations and reporting fields that require a single instance.

   This column displays for the Manager role only when the Restricted to Single Assignment check box for the Manager role isn't selected in the Maintain Assignable Roles task.

   Making a single assignment selection has no impact on business process routing or security. The Single Assignment column displays on the Roles tab of the associated supervisory organization only when you've explicitly selected a single assignment manager.

Result

After you assign multiple managers to a supervisory organization:

- Any associated organization charts display multiple managers by placing them adjacent to one another at the top of the organization.
- Business processes that are not configured to route to a single assignment manager route to all managers. Any of them can take action on the steps associated with the Manager role.
- Integrations that require a single assignment manager use either the designated manager (if one has been specified) or the manager whose last name comes first alphabetically.

Related Information

Concepts

Concept: Assign Roles

Concept: Moving Workers on page 922

Concept: Moving Workers

Moving Workers in Supervisory Organizations

For supervisory organizations, you move workers by configuring the *Move Workers (Supervisory)* business process.

Routing is based on the security of the outbound supervisory organization. Example: If you assign an approval step to the HR Partner, Workday routes it to the HR Partner in the outbound supervisory organization.

Approvals, reviews, and other workflow tasks apply to the move as a whole rather than to individual employees—separate reviews and approvals aren't required for each employee.

When you include the *Change Organization Assignments* subprocess:

- Routing is based on the security of the inbound supervisory organization.
- You can use the inbound supervisory organization defaults or keep the current organization assignments. To update the assignments for individual workers, use the Organization Assignments grid.
- Workday bypasses reviews, approvals, and other workflow tasks for individual employees and routes 1 workflow task for each inbound organization.

Moving Workers by Organization

For nonsupervisory organizations, you move workers by configuring the *Move Workers (By Organization)* business process. It is a stand-alone business process that starts the *Move Worker (By Organization)* subprocess for each worker who is moved.

Changing Organizational Assignments

You can change organization assignments for workers by configuring the *Change Organization Assignments for Worker* business process.

You can also make mass changes to organization assignments by configuring the *Change Organization Assignments for Workers by Organization* business process. This business process launches the *Change Organization Assignments for Worker* subprocess for each position in the organization. Add condition rules and workflow steps to the parent business process, since the subprocess automatically completes.

Alternative Ways to Move Workers

You can also move workers with these tasks:

- From the related actions menu of a supervisory organization, select Reorganization > Move Workers to move workers, jobs, or positions between 2 organizations that use the same staffing model. You can also use this action to move workers between other types of organizations.
- From the related actions menu of a worker or position, select Job Change > Transfer, Promote, or Change Job to move a single worker, position, or job at a time and enter detailed position or job data as part of the transfer. If you move a manager, you can also move the teams that report to that manager.
- Use the *Move to New Manager* business process to create an organization for someone who isn't currently a manager and move a worker into the new organization.
- Use the Enterprise Interface Builder (EIB) to move workers with the *Move Workers By Organization* web service operation.

Restricting Organization Selection Lists

If you want to restrict organization selection lists, specify which organizations are allowed by type from the related actions menu of supervisory organizations and location hierarchies.

Related Information
Concepts

Concept: Workday Docs

Concept: Moving Workers by Organization

Tasks

Steps: Change Organization Assignments for Worker on page 912

Mass Change Organization Assignments on page 914

Steps: Set Up Workday Docs

Concept: Organization Assignment Worktags

A worker's organization assignments become worktags that automatically populate on transactions involving the worker, such as:

- Expense reports.
- Financial transactions.
- One-time payments.
- Payroll costing allocations.
- Payroll input.
- Period activities pay for academic faculty.
- Spend authorization.
- Time entry.

Organization assignment worktags can also impact your planning, accounting, and reporting throughout Workday. Examples:

- Headcount plans.

- Organization operating expenses.
- Scorecards.
- Spend authorizations.

Worktags configured for organization types assigned to workers can impact accounting for transactions involving the workers. Example: A worker has an invalid combination of organization assignments based on the worktag configuration. The worker's organizations automatically populate as worktags on a transaction, but will cause an error when you try to save the transaction. The invalid combination can result in invalid accounting entries.

You can disable automatic population of worker organization assignments on specific transactions using the Maintain Worktag Type Precedences task.

To identify and fix any invalid organization assignments, access the Organization Assignment Exception Audit report. Fixing the invalid organizations can prevent incorrect worktag combinations. The report displays invalid organizations based on:

- The worker's supervisory organization.
- Any location hierarchies that include the location of the worker's position.
- The related worktag configuration for an organization assigned to the worker.
- The companies for the worker's cost center, from the Restricted to Companies field on the Create Cost Center and Edit Cost Center tasks.

Related Information

Concepts

Concept: Worktags

Concept: Moving Workers by Organization

Tasks

Configure Related Worktags

Configure Worktag Defaulting

Reference: Default Organization Assignments

Workday assigns default organizations to workers and positions based on:

- The availability of related worktags.
- The staffing event type.

Staffing Events

When *Change Organization Assignments for Worker* is a subprocess for these staffing events, it assigns default organizations as shown.

Parent Staffing Event	Organization Assignments
Create Position *Edit Position Restrictions* *Move Workers (Supervisory)*	Populates from the supervisory organization.
Add Additional Job *Contract Contingent Worker* *Hire* *Start International Assignment*	Depends on the staffing model in the proposed supervisory organization: • Job management: Populates from the job requisition if available, otherwise from the supervisory organization. • Position management: Populates from the job requisition if available; then from the

Parent Staffing Event	Organization Assignments
	hiring restrictions if available; otherwise from the supervisory organization. Note: If there are any organization assignments on the job requisition, all the organization data populates from there.

Note: If you don't change the default organization assignments in a staffing event, Workday automatically cancels the *Change Organization Assignments* subprocess.

Change Job

In *Change Job*, the *Change Organization Assignments for Worker* subprocess assigns default organizations differently for each staffing model according to this logic:

Staffing Model	Organization Assignments

Job Management	Filling a Job Requisition with Organization Assignments?
	• Yes: Organization assignments populate from the job requisition.
	• No: Are the current and proposed supervisory organizations job management?
	    • Yes: The Change Job Use Default Organizations for Job Management check box on the Edit Tenant Setup - HCM task determines whether organization assignments populate from the current job or from the proposed supervisory organization.
	    • No: Organization assignments populate from the proposed supervisory organization if available; otherwise from the current job.

Position Management	Filling a Job Requisition with Organization Assignments?
	• Yes: Organization assignments populate from the job requisition.
	• No: Are you creating a new position?
	    • Yes: Organization assignments populate from the proposed supervisory organization if available; otherwise from the current position.
	    • No: Organization assignments populate from the proposed position restriction. When there are no organizations on the proposed position restriction, organization assignments populate from the proposed supervisory organization.

Staffing Model	Organization Assignments
	Otherwise, organization assignments populate from the current position.

Related Worktags

When you add related worktags to cost centers, custom organizations, gifts, or grants, the *Change Organization Assignments*, *Job Requisition*, and *Job Requisition Change* business processes automatically populate organizations as shown.

Action	Organization Assignments
• Move a position that has organizations assigned. • Move a worker to a new position that has organizations assigned. • Move a worker and position together.	• Cost centers, custom organizations, gifts, and grants populate from related worktags. • Organizations that populate from related worktags supersede organizations defined on the position. • Default organizations must conform with the Allowed Organizations on the supervisory organization or location hierarchy.
Move a worker to a new position without organization assignments, but with default organizations assigned to the supervisory organization.	• Organizations populate from the supervisory organization. • Cost centers, custom organizations, gifts, and grants populate from related worktags when you change a worker's organization. • Organizations that populate from related worktags supersede organizations defined on the position. • Default organizations must conform with the Allowed Organizations on the supervisory organization or location hierarchy.
Move a worker to a new position without organization assignments.	• Cost centers, custom organizations, gifts, and grants populate from related worktags. • No other organizations automatically populate.
Create or edit a job requisition.	Workday automatically populates organizations on the Create Job Requisition and Edit Job Requisition tasks when you select an organization that has related worktags. Related worktags only populate for organizations you manually select. If an organization automatically populates as a related worktag, Workday doesn't populate the related worktags for that organization.

Related Information

Concepts

Concept: Moving Workers on page 922

Tasks

Steps: Change Organization Assignments for Worker on page 912

Reference

Reference: Default Job Requisition Data on page 620

Reference: Manager Change Event Lite

Workday creates an event lite and a corresponding transaction log lite for manager change when a worker has a new manager.

You can see audit entries for manager changes more accurately in the *Core Connector: Worker* integration output if a manager change event lite exists.

Background Job or Process	Description	Where to View
Manager change event lite	Depends on manager change background job. Runs periodically to update the audit trail of workers with new managers. Also runs when you use *Get Workers* web service.	Data audit files

Note: wd-environments will be the user making the change as wd-environments is the owner of the manager change background job.

Job and Business Titles

Concept: Changing Business Titles

You can specify a worker's business title in staffing tasks such as:

- Add Job
- Change Job
- Contract Contingent Worker
- Edit Position
- Hire Employee
- Start International Assignment

The business title automatically populates from the job title when you select a job profile.

- If the job profile has an empty Job Title Default field, then the job title automatically populates from the Job Profile Name field.
- If you override the default job title, the business title automatically changes to match the job title, but you can also override the business title.

Both titles are effective until the worker's job profile changes; then the job and business titles automatically populate from the new job profile.

There are 4 ways to change a business title in Workday. Only administrators can make future-dated changes to business titles.

- Administrators can:
    - Use the Change Business Title task.
    - Use the *Change Business Title* web service and EIB.
    - Change a worker's business title when correcting a staffing event.
- Workers can use the Change My Business Title self-service task to change their own business title.

You can change business titles out of order, without having to rescind later events in a worker's history, even if those events also change the business title.

Note: You must override the default job title and business title before you can translate business and position titles.

Related Information

Concepts

Concept: Out of Order Insertion on page 945

Concept: Enterprise Interface Builder

Tasks

Create Job Profiles on page 573

Reference: Job and Business Titles

Workers can have both a job title and a business title in Workday. The term *job title* applies to all staffing models and is equivalent to a position title in a position management organization.

A job title takes precedence over a business title.

Example: If you change a job title, which is populated from the job profile, from Consultant to Sales Solution Consultant, the business title will automatically change to Sales Solution Consultant.

Titles have these default values and characteristics.

	Job Title	Business Title
Automatically populates from the Job Title Default field (or if blank, from the Job Profile Name field) on the job profile.	X	
Automatically populates from the Job Title field in staffing tasks.		X
Editable in staffing tasks.	X	X
Effective dated.	X	X
Display name for a worker's job.	X	
Secured to the *Worker Data: Business Title on Worker Profile* domain for greater control over view permission.		X
Updates automatically if it defaults from the job profile and you change the Job Title Default or Job Profile Name field.	X	X
Can be updated through the *Title Change* business process, independent from other job data and optionally available for employee self-service.		X
Clears automatically if you override the default title and you change the worker's job profile.	X	X
Translatable if it defaults from the job profile, but not if you specify an override.	X	X

Related Information

Concepts

Concept: Changing Business Titles on page 927

Tasks

Create Job Profiles on page 573

Flexible Work Arrangements

Setup Considerations: Flexible Work Arrangements

You can use this topic to help make decisions when planning your configuration and use of flexible work arrangements. 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 enables you to track and report on the types of flexible work arrangements for your workers that are applicable to your organization.

Business Benefits

- Workers can request and view their flexible work arrangements in Workday.
- Enables managers and HR partners with tracking and reporting capabilities.
- Enables you to load data for flexible work arrangements in bulk.
- Reduces manual effort when ending jobs and terminating workers.
- Manage various work arrangements tied to workers.

Use Cases

- Workers can request or end their own flexible work arrangements.
- Users can add or end a flexible work arrangement for workers they support.
- Track and report on workers' current, future, and ended flexible work arrangements.
- Rescind upcoming or active flexible work arrangements.
- Users can correct termination dates for workers, which automatically updates their flexible work arrangement end date.

Questions to Consider

Questions	Considerations
What are the types of flexible work arrangements that you want to track for your organization?	Depending on the needs of your organization, you can configure types such as: • Compressed work schedule. • Fully remote. • Office/remote hybrid. • Work hours change.
Do flexible work arrangement types vary by country?	You can configure which countries you want to restrict the arrangement types and subtypes to. Example: Your company has locations in France, Germany, and the United States. When you configure subtype options for the *Fully Remote* flexible work arrangement type, you decide to

Questions	Considerations
	enable workers in the United States to have the option to work from home 100% of the time. However, you don't enable it for workers in France or Germany.
How can I test the condition rules that I've setup? How do condition rules impact future-dated positions and country restrictions?	You can access the Test Flexible Work Arrangement Subtype Eligibility Rule task to test the condition rule you've created. When you test condition rules for a future-dated position, Workday evaluates the rule at the moment the task runs, not as of the effective date of the position. This can result in the condition rule becoming ineligible at the time of testing. When you have both condition rules and country restrictions setup, Workday requires both to be true in order for the subtype to display when requesting or adding a flexible work arrangement.
Do you want managers or HR Partners to add Flexible Work Arrangements for workers directly?	You can set up Add Flexible Work Arrangement for Worker as an action step on the *Request Flexible Work Arrangements* business process. Ensure that you set the step preceding Request Flexible Work Arrangements as the completion step.

Recommendations

Configure a questionnaire on the *Request Flexible Work Arrangement* business process to collect address information and send a notification to Payroll if an employee is requesting to work from a location other than their home.

Configure flexible work arrangement types and subtypes that you can use in condition rules for business process routing.

Create a To Do step on the *Request Flexible Work Arrangement* business process if a worker requests a change in work hours. The To Do step reminds the user receiving the To Do to perform a job change.

When you enable users to add attachments, you can limit access to attachments by assigning them to categories that you secure to segment-based security groups.

Set up Embedded Analytics to enable managers to make business decisions based on insights gathered for their direct reports. You can gain visibility into this data when adding flexible work arrangements for workers.

You can configure this functionality using the Maintain Related Worklets related action on the *Request Flexible Work Arrangement* business process.

Requirements

No impact.

Limitations

- There are currently no connections to or from other Workday Solutions, such as Payroll or Recruiting.
- You can only add flexible work arrangements for a worker's current position, not previous positions.

Tenant Setup

No impact.

Security

Domains	Considerations
Self-Service: Flexible Work Arrangements	Provides a worker with self-service access to their flexible work arrangements.
Set Up: Flexible Work Arrangements	Secures set up tasks for flexible work arrangements.
Worker Data: Flexible Work Arrangements	Provides access to workers' flexible work arrangements.

Business Processes

Business Processes	Considerations
End Flexible Work Arrangement	Enables users to end a flexible work arrangement.
Request Flexible Work Arrangement	Enables users to request a flexible work arrangement. You can also set up the *Request Flexible Work Arrangement* business process as a sub process for these business processes: • Hire • Add Additional Job • Contract Contingent Worker • Start International Assignment

Reporting

Report / Report Data Source	Considerations
View Flexible Work Arrangement Types report	View the configured flexible work arrangement types and subtypes.
Workers with Flexible Work Arrangements report	View workers that have flexible work arrangements within the organizations and date ranges selected. You can also include workers with flexible work arrangements that have ended.
Flexible Work Arrangement for HCM Reporting report data source	Accesses Flexible Work Arrangement as its primary business object and returns 1 row per flexible work arrangement. Includes all flexible work arrangements.

Integrations

Web Services	Considerations
Add Flexible Work Arrangement	Adds a flexible work arrangement for a worker. Uses the Request Flexible Work Arrangement

Web Services	Considerations
	business process. When a worker has multiple jobs, you must specify 1 of the jobs for the worker.
End Flexible Work Arrangement	Ends a flexible work arrangement for a worker. Uses the Request Flexible Work Arrangement business process. When a worker has multiple jobs, you must specify 1 of the jobs for the worker.

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.

Related Information
Concepts
Concept: Workday Docs
Tasks
Steps: Set Up Workday Docs
Reference
2021R2 What's New Post: Flexible Work Arrangements
2022R2 What's New Post: Flexible Work Arrangements
2023R1 What's New Post: Flexible Work Arrangements as a Sub-Business Process of Staffing Events

Steps: Set Up Flexible Work Arrangements

Context

Workday enables you to track and report on the types of flexible work arrangements for your workers that are applicable to your organization.

Steps

1. Edit Domain Security Policies.

   Security: These domains in the Staffing functional area:

   - *Self-Service: Flexible Work Arrangements*
   - *Set Up: Flexible Work Arrangements*
   - *Worker Data: Flexible Work Arrangements*
2. Edit Business Process Security Policies.

   Configure these business process security policies in the Staffing functional area:

   - *End Flexible Work Arrangement*
   - *Request Flexible Work Arrangement*
3. Edit Business Processes.

   Configure these business processes in the Staffing functional area:

   - *End Flexible Work Arrangement*
   - *Request Flexible Work Arrangement*

4. Access the Maintain Flexible Work Arrangement Types task.

   Security: *Set Up: Flexible Work Arrangements* domain in the Staffing functional area.

   a. Configure flexible work arrangement types and subtypes offered to workers.
   b. (Optional) Access the Create Flexible Work Arrangement Subtype Rule task in the Condition Rule column to create condition rules for flexible work arrangements.

   To view all existing condition rules, you can use the Flexible Work Arrangement Subtype Rules prompt folder in the Condition Rule column.
5. (Optional) Access the Maintain Event Categories and Reasons task.

   Select these events and configure reason categories and subcategories for both:

   - *End Flexible Work Arrangement*
   - *Request Flexible Work Arrangement*
6. (Optional) Access the Configure Profile Group task.

   Select the *Job for Worker Profile* option in the Profile Group prompt.

   Add the Flexible Work Arrangements report.
7. (Optional) Create Custom Labels.

   Access the Staffing term context to override labels related to flexible work arrangements.
8. (Optional) Hide or Require Optional Fields.

   Hide or require fields for these business processes:

   - *End Flexible Work Arrangement*
   - *Request Flexible Work Arrangement*
9. (Optional) Define Document Categories.

   Add a document category for Flexible Work Arrangement business process attachments.
10. (Optional) Create Segment-Based Security Groups.

    Configure segmented security for access to Flexible Work Arrangement worker documents.

Next Steps

You can access the Workers with Flexible Work Arrangements report to view workers with flexible work arrangements within the organizations and date ranges selected.

You can set up Add Flexible Work Arrangement for Worker as an action step on the *Request Flexible Work Arrangements* business process. You can only add flexible work arrangements for a worker's current position, not previous positions.

Related Information
Concepts
Concept: Workday Docs
Tasks
Steps: Set Up Workday Docs
Reference
2021R2 What's New Post: Flexible Work Arrangements
2023R1 What's New Post: Configure Eligibility for Flexible Work Arrangements

Staffing History

Setup Considerations: Worker Start Date Corrections

You can use this topic to help make decisions when planning your configuration and use of the *Correct Worker Start Date* business process. 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 the *Correct Worker Start Date* business process to correct a worker's hire date while also addressing any blocking events.

Business Benefits

The *Correct Worker Start Date* business process enables you to reduce manual effort when addressing hire date corrections with blocking events.

Use Cases

Use for employees who need to move their hire date to another date and who have events blocking the new hire date.

Example: An employee has a hire date on August 1, as well as several other events later in August. You find out that they won't be able to start until September 1. You use the *Correct Worker Start Date* business process to correct the hire date and correct, rescind, or cancel the blocking worker events.

Questions to Consider

Questions	Considerations
What do hire date corrections look like for your organization?	Consider what events typically affect hire date corrections, as well as what status they tend to be in. These events can affect how you configure your security and defaulting rules. Example: Your new hires generally have a completed *Move Worker* event that prevents you from correcting their hire date. You set up your defaulting rules so that Workday attempts to automatically rescind this event during a hire date correction.
Who should be able to perform worker start date corrections?	The *Correct Worker Start Date* action step is best suited to administrator-level users who have permission to view all in progress and completed events for a worker.
Who do you want to notify?	When a worker event requires a user to take action, Workday sends a task to My Tasks of the selected Notify groups in the Correct Worker Start Date task grid. Ensure that notified groups know how to address the relevant events.
What kinds of events do you want to address?	Workday requires you to address all blocking events.

Questions	Considerations
	The Correct Worker Start Date task grid displays all actionable events that occur on or after the original hire date, including events that: • Are in progress. • Don't block the hire date.

Recommendations

Workday recommends that you provide thorough training for the groups who will receive tasks in My Tasks for manual action.

Requirements

This business process uses tasks in My Tasks to notify user groups of events that need manual action. Ensure that you set up the *Notify Worker Start Date Correction Event* business process to enable these tasks in My Tasks.

Limitations

You can only use the *Correct Worker Start Date* business process to:

- Address blocking events that support correct, rescind, or cancel.
- Address the worker's latest hire date.

When the current hire date is:

- In the past, you can't move the hire date back further.
- In the future, you can move the hire date to the current date or later. Ensure that the new hire date isn't already in the past for the worker's local time zone.

The *Correct Worker Start Date* business process can correct the start date for employees only.

A worker can have only 1 start date correction in progress at a time.

You can't rescind or send back the *Correct Worker Start Date* business process.

This feature doesn't apply to contingent workers.

Tenant Setup

No impact.

Security

Domains	Considerations
Business Process Administration in the System functional area.	Can create business process definitions.
Set Up: Maintain Defaulting Rules for Worker Start Date Correction in the Staffing functional area.	Can access the Maintain Defaulting Rules for Worker Start Date Correction task.
Staffing Actions: View Worker Start Date Correction in the Staffing functional area.	Can access the View Worker Start Date Correction report.
Staffing Actions: View Worker Start Date Job in the Staffing functional area.	Can access the Correct Worker Start Date job processing.

To access and submit a *Correct Worker Start Date* event, users must:

- Have access to the Correct Worker Start Date action step on the *Correct Worker Start Date* business process.
- Have permission to correct the *Hire* business process.

Business Processes

To use this feature, you must set up these business processes:

- *Correct Worker Start Date*
- *Notify Worker Start Date Correction Event*

The *Notify Worker Start Date Correction Event* business process enables Workday to send tasks in My Tasks to users who must take action on blocking events.

You can correct *Assign Pay Group* events as part of the *Correct Worker Start Date* business process.

Reporting

You can use the View Worker Start Date Correction report to view the business process status.

Integrations

No impact.

Connections and Touchpoints

Because the *Correct Worker Start Date* business process affects worker events, it can interact with multiple areas of Workday, including:

- Absence Management.
- Benefits.
- Compensation.
- Onboarding.
- Payroll.
- Time Tracking.

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: Worker Start Date Corrections on page 943

Tasks

Hire Employees on page 690

Reference

2020R1 What's New Post: Worker Start Date Corrections

Steps: Set Up Worker Start Date Corrections

Prerequisites

Review Setup Considerations: Worker Start Date Corrections on page 933.

Context

The *Correct Worker Start Date* business process enables you to:

- Move a worker's hire date.
- Manage blocking events for the new hire date.

This feature doesn't apply to contingent workers.

Steps

1. Access the Create Business Process Definition (Default Definition) task.

   Create these business process definitions:

   - *Correct Worker Start Date*
   - *Notify Worker Start Date Correction Event*

   Security: *Business Process Administration* domain in the System functional area.
2. Edit Business Process Security Policies.

   Configure the *Correct Worker Start Date* business process security policy in the Staffing functional area.

   Ensure that groups with access to the *Correct Worker Start Date* action step also have permission to correct hire events.

   Configure the *Notify Worker Start Date Correction Event* business process security policy in the Staffing functional area.

   Assign the Worker Start Date Correction Assignee security group to the *Blocking Action for Worker Start Date Correction* action step. Make no other changes to the security policy.
3. Configure a business process definition for these business processes:

   - *Correct Worker Start Date*
   - *Notify Worker Start Date Correction Event*

   See: Steps: Configure Business Process Definitions.

   For the *Correct Worker Start Date* business process, include only:

   a. An *Initiation* step.
   b. The *Correct Worker Start Date* action step.
   c. (Optional) A *Review Documents* type step. Ensure that this step is after the *Correct Worker Start Date* action step.
   d. (Optional) An approval step. Ensure that this step is after the *Correct Worker Start Date* action step and is the completion step.

   For the *Notify Worker Start Date Correction Event* business process, include only:

   a. An *Initiation* step.
   b. The *Worker Start Date Correction Assignee* security group on the *Blocking Action for Worker Start Date Correction* action step.
4. Edit Domain Security Policies.

   Configure the security policies for these domains in the Staffing functional area:

   - *Set Up: Maintain Defaulting Rules for Worker Start Date Correction*
   - *Staffing Actions: View Worker Start Date Correction*
   - *Staffing Actions: View Worker Start Date Job*
5. (Optional) Access the Maintain Defaulting Rules for Worker Start Date Correction task.

   Set up defaulting rules for some events in the *Correct Worker Start Date* business process. During the *Correct Worker Start Date* business process, users can edit these defaults before submitting the event grid. As you complete the task, consider:

Option	Description
Event	Includes all worker events that support cancel, correct, or rescind. When an event isn't

Option	Description
	blocking the hire date and doesn't support those actions, it doesn't display in the grid. You can create only 1 defaulting rule for each event type.
Proposed Action	Workday only enables you to select proposed actions that are possible for each event. When you select these actions, Workday only routes a task to My Tasks of the Notify groups when an error occurs: • *Automatically Correct* • *Automatically Rescind/Cancel* When you select *Manually Correct*, Workday routes a task to My Tasks of the Notify groups.
Proposed Effective Date	When you select the *Same as Proposed Hire Date* option, the proposed effective date for the event will default to the proposed hire date. When you select the *Same Interval Between Dates* option, Workday uses the interval of time between the current hire date and the current event effective date. Example: The current one-time payment date is 1 week after the current hire date. The proposed effective date for the one-time payment will also default to 1 week after the proposed hire date.
Notify	Only displays the groups that have permission on the associated business process security policy, to correct, rescind, or cancel the event. Workday sends a task to My Tasks of these groups when: • You select a manual proposed action. • Workday encounters an error while attempting to automatically correct, rescind, or cancel an event.
Include	Clear this check box to exclude events from the start date correction for the worker. You can only clear events that don't block the new hire date.

Next Steps

Use the Request Worker Start Date Correction task to initiate a start date correction for a worker.

View the status of the start date correction with the View Worker Start Date Correction report.

To edit documents that you attached to the business process for the worker, access the View Worker Start Date Correction report. From the related actions menu of the Business Process, select Business Process > Manage Attachments.

Related Information

Concepts

Concept: Worker Start Date Corrections on page 943

Tasks

Hire Employees on page 690

Reference

2020R1 What's New Post: Worker Start Date Corrections

Correct Staffing Events

Prerequisites

The original event must have a status of *In Progress* or *Successfully Completed* before you can enter corrections. For academic appointments, the event status must be *Successfully Completed*.

Context

You can correct the details of a staffing event to fix data entry errors or react to changes as many times as needed. In many cases, you can correct a staffing event out of order, without rescinding subsequent events, as long as the sequence of events is in the same order. You must have access on the *Correct* action on the business process security policy in order to correct a staffing event.

Note: Only administrators should have security permission to correct staffing events. Corrections don’t trigger notifications and Workday saves corrections without requiring review or approval of the main process or any subprocess steps.

Correctable staffing events include:

Category	Business Process
Hire	• *Add Additional Job* • *Assign Employee Collective Agreement* • *Contract Contingent Worker* • *Edit Notice Periods* • *Hire* • *Employee Contract* • *Manage Probation Period* • *Start International Assignment*
Job Change	• *Assign Employee Collective Agreement* • *Change Job* • *Edit Notice Periods* • *Employee Contract* • *Manage Probation Period*
Work Space Change	• *Change Work Space*
Organization Assignments	• *Change Organization Assignments for Worker*
Termination	• *End Additional Job* • *End Contingent Worker Contract* • *End International Assignment* • *Termination*
Retirement	• *Add Retiree Status* • *Remove Retiree Status*
Academic Faculty	• *Add Academic Appointment*

Category	Business Process
	• *End Academic Appointment* • *Update Academic Appointment*

Steps

1. Select Worker History > View Worker History from the related actions menu of the employee whose event that you want to correct.

   Find the event that you want to correct.

   a) Select Business Process > View Hire or Contract Start Date Correction Conflicts from the related actions menu of the *Hire* or *Contract* event.
   b) Correct or rescind any business process events that would block the correction of the hire or contract start date.
2. From the related actions menu of the staffing event you want to correct, select Business Process > Correct.
3. If the employee has later events, expand the Subsequent Processes section to view possible impacts of your changes to existing job information.

   The Subsequent Processes section displays all staffing events, worker moves, and reorganizations that occurred later than the effective date of the event you want to correct.

   Note: You might see *Workday System Generated Events* in the process history. These events reflect changes that occurred when Workday converted and automatically populated data during a previous update. You can drill into these events for more information and you can rescind the events if necessary.
4. Correct the event details as needed.

Result

After you complete a correction to a business process that includes the *Change Benefit Elections* step, Workday checks for changes to the employee's benefit eligibility.

Note: Workday doesn't check for eligibility changes if the business process initially skipped the Change Benefits step, based on your business process configuration. You can manually initiate a benefit event with the Change Benefits task.

Related Information

Concepts

Concept: Out of Order Correction on page 944
Concept: Corrections to Staffing History on page 942
Concept: Coordination of Benefits Enrollment Events on page 1363
Concept: Worker Start Date Corrections on page 943

Correct Hire Date and Reason for Multiple Employees

Prerequisites

- Configure the *Mass Correct of Hire* business process in the Staffing functional area.
- Security: *Staffing Actions: Mass Correct* domain in the Staffing functional area.

Context

You can change the Hire Date and Hire Reason for multiple employees. Example: Your company and another company have merged and you want all employees from the other company to have the same Hire Date and Hire Reason.

Steps

1. Access the Mass Correct of Hire report.
2. Select a Start Date and an End Date for the hire dates or reasons to correct.
3. (Optional) Select faceted search check boxes to restrict the result set of hires that meet your start and end dates.
4. Select 1 or more individual hires or Select All.
5. Select Correct Hire.
6. Select the correct Hire Date or Hire Reason to replace the current values.

Related Information
Tasks

Hire Employees on page 690

Correct Staffing Events on page 939

Concept: Job History

Use the Job History report to see how a job or position has changed over time. This report is available for all staffing models and displays:

- Which staffing events affected a job.
- Who initiated those events.
- When the events occurred.

You can view Job History in several ways:

For a Worker	Select Job History on the worker profile. You can see the worker's entire job history as long as you have access to the worker's current job. If the worker has additional jobs, select Other Jobs in the header to switch from the primary job to another job. Your security access to multiple job workers determines whether you can view history for all jobs or only the jobs you support. Note: To add the Job History report (secured to the *Worker Data: Historical Staffing Information* domain) to worker profiles, use the Configure Profile Group task. To view past, present, and future jobs for a worker, access the View All Jobs report (secured to the *Worker Data: Staffing Information* domain).
For a Specific Job or Position	Select Position > View Job History from the related actions menu. Workday also displays a History section when you view or edit a job or position.
For All Workers That You Have Permission to Access	Access the Job History standard report. You can export the report to Microsoft Excel for further analysis.

You can customize the Job History report to meet your needs with the Copy Standard Report to Custom Report task. Workday also provides several job history report fields.

Related Information
Concepts

Concept: Landing Pages

Tasks

Steps: Set Up Profiles and Profile Groups

Concept: Corrections to Staffing History

You can correct a hire, termination, or job change based on these guidelines and restrictions.

Workday recommends reviewing both the Job History report and the event details you're correcting in the Worker History report. This ensures that you're correcting the latest and most accurate details.

Hire

- You can correct information only in the initial *Hire* step, not other steps, or substeps (such as compensation elements).
- You can correct the pre-hire record, job, or position only by rescinding the original hire action and restarting the process.
- If you configure the Add Probation Period step on the *Hire* business process and you correct the Hire Date of the *Hire* event, Workday:
    - Recalculates the dates of the associated *Manage Probation Period* event.
    - Doesn't recalculate the dates of the associated *Manage Probation Period* event with extended end dates or if recalculating the dates causes overlap with another *Manage Probation Period* event.
- You can correct the Hire Date and Reason for multiple employees using the Mass Correct of Hire task.
- You can correct the supervisory organization on a completed hire, as long as the new supervisory organization uses the same staffing model. Use the Change Organization Assignments task to change organization assignments manually when assignments on the position don't align with the allowed organizations on the new supervisory organization.
- You can't override hiring restrictions established at the position, or organization level, including restrictions on the:
    - Job profile
    - Employee type
    - Time type
    - Location

  Use the Edit Position Restrictions and Edit Hiring Restrictions tasks instead.

Termination

- You can correct an employee's termination details, but to reverse a termination you must rescind the event.
- You can only correct information in the initial *Termination* step, not other steps, or substeps (such as COBRA eligibility).
- You can't correct the Close Position check box, regardless of the termination status.

Change Job

- The *Change Job* business process includes outbound and inbound steps in the same workflow. During correction, you only see the proposed (changed) job information. You don't see a worker's current and proposed values in side-by-side columns as you do in the initial task.

- If you configure the Add Probation Period step on the *Change Job* business process and you correct the Effective Date of the *Change Job* event, Workday:
    - Recalculates the dates of the associated *Manage Probation Period* event.
    - Doesn't recalculate the dates of the associated *Manage Probation Period* event with extended end dates or if recalculating the dates causes overlap with another *Manage Probation Period* event.
- You can correct job-related information but, regardless of the process status, you can't correct the:
    - Supervisory organization.
    - Job or position.
    - Headcount options.
    - Option to create a position.
- You can’t correct organization changes for a staffing event if:
    - It's a duplicate event created to keep position and position restriction in sync.
    - It isn't at the top of the list when there are multiple assign organization events for the same day.
    - It has a compensation review in-progress.

Related Information

Tasks

Correct Staffing Events on page 939

Correct Hire Date and Reason for Multiple Employees on page 940

Reference

2021R1 What's New Post: Correct Supervisory Organization on Hire

Concept: Worker Start Date Corrections

You can use the *Correct Worker Start Date* business process to correct the hire date for a worker and take action on any associated worker events.

Requesting a Worker Start Date Correction

You can only initiate the *Correct Worker Start Date* business process using the Request Worker Start Date Correction task.

Once submitted, Workday generates a task in My Tasks for the groups specified in the Correct Worker Start Date action step of the *Correct Worker Start Date* business process.

Before you submit the *Correct Worker Start Date* business process task in My Tasks, you can still cancel the business process in these ways:

- The user who submits the Request Worker Start Date Correction task can access the Business Process > Cancel related action from the archived task in My Tasks.
- The user who receives the *Correct Worker Start Date* task in My Tasks can select Task Action > Cancel.

Once you submit the *Correct Worker Start Date* business process, you can't rescind it or send it back.

Processing Events

For every event included in the business process, Workday either:

- Completes the proposed automatic action.
- Sends a task in My Tasks to a user instructing them to take manual action. Workday doesn't send a manual correction if an event is a subprocess of the *Hire* business process.

When moving the hire date to a later date, Workday processes the events in reverse chronological order based on current effective dates, starting with the latest event. When moving the hire date to an earlier date, Workday processes the events in chronological order.

For all manual actions, Workday sends a task in My Tasks to the group proposed in the Notify column of the Correct Worker Start Date grid. Workday also sends tasks in My Tasks to users informing them to take manual action when an error prevents an automatic action.

Once Workday sends a task in My Tasks, a user must take action before the worker start date correction can continue. They don't have to take the action proposed in My Tasks. They can take any appropriate action, including actions on multiple events.

Once someone reviews and takes action on an event, Workday continues the correction process automatically.

View Worker Start Date Correction

Use the View Worker Start Date Correction task to track the worker start date correction process. The task grid displays both the proposed action and the status for each event. When an event is In Review, the process won't continue until the notified user takes action on that event.

When an event automatically corrects, rescinds, or cancels, Workday adds a system-generated comment to the event process history.

Note: You can cancel a worker start date correction process from the View Worker Start Date Correction task. However, when you cancel the process at this point, Workday won't cancel or rescind any events that are already automatically or manually addressed.

Related Information
Concepts
Setup Considerations: Worker Start Date Corrections on page 933
Tasks
Steps: Set Up Worker Start Date Corrections on page 936
Reference
2020R1 What's New Post: Worker Start Date Corrections

Concept: Out of Order Correction

You can correct a staffing event without rescinding later events in a worker's history, as long as the correction doesn't change the worker's position. For academic workers, you can't correct the track type or employment position. Workday enables you to make out of order corrections to most staffing events that are available for correction, including:

Category	Business Process
Hiring	• *Add Additional Job* • *Contract Contingent Worker* • *Hire* • *Start International Assignment*
Job Change	• *Change Job*
Work Space Change	• *Change Work Space*
Termination	• *End Additional Job* • *End Contingent Worker Contract* • *End International Assignment* • *Termination*
Academic Faculty	• *Add Academic Appointment*

Category	Business Process
	• *End Academic Appointment* • *Update Academic Appointment*

To help you determine the impact of a correction, Workday displays any subsequent processes that a change could affect, including staffing events, moves, and reorganizations. Whenever a worker's history has later events than the effective date of the event you're correcting, the Correct Business Process page includes the Subsequent Processes section.

The key things to remember about out of order corrections:

- You can't change the sequence of events in a worker's history. If you correct the date of a staffing event, the new effective date must be:
  - *On or after* the date of the previous event in the staffing history.
  - *On or before* the date of the next event in the staffing history.
- Workday doesn't apply corrections to later events in a worker's history.

  Note: There's an exception for the *Change Organization Assignments for Worker* business process. When you correct an organization assignment event out of order, Workday automatically updates future events. Organization assignment events in the future with the same value will update to the corrected value. Workday updates future events until there's an event with a different value for the organization type.
- If you correct a completed staffing event, Workday doesn't validate the correction against the hiring restrictions that you defined for the worker's job or position.
- Workday doesn't provide additional security for out of order correction. Anyone who has permission to initiate one of these staffing events can correct it out of order. Workday recommends that you restrict the correct action to administrators.

  Note: There's an exception for the *Change Organization Assignments for Worker* business process. Workday provides additional security for correcting organization assignment events out of order through the Maintain Functionality for Staffing Transactions task.

Related Information

Concepts

Setup Considerations: Worker Start Date Corrections on page 933

Tasks

Correct Staffing Events on page 939

Reference

2021R2 What's New Post: Correct and Insert Organization Assignments Out of Order

Concept: Out of Order Insertion

You can insert a staffing event without rescinding later events in a worker's history.

When the new event doesn't change the worker's position, you can insert out of order changes for these business processes:

- *Assign Matrix Organization*
- *Assign Pay Group*
- *Change Job*
- *Change Organization Assignments for Worker*
- *Change Work Space*
- *Edit Position*
- *Edit Position Restrictions*
- *Employee Contract*
- *Freeze Position*

- *Remove from Matrix Organization*
- *Request Compensation Change* (unless there's a pending merit event with a promotion)
- *Service Dates Change*
- *Title Change*
- *Update Academic Appointment*

You can configure the *Change Job* business process so that you can insert position and job change events before other completed staffing and end-employment events and their respective subprocesses. You can insert vacating and non-vacating job, position, and supervisory organization changes. See: Concept: Out of Order Insertions for Job Changes.

If an out of order insertion could affect later staffing events, Workday displays those events in an exception. You're responsible for determining the impact of your change and updating the later events as needed. Optionally, you can add a *Review* step to your business process definitions that identifies an out of order event. The step then routes the change to an HR Administrator for review. Workday provides an *Out of Order Business Process* boolean report field for this purpose.

Note: The default definitions of the *Assign Pay Group*, *Edit Position*, and *Title Change* business processes include this *Review* step for new implementations. Instructions for configuring this step in existing business process definitions are available in the Workday Community.

The key things to remember about out of order insertions:

- When you insert an event out of order, your change is effective only until a later event changes it.
- Workday doesn't apply details from an out of order event to later events in a worker's history.

  Note: There's an exception for the *Change Organization Assignments for Worker* business process. When you insert an organization assignment event out of order, Workday automatically updates future events. Organization assignment events in the future will have the same value until there's an event with a different value for the organization type.
- Workday doesn't provide additional security for out of order insertion. Anyone who has permission to initiate one of these staffing events can insert it out of order.

  Note: There are exceptions for the *Change Organization Assignments for Worker* and*Change Job* business process. Workday provides additional security for inserting events out of order through the Maintain Functionality for Staffing Transactions task.

Related Information
Reference
2021R2 What's New Post: Correct and Insert Organization Assignments Out of Order

Concept: Out of Order Insertions for Job Changes

Note: This topic is relevant to the enhanced change job experience. The new change job experience is available to all customers at this time.

Workday enables you to configure the *Change Job* business process so that you can insert position and job change events before other completed staffing and end-employment events and their respective subprocesses. You can insert these events out of order:

- *Change Job*
- *Change Organization Assignment*
- *End Additional Job*
- *End International Assignment*
- *End Contract for Contingent Workers*
- *Edit Position*
- *Move Worker by Supervisory Organization*
- *Move Worker by Organization*
- *Termination*

You can only insert out of order changes when you are moving a worker into a vacant job or position. To rescind out of order insertions, you must start with the latest effective date and move through backward, rescinding sequentially.

Downstream Impacts

For changes that do not vacate a job, position, or supervisory organization, Workday only applies the data from the inserted event until the subsequent event in the worker's history. Workday doesn’t automatically roll out of order event data forward to all subsequent events.

When you insert a change that vacates a job, position, or supervisory organization, Workday updates subsequent events with the new position, job, or supervisory organization data.

Workday recommends accessing the Out of Order Job Changes report (secured to the *Worker Data: Historical Staffing Information* domain) to audit any out of order changes and their downstream impacts. You may need to manually correct job-related fields on events that come after an out of order insertion.

Absence and Time Tracking Impacts

Workday doesn't automatically:

- Correct or reprocess events, jobs, steps, and services.
- Perform or re-evaluate calculations.
- Update or remove an absence, time off record, time record, or event that was rendered invalid or ineligible for a worker.

Out of order insertions can impact these functions:

- Worker absence and time off events, time events, historical absence balances, eligibility rules, accrual calculations, and time calculations.
- Historically run service steps that perform worker data changes.
- In-progress processes.

We recommend that you review existing absence and time tracking events to ensure there are no detrimental downstream impacts.

Related Information

Reference

2025R1 Feature Release Note: Out of Order Change Job

Example: Update Worker History for Terminated Employee

This example illustrates how to add staffing events in a terminated worker's history.

Context

Over the period of a year, you hire, promote, and terminate Mariana. After they leave the company, you need to add additional staffing events in the worker history to reflect changes that occurred before their termination. The changes affected their business title.

You can add these events, without rescinding the promotion or termination, as long as they don't affect the supervisory organization or position of the worker.

Prerequisites

Create these events in the worker history for Mariana:

1. Hire on January 15.
2. Promotion, with a position and business title change, on April 15.
3. Future-dated termination on December 1.

Steps

1. Access the Change Business Title task.
2. Select Mariana as the Worker.
3. Click OK.
4. Set the Effective Date to January 20.
5. In the Business Title field, enter *Sales Manager*.

   Now the title is accurate for their initial months on the job. The title change is only effective until the promotion of the worker on April 15, when their position and business title change to *Regional Sales Manager*.

Result

You can see the new event by selecting Worker History > View Worker History from the related actions menu for the worker.

Headcount Plans

Steps: Set Up Security for HCM Headcount Plans

Prerequisites

Note: This headcount plan functionality is for HCM customers without a subscription to Planning. See Workday Community: Adaptive Planning Hub.

Context

Set up security to determine who can create and edit basic headcount plans and who can view and analyze plan data.

Steps

1. Access the Maintain Functional Areas task.

   Select the Enabled check box for the Headcount Plans (HCM) functional area. You can only enable 1 headcount plan functional area at a time. If you enabled the Headcount Plans functional area, clear the Enabled check box for that functional area.

   Security: *Security Configuration* domain in the System functional area.
2. Create Segment-Based Security Groups.

   Create a segment-based security group for users who need access to HCM headcount plans using these values:

Option	Description
Security Groups	Add the security groups who need access to HCM headcount plans.
Access to Segments	Select *Headcount Plan Type Segment*.

3. Edit Domain Security Policies

   Configure the domain security policies for these domains in the Headcount Plans (HCM) functional area:

   - *Access Plan Type (Segmented)*
   - *Process: Headcount Plan (HCM)*
   - *Reports: Headcount Plan (HCM)*
   - *Set Up: Headcount Plan (HCM)*

   For the *Access Plan Type (Segmented)* domain, add a new row on the Report/Task Permissions grid for the segment-based security group you just created. Give this security group View and Modify access.
4. Edit Business Process Security Policies.

   Set up the *Headcount Plan Event* business process and security policy based on your organization needs, such as to add approvers for your HCM headcount plans.
5. Activate Pending Security Policy Changes.
6. To use HCM headcount plan reports, access the Map Standard Aliases task.

   Map the standard alias for the Supervisory Organization business object. We recommend that you map the top level of your supervisory organization hierarchy.

   Security: *Aliases* domain in the System functional area.

Steps: Create Headcount Plans for HCM

Prerequisites

Note: This headcount plan functionality is for HCM customers without a subscription to Planning. See Workday Community: Adaptive Planning Hub.

Enable the Headcount Plans (HCM) functional area and set up security.

Context

You can create, maintain, and report on basic headcount plans in Workday as part of your HCM subscription. You can create headcount plans for any staffing model, and select different statistic types, such as cost of workforce. You can also establish the driving organization for your plan, such as cost center or supervisory organization, and set various dimensions and time frames. You can also import existing plan data from an external source using web services or use existing Workday reports to populate your plan.

Steps

1. Create Headcount Plan Structures for HCM on page 950.
2. Create Templates for HCM Headcount Plans on page 953.
3. Add your plan data.

   You can import external data into your plan using the *Import Headcount Plans* web service. You can also export Workday report data, and then import the data back into your plan with this web service.

   If you use the web service, don't select the Generate Spreadsheet with Data check box when you generate your spreadsheet template.
4. (Optional) Maintain Headcount Plans for HCM on page 954.

   Update or change the imported plan data.

5. Submit headcount plans for approval.

   Once the planners review the plan, the plan follows the business process you set up for your plan. Any planner or plan administrator that has access to the top plan hierarchy can submit a plan using the Submit Headcount Plans business process.

   When the approver:

   - Approves the plan: Plan changes to Available status. It's no longer available for edits in the Maintain Headcount Plans (HCM) task.
   - Denies the plan: Planners and plan administrators can make changes to the plan. Planners with submit privileges, can resubmit the plan for approval.

   Security: *Headcount Plans (HCM)* domain in the Headcount Plans (HCM) functional area.
6. (Optional) Copy an existing plan.

   You can copy an existing plan to create a new plan that includes all plan lines from the original plan. The plan status for the new plan is in Draft.

   Security: *Set Up: Headcount Plan (HCM)* domain in the Headcount Plans (HCM) functional area.
7. Report on your headcount plans.

   See: Concept: Headcount Plan Reports for HCM on page 956

Create Headcount Plan Structures for HCM

Prerequisites

- Set up headcount plan type on the Maintain Entry Types task.
- Security: *Setup: Headcount Plan (HCM)* domain in the Headcount Plans (HCM) functional area.

Context

For HCM headcount plans, the plan structure is the foundation upon which you build your headcount plan. On the plan structure, you can define the rules of applicable and relevant headcount dimensions and the timeframe you want to plan by.

Steps

1. Access the Create Plan Structure task.
2. Enter plan structure details.

Option	Description
Name	If you use various organizing dimensions for planning, consider naming your structure using the organizing dimension type so that it's easily identifiable for reuse.
Plan Type	Select *Headcount* as your Plan Type. Workday automatically selects Use Amendments/ Approval for all headcount plans.

3. Enter Schedule details.

   The schedule options available match the options of a financial plan type structure so that you can align your financial and headcount plans.

Option	Description
Schedule	Select the time frame for the headcount plan that you're going to create from this structure.

Option	Description
	Workday uses the fiscal schedule together with the plan entry selection and plan time frame to create plan periods and duration. Your selection for the headcount plan matches the fiscal schedule for the company, as set using the Edit Company Accounting Details task. Using fiscal year is useful when aligning your financial and headcount plans.
Plan Entry By	Select how you want to define your plan periods. These periods serve as your milestones for how frequently you want to track your headcount plan data. Workday uses your selection to create each entry period that you define a headcount plan for. Workday bases the headcount plan periods on: • *Period*: The periods of the fiscal schedule. • *Summary Schedule*: A summarized group of fiscal periods, such as quarterly or half yearly.

4. Select an Organizing Dimension Type.

   The driving dimension for your plan that you want to measure your headcount by. Workday automatically adds the dimension you select here as another dimension on the Structured Dimensions grid. In the grid, the organizing dimension is read only. You can further refine organizing dimension criteria when you create the template for your plan.
5. Enter dimension details on the Structured Dimension grid.

Option	Description
Order	Move dimensions up or down in the structured grid based on the column order that you want for the plan.
Dimension	Workday supports numerous dimensions for headcount planning. Select those dimensions most critical to your business. Example: If you want to align your headcount plan with your financial plan, add *Cost Center* as a dimension. Or, if you're most concerned about the distribution of your workers around the world, you might select *Location* as another dimension. You can only add *Employee* as a dimension if you also add *Position* as a dimension. You can't add *Employee* as a required dimension. Note: The more dimensions you use and the more values that exist for each selected dimension, the more complex your plan becomes.
Required	You can make a dimension required or optional. Workday automatically selects

Option	Description
	required for the Organizing Dimension Type and changes the required option to read only. For any required dimensions, planners must include a value for that dimension in all rows as they work in the plan. When maintaining your plan, Workday treats dimensions without data differently for this setting: • For optional dimensions without data, Workday displays all plan lines, including plan lines for dimensions that don't contain data. • For required dimensions without data, Workday doesn't display any plan lines, even if other dimensions contain data.
Primary Worktag	Select this option for the dimensions that you want to display as standalone columns in the maintain plan task. You can select up to 10 primary dimensions. Dimensions that you don't identify as primary display together in the Worktags column in the maintain plan task. You can set primary worktags in this task only. The primary worktag option isn't available when loading data using the *Import Headcount Plan* web service.
Hierarchy	Select the specific hierarchy within the selected dimension that you want to target for your plan. Some dimensions might not include hierarchies, in which case Workday disables the hierarchy fields, such as for *Worker Type*. Top Level Hierarchy: Select the uppermost hierarchy level at which to plan. If the dimension doesn't allow hierarchies, you can't select a top-level hierarchy. Hierarchy Level: For some dimensions that are organizations, within the top-level hierarchy you select, you can plan at the hierarchy level or at a node level.
Members to Include/Exclude	Select the specific values that you want to include for each dimension. You can include all members for each dimension or just a few so that planners can only enter the dimension values that you select.

Result

You can use this structure repeatedly to generate multiple headcount plans.

Next Steps

Create a plan template, which builds the shell in which you'll enter or import your headcount plan data.

Create Templates for HCM Headcount Plans

Prerequisites

- Create a plan structure for your plan.
- Security: *Set Up: Headcount Planning* domain in the Headcount Plans (HCM) functional area.

Context

Once you outline the parameters of your plan on the plan structure, you can further specify organizational, timeframe, and other headcount details for your plan. In Workday, the plan template creates an empty plan into which you can import your plan data.

Steps

1. Access the Create Plan Template task.
2. Select the headcount plan structure to use for your template.

   Workday populates the Organizing Dimension Type for you from the plan structure that you selected.
3. As you complete the task, consider:

Option	Description
Organizations As Of	For your plan, this date drives what you can pick in your top plan hierarchy for the selected organizations. You can select a moment in time where organizations might be different based on future organizations that you added or removed from a plan structure. Controls the organizations that are effective as of the date you enter here. You can change the prepopulated current date to any date.
Top Plan Hierarchy	Select the highest level organization that you want for your plan based on the organizing dimension you selected in the plan structure. Doing so enables you to limit your plan to a lower-level hierarchy than the highest level organization available to you. The prompt displays only the allowed hierarchies for the organizing dimension and the date you selected in the Organizations As Of field.
Organizations	You can limit your plan to specific organizations within the top plan hierarchy that you selected. Or, you can select Include All Organizations so that you can plan by all organizations within that hierarchy. Options include: • Any and all levels for supervisory organizations since it's a true hierarchy. • All nodes on cost center hierarchies and custom organization hierarchies.

Option	Description
Statistic Type	You can select 1 or more statistic types for your plan: • FTE: Can be a partial person, such as 50% time. Workday displays results up to 4 decimal places. If you plan to create a position-based plan, select FTE. FTE workers can split time between organizations. • Headcount: To count workers that work for only a single organization, select headcount. Always a whole number. • Cost of Workforce: Select if you want to add workforce costs to your plan. Prepopulates your plan with the current annual compensation amounts of individual workers. In the final plan workbook, you can manually replace the amounts Workday populates with additional workforce costs to include total compensation amounts that you want on the plan. Doing so gives you a more comprehensive assessment of the total cost of your workforce.
From To	Select the year and the summary periods. The available options are based on the configuration in the plan structure.

Result

Workday creates an empty plan into which you can now enter headcount plan data.

Next Steps

Import existing headcount data into Workday using the *Import Headcount Plan* web service or use the Maintain Headcount Plan (HCM) task.

Related Information

Tasks

Create Headcount Plan Structures for HCM on page 950

Maintain Headcount Plans for HCM

Prerequisites

- Create a plan template.
- Security: *Process: Headcount Plan (HCM)* domain in the Headcount Plans (HCM) functional area.

Context

As a plan administrator or planner, you can view and change headcount plans. Workday enables you to select your plan structure and plan. You can first filter the plan to control the columns that display in the grid. Additional filters enable you to control the plan lines that display in the grid.

Filtering the information lets you specify the data that you want to view or change. Your filter criteria determines the plan details that are displayed in a grid.

Steps

1. Access the Maintain Headcount Plan (HCM) task.
2. Select a Plan Structure from the *Headcount Plan Structures* available.
3. Select a Plan.

   Workday populates data based on your plan structure and plan template.

   If it's a multi-year plan, the Year prompt displays the earliest year in the plan by default. Available periods are based on the year you select.
4. Select the filters to create the structure of the grid.

   You must have at least 1 value in each field.

Option	Description
Year	Year of the plan. You can select a different year in the plan, if available. If it's a multi-year plan, you can only select a single year.
Period	Plan periods in the selected year. Remove periods if you don't want to view or change the information in your plan. If you delete 1 or more lines from the plan grid that displays, Workday deletes the plan line for all associated periods and not just the periods on the plan grid. To undo this change, select Search.
Statistic Type	Plan by number of FTE, headcount, or cost of workforce. Available options depend on what's in your plan structure. Remove an option if you don't want to view or change the information in your plan.
5. Select the filters you want to display in your headcount plan grid:

Option	Description
Organization	Select 1 or more available organizations to view or change in your plan. Workday displays only those organizations that are available to you. Organizations control the rows that display in the grid. Select at least 1 organization for the grid to display plan lines.
Company	This filter only displays if your plan structure has *Company* as a dimension.
Worktags	(Optional) Select 1 or more dimensions. You can only select dimensions that are in the plan structure. In the plan structure, you can set a dimension as a primary worktag. Workday displays dimensions identified as primary worktags as separate columns on the grid. Non-primary worktags are displayed under 1 column called Worktags.

6. Select Search.

   A grid displays your headcount plan based on your filters.
7. View or change the plan data in the grid:

   - Organization: Select a different organization. You can only have 1 organization in each row. Organizations you selected in the Organization filter are the options you can select in the grid.
   - Worktag: Remove or add dimensions. You can only select dimensions that are in the plan structure. All required dimensions must have values.

   Note: If you change any values in the grid and then select different filters, all updates you made in the grid are lost if you select Search again. You must select OK to save your changes. Workday recommends that you complete the task and update the plan again, if needed.
8. Change the statistic value for each period as needed.

   As you make changes to your plan, consider:

   - For headcount: You plan at the position level, and you plan to fill a position for a period. Enter 1 in the cell for the period. Otherwise, enter a zero if the position is unfilled.
   - For FTE: You plan at the position level, and you plan to fill a position in a corresponding period. Enter the value you expect the position to be filled at for that period. Example: Enter 0.5 for a part-time worker. If the position is unfilled, enter a zero.
   - For cost of workforce: You plan at the position level, and you plan to fill a position in a corresponding period. Enter the cost for that period; otherwise enter zero. Workday automatically uses your tenant's default currency and supports only that currency.

   Workday automatically populates a statistic cell with a zero if the cell is empty.

Result

Workday saves the headcount plan. You can continue to change your plan using this task if the plan is in draft or denied status.

Next Steps

- View the View Headcount Plan report to verify your plan details.
- Submit your plan for approval using the Submit Headcount Plan task.

Related Information
Tasks
Create Templates for HCM Headcount Plans on page 953

Concept: Headcount Plan Reports for HCM

Workday delivers 3 headcount plan reports (secured to the *Reports: HCM Headcount Plans* domain) to provide insight into your current and future headcount.

Report	Description
Headcount Activity for Plan	Provides a view of headcount and FTE movement by supervisory organization between periods. The plan structure for the plan you're reporting on must include *Supervisory Organization* as a required dimension. This report enables you to assess risks and challenges by giving you insight into these changes: • Actual and planned headcount. • Gains and losses.

Report	Description
	• Variances. You can configure supervisory organizations as top-level nodes to support outlining. The report includes the Plan Lines for Financial Reporting and Trended Worker report data sources. You can copy these subreports to create additional custom, matrix, and composite reports: • Headcount Activity Actuals - Sub Report • Headcount Activity Actuals Snapshot - Sub Report • Headcount Activity Planned - Sub Report You can also copy the entire composite report to create a custom report. For these custom reports, you must configure your Trended Workers organization report fields on the Organizations tab of the Maintain Trended Workers task.
Headcount Plan to Actuals	Compares actual and planned headcounts and variances by supervisory organization between quarters for both headcount and FTE. The plan structure for the plan you're reporting on must include *Supervisory Organization* as a required dimension. With this report you can: • Drill down on values and metrics. • Configure supervisory organizations as top-level nodes to support outlining. The report includes the Plan Lines for Financial Reporting and Trended Worker report data sources. You can copy this composite report to create a custom report. When you do so, Workday automatically includes these subreports: • Plan Report - Sub Report • Trended Headcount Snapshot for Plan - Sub Report For these custom reports, you must configure your Trended Workers organization report fields on the Organizations tab of the Maintain Trended Workers task.
View Headcount Plan	Displays headcount plan details by organizing dimension and the plan periods that you select in the plan structure.

Related Information

Tasks

Create Custom Reports

Create Headcount Plan Structures for HCM on page 950

Reference: Headcount Plan Dimensions for HCM

Workday delivers many dimensions that you can use when setting up the structure for your headcount plans. The delivered dimensions for HCM headcount plans are:

• Business Unit • Company • Compensation Grade • Contingent Worker Type • Cost Center • County • Custom Organization (1-10) • Employee (Name)	• Employee Type • Fund • Gift • Grant • Is Manager • Is People Manager • Job Category • Job Family	• Job Family Group • Job Level • Job Profile • Location • Management Level • Pay Rate Type • Position • Program	• Project • Region • Supervisory Organization • Work Shift • Worker Type

Related Information

Tasks

Create Headcount Plan Structures for HCM on page 950

HR Partner Hub

Steps: Set Up HR Partner Hub

Prerequisites

Security: *Worker Data: HR Partner Hub* domain in the Staffing functional area.

Context

You can configure the HR Partner Hub as a single point of access to workforce movement data and reports.

Steps

1. Edit Domain Security Policies.

   Configure the *Worker Data: HR Partner Hub* domain in the Staffing functional area.

   Note: If you can't access a security policy for the domain, you'll need to create it using the Create Security Policy for Domain task.
2. Set Up Hubs.

   You can:

   - Add an announcement.
   - Hide navigation items.
   - Hide or replace dashboards, reports, or suggested links.
   - Configure the overflow menus of the cards and remove cards you don't want to use on the Content tab.

3. (Optional) Configure dashboards to access from the hub.

   See ../../../manage-workday/tenant-configuration/navigation/tar1423086679639.dita.

Result

You can access the:

- Default or configured dashboards and suggested links.
- Reports to view and manage business process events.

Related Information

Concepts

Concept: Security Policies

Tasks

Steps: Set Up Dashboards and Landing Pages

Reference

Reference: HR Partner Hub Security and Data Sources on page 961

Reference: Workforce Composition Dashboards on page 1817

2023R2 What's New Post: HR Partner Hub

Concept: HR Partner Hub

The HR Partner Hub is a workspace for HR partners to access information on workforce movement and composition. You can use the hub to:

- View these past-dated, in-progress, and upcoming workforce movement events:
  - Change job.
  - Move workers.
  - Workers joining.
  - Workers leaving.
- Access detailed reports on these events, including information on the worker and business process.
- Gain insight into key workforce metrics for the next 3 months, such as open job requisitions and workers joining and leaving.
- Navigate to dashboards and suggested links.

Note: The filter on the overview page filters results in the list cards and in the corresponding reports, but not the metrics. Select your filtering options each time you access the hub, as the filter resets after every session. For best performance results, we recommend entering a short time range.

Employee Movement Cards and Reports

The delivered cards and reports provide information on upcoming workforce changes. By default, the cards display a maximum 50 events for the next 30 days. You can adjust the timeframe using the filter on the overview page of the hub.

You can configure an overflow menu of a card to link to relevant tasks, reports, dashboards, and external links. Workday links each card to its corresponding report, where you can access all upcoming events. The reports provide information on:

- The worker.
- The business process and its status.
- The current step, pending steps, and awaiting persons for in-progress transactions.
- Your action items, which you can manage without leaving the hub.

The reports and cards display relevant events for these business processes:

View Workers Joining Events	View Workers Leaving Events	View Change Job and Move Workers Events
• *Hire* • *Contract Contingent Worker* • Add Additional Job	• *Termination* • *End Contingent Worker Contract* • End Additional Job	• *Change Job* • *Move Workers (Supervisory)*

You can also replace the delivered reports in the hub with your custom reports using the Maintain Hubs report.

Workforce Metrics

The HR Partner Hub delivers data visualizations of completed events in the next 3 months for:

- Workers joining, including employees and contingent workers.
- Workers leaving, including voluntary and involuntary terminations.
- Open job requisitions, categorized by 4 sub-periods.

Note: The Open Job Requisitions metric doesn't display confidential, evergreen, or rescinded job requisitions, or requisitions with more than 1 opening. This metric is a copy of the existing Job Requisition Aging - Indexed report. It displays only the job requisitions that you can access through the supervisory organizations that are secured to the *Worker Data: HR Partner Hub* domain.

HR Partner Hub Dashboard and Suggested Links

The HR Partner Hub provides access to these workforce composition dashboards:

- Headcount Movement
- Distribution Trends and Analysis
- Performance and Potential
- Structure Dynamics

If you already have the dashboards configured, you'll have immediate access to them in the hub. Otherwise, you'll need to configure them to display when you're setting up the hub.

For users secured to the *Manage: People Analytics* or *View: People Analytics* domain, the HR Partner Hub delivers a default suggested link to People Analytics. You can hide this link or configure your preferred links.

Related Information
Tasks

Steps: Set Up Dashboards and Landing Pages

Steps: Set Up HR Partner Hub on page 958

Set Up Hubs

Reference

Reference: Workforce Composition Dashboards on page 1817

2023R2 What's New Post: HR Partner Hub

Reference: HR Partner Hub Security and Data Sources

Security Domains

Report Data Sources

Metrics Data Sources

Domains	Considerations
Worker Data: HR Partner Hub in the Staffing functional area.	Grants access to the HR Partner Hub. Restricted to these security group types: • Roles - Company Hierarchy • Roles - Cost Center • Roles - Cost Center Hierarchy • Roles - Custom • Roles - Custom/Financial • Roles - Custom/Staffing • Roles - Location Hierarchy • Roles - Region • Roles - Region Hierarchy • Roles - Supervisory • Unconstrained Groups Note: You can secure unconstrained security groups to the *Worker Data: HR Partner Hub* domain for configuration purposes. However, data display for these users only if they're also a member of a constrained role-based security group.
Security: *Set Up: Tenant Setup - Hub* domain in the System functional area.	Grants access within the Tenant Setup tasks to a Hub. Lets you configure the HR Partner Hub.
Indexed Data Source: Job Requisitions in the Staffing functional area. *Job Requisition Data* in the Pre-Hire Process functional area.	Grants access to the Job Requisition Aging report indexed for the Open Job Requisitions data visualization.
Manage: People Analytics in the People Analytics functional area. *View: People Analytics* in the People Analytics functional area.	Grants access to the default Suggested Link to People Analytics.

The HR Partner Hub includes this indexed report data source (RDS):

RDS	RDS Description	Primary Business Object	Security Domain	Workday Standard Reports Based on RDS
Completed Staffing Events for HCM Reporting	Returns 1 row for each staffing event. Includes all relevant staffing events for organizations that the user manages or support.	Staffing Event	*Worker Data: HR Partner Hub*	• Workers Joining in the Next 3 Months • Workers Leaving in the Next 3 Months

RDS	RDS Description	Primary Business Object	Security Domain	Workday Standard Reports Based on RDS
				You can access these reports only in the HR Partner Hub.

The Workforce Metrics data visualizations in the HR Partner Hub use these data sources:

Visualization	Data Source	Description	Primary Business Object
Workers Joining in the Next 3 Months	Completed Staffing Events for HCM Reporting (secured to the *Worker Data: HR Partner Hub* domain).	An indexed data source providing information on completed joining events for: • Employees. • Contingent workers.	Staffing Event
Workers Leaving in the Next 3 Months	Completed Staffing Events for HCM Reporting (secured to the *Worker Data: HR Partner Hub* domain).	An indexed data source providing information on these completed termination events: • Voluntary termination. • Involuntary termination.	Staffing Event
Open Job Requisitions	Job Requisitions - Indexed (secured to the *Job Requisition Data* and *Indexed Data Source: Job Requisitions* domains).	An indexed data source that returns completed job requisition events. This data source excludes these kinds of requisitions: • Rescinded. • Evergreen. • Confidential. • With more than 1 opening.	Job Requisition

Note: Workday might take several hours to update an indexed data source with the most recent data in your tenant.

Related Information

Concepts

Concept: Security Groups

Tasks

Steps: Set Up HR Partner Hub on page 958

Reference

2023R2 What's New Post: HR Partner Hub

The Next Level: Workforce Composition Dashboards

Ad Hoc Worker Communications

Setup Considerations: Ad Hoc Worker Communications

You can use this topic to help make decisions when planning your configuration and use of Ad Hoc Worker Communications. 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

Ad Hoc Worker Communications enables you to communicate time-sensitive messages to workers using email, mobile push notifications, and SMS.

Business Benefits

- Provides access to worker populations not easily reached through email alone, improving responsiveness.
- Enables you to communicate with workers using multiple channels simultaneously, driving efficiency in your communications.
- Reduces the need to use third-party vendors for messaging, enhancing convenience.
- Empowers you to apply email branding from notification and email templates, connecting your messages with the custom colors, graphics, and links that convey your company culture.
- Enables you to use message templates containing precomposed text, saving you time and helping you maintain consistency in your written communications.

Use Cases

- Create and send messages to workers by email, mobile push notifications, or SMS, or a combination of these channels.
- Issue time-sensitive communications to workers who may not have frequent access to email.
- Communicate company-wide announcements and critical reminders to up to 20,000 workers.
- Select an audience based on worker data. Examples: Job profile, location, supervisory organization.
- Select specific groups of workers for targeted messages from HR administrators.

Questions to Consider

Question	Consideration
Which channels do you want to use to communicate with workers?	All Workday HCM customers can send worker communications using email and mobile push notifications. To send messages by SMS, you must also be a customer of the Workday Messaging SKU. See: Steps: Set Up Ad Hoc Worker Communications on page 967.

Question	Consideration
How can you incorporate the branding for your organization onto the Send Worker Communications task?	You can apply your existing tenant branding by: • Configuring a branding rule. • Using the Configure Tenant Branding task to associate a banner with the rule.
What templates do you want to use to add email branding to worker messages?	When you access the Email Branding prompt on the Send Worker Communications task, you can select templates to add existing visual branding to your message. You can select: • Email templates. • Notification templates. To create and use notification templates, you must configure Notification Designer. See Concept: Email and Notification Templates in Worker Messaging.
How do you want to add text to your worker messages?	You can: • Write an ad hoc message, adding text directly into the fields for your selected contact methods on the Send Worker Communications task. • Select a message template, which will load precomposed text from the template into the draft message for each contact method. See Steps: Set Up Ad Hoc Worker Communications on page 967.
How can I send SMS messages to a worker's personal mobile phone?	By default, Workday delivers worker messages to work mobile phone numbers, but you can send messages to a worker's personal mobile phone if the worker: • Sets either their home or work phone as a Mobile device type and adds their personal mobile phone number. • Opts in to receive SMS notifications for this number. If a worker lists both a home and work mobile phone number, they can only select 1 for SMS notifications.
How can I use AI to help craft my Ad Hoc Worker Communications?	The Ad Hoc Worker Communications AI Text Editor provides two AI capability options: 1. Make Shorter - this can be applied to Push Notifications and SMS. 2. 2. Make Longer - this can be applied to expand email content. Both options are marked with a purple sparkle icon to indicate they use AI. Ensure best practices of reviewing, editing, and approving message content are established

Question	Consideration
	before communications are sent to worker populations. This approach aligns with keeping a “human in the loop” of any AI generated content, while simultaneously empowering communications creators to refine messages for various scenarios. See Concept: Ad Hoc Worker Communications with AI Text Editor on page 969

Recommendations

- Configure and test Ad Hoc Worker Communications in a non-production tenant before using the feature in your production tenant.
- The Send Worker Communications task enables you to send messages to up to 5,000 workers. To reach a maximum 20,000 recipients, select an existing saved search created on the Find Workers report.

  Ensure you're using the Workday-delivered Find Workers standard report; otherwise, the Send Message option won't be available.
- When creating the notification routing rule for your selected channels, select a default frequency of *Immediately*. Not doing so could affect the frequency of notifications for this channel across all your custom business processes.
- Assign role-based security groups to security policies to give the ability for users like managers or HR Partners to send communications.

Requirements

- You must configure Notification Designer to create and use notification templates.

  See Steps: Set Up Security for Notification Designer.
- Workers must opt in to receive SMS.

Limitations

- The SMS functionality in Ad Hoc Worker Communications is only available for U.S., UK, and Canadian mobile phone numbers.
- You can only use the Send Worker Communications task to send messages to work email addresses.

Tenant Setup

Access the Edit Tenant Setup - Notifications task to:

- Create a routing rule for *Ad Hoc Worker Messaging* by overriding the HCM parent notification type settings.
- Select 1 or more of these notification channels:
  - Email.
  - Mobile push notification.
  - SMS.

Security

Domains	Considerations
Ad Hoc Worker Messages in the Staffing functional area	Enables users in unconstrained security groups to access the Send Worker Communications task. You must secure access to this domain to access the Send Worker Communications task from the Find Workers report.
In the System functional area: • *Drive* • *Notification Designer*	Enable you to use Workday Drive and Notification Designer to create and select notification templates in Ad Hoc Worker Communications.
Manage SMS in the System functional area	Enables users in unconstrained security groups to access these reports: • All Outbound SMS Notifications • SMS Notification Event Rows Detail
Set Up: Message Templates in the System functional area	Enables you to use message templates in the Send Worker Communications task.

Business Processes

No impact.

Reporting

Report	Consideration
All Outbound SMS Notifications	View all outbound SMS notifications within a specified date range. Details include the: • Sender. • Recipient. • Phone number. • Message text. • Business process type.
Business Process and Integration Notifications Indexed	View details for all completed notifications for the specified date range, including: • Recipient Email. • Notification Template. • Message Template. • Email, Push Notification, and SMS Messages. • Channels. • Notification Subject.
SMS Notification Event Rows Detail	View all SMS notifications for the specified period. Details for each notification include the: • Time • Subject • Message • Recipient

Integrations

No impact.

Connections and Touchpoints

Features	Considerations
Drive	Drive enables you to create, share, and manage notification templates, which you can select when messaging workers.
Notification Designer	You can use Notification Designer to manage the layout, design, and content of notification templates.
Workday Messaging	Enables you to message workers by SMS.

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: Email Templates
Concept: Notification Designer
Tasks
Steps: Set Up Tenant Branding
Steps: Set Up Worker Messaging on page 967
Reference
Reference: Edit Tenant Setup - Notifications
Examples
24R1 What's New Post: Worker Messaging

Steps: Set Up Ad Hoc Worker Communications

Prerequisites

- Review setup considerations for Ad Hoc Worker Communications.
- Security: *Ad Hoc Worker Communications* domain in the Staffing functional area.

Context

When you set up Ad Hoc Worker Communications in Workday, you can communicate with workers through email, mobile push notifications, and SMS. To use the SMS communication channel, you must have access to the Workday Messaging SKU.

Steps

1. Edit Domain Security Policies.

   Configure a security policy for the *Ad Hoc Worker Communications* domain.

2. Access the Edit Tenant Setup - Notifications task.

   In Notification Delivery settings, select *HCM* and *Ad Hoc Worker Communications*. Select the check box to override parent notification type settings and clear the default rule. Create a notification routing rule and add your preferred communication channels with a default frequency of *Immediately*.

   Note: You must configure SMS notification settings before creating a notification routing rule if you want to send worker communications by SMS.

   See Reference: Edit Tenant Setup - Notifications and Steps: Set Up Workday Messaging.
3. (Optional) Set up Notification Designer.
   a) You must configure Notification Designer if you want to use notification templates to add email branding to worker messages.

      See Steps: Set Up Security for Notification Designer.
   b) Create and Activate Notification Templates.

      You can manage your notification templates using the Maintain Notification Templates task. In the *HCM* tab, select *Ad Hoc Worker Communications* in *Active for Notification Types* for your chosen templates.
4. (Optional) Set up message templates to enable you to use precomposed text in worker messages.
   a) Modify the security policy for the *Set Up: Message Templates* domain and create a segment-based security group. Grant the group access rights to the *Ad Hoc Worker Communications* segment.
   b) Access the Create Message Template task, name your template, and select *Ad Hoc Worker Communications* as the notification category.

   See Steps: Set Up Message Templates.
5. (Optional) To configure AI capabilities, see Set Up AI Text Editor on page 970

Result

Access the Send Worker Communications task, or select a saved search and use the Send Worker Communications button on the Find Workers standard report.

Related Information
Tasks
Steps: Set Up Drive

Concept: Email and Notification Templates in Ad Hoc Worker Communications

Workday enables you to use email and notification templates to add email branding when you send emails using the Send Worker Communications task. When you select a template, your worker message populates with visual elements from the template. Examples:

- Color
- Images
- Links

You can select both email and notification templates in Ad Hoc Worker Communications, but there are differences in the ways you create these templates.

Ad Hoc Worker Communications doesn't retrieve text from email or notification templates. To add precomposed text to a worker message, you can select a message template in the Send Worker Communications task.

To use AI to assist with drafting messages, see Concept: Ad Hoc Worker Communications with AI Text Editor on page 969.

You have the ability to assign role-based security groups to security policies giving the ability for users such as managers or HR Partners to send communications.

Email Templates

Email templates are a legacy functionality that you can use to define the branding elements, content, and layout you want to include in email notifications generated by Workday. Email templates use a row-based HTML process to create design elements that form a wrapper around the main body content of the template.

When you create an email template, you need to assign it an email template behavior, which specifies the purpose of the template. Examples: Default, job alerts, student engagement. The selected behavior determines the Workday-delivered dynamic content variables that you can use in the template. You can also define static content for each template, such as images and URLs, but you need to create the content in HTML outside of Workday and add it into the template.

Notification Templates

Notification Designer enables you to create, share, and collaboratively edit templates using:

- Prebuilt notification layouts.
- Custom layouts.

Notification Designer simplifies how you create templates using an intuitive graphical interface. You can create multiple templates for each notification type, and you can add and format content within the UI. Examples: Buttons, dynamic data content, images.

You can publish the notification and set the notification categories it's available for, so you don't need to create any content outside of Workday.

Related Information

Tasks

Create Email Templates

Steps: Set Up Security for Notification Designer

Examples

Workday Community: Get to Know Workday Notification Designer

Concept: Ad Hoc Worker Communications with AI Text Editor

Workday’s Send Worker Communications task enables organizations to communicate time sensitive messages to their workers using SMS, email, and push notifications. Within the task, various templates are enabled to help with precomposed content and templates that provide consistent visual branding for organizations.

Workday provides an AI enhancement to the Ad Hoc Worker Communications Text Editor if you want to use AI to assist in crafting your messages.

Workday uses Vertex AI models for this feature. These models are an approved subprocessor and Workday partner. More details are available on the Community Subprocessors page.

Note: This solution will not use any of your company data for training AI models.

AI Text Editor

The Ad Hoc Worker Communications AI Text Editor provides two options:

1. The option to expand on email messages using the assistive capabilities to help formulate additional content for messages when emailing.
2. The option to summarize and refine Push Notifications and SMS content for more concise messaging when sending shortened messages.

Note: SMS messaging capabilities are only available to customers of Workday’s Messaging.

Note: AI is experimental. Ensure best practices of reviewing, editing, and approving message content are established before communications are sent to worker populations. This approach aligns with keeping a 'human in the loop' of any AI generated content, while simultaneously empowering communications creators to refine messages for various scenarios.

When using Gen AI prompts to Make Shorter/Make Longer, don't add dynamic fields to the message prior to using the prompts. Dynamic fields are not retained in messages sent to the Vertex AI model. You can add dynamic fields as a final step after prompts are used.

If you need to revert AI generated content to the original content, use the CTRL-Z command once or twice in a row to revert.

Set Up AI Text Editor

Prerequisites

- Security:*AI- Ad Hoc Worker Communications* domain.
- If applicable, ../../../manage-workday/tenant-configuration/Machine-Learning-and-Innovation-Services/enable-innovation-services-feature-and-data-contribution.dita and opt-in to Ad Hoc Worker Communications.
- If you are a USMA Customer who would like to opt-out of the AI Text Editor, select the checkbox to opt-out of AI for Ad Hoc Worker Communications.

Context

The AI text editor gives you the ability to receive suggestions to make your message longer (for emails) or shorter (for push notification and SMS).

Steps

To Configure AI capabilities for the Text Editor:

1. Opt-in when applicable to the Innovation Services Agreement.
2. Navigate to the AI- Ad Hoc Worker Communications domain.
3. Select the related actions button for Create Security Policy.
4. Select the Confirm checkbox, then selectOK.
5. Confirm the Security Groups under Report/Task Permissions, select OK, then select Done.
6. Complete the steps for Activate Pending Security Policy Changes.

Result

After you set up the AI Text Editor, you can use AI to help refine your Ad Hoc Worker Communications.

Next Steps

To allow role-based Manager and HR Partner security groups to send communications:

- Add the appropriate constrained security groups to the security policy defined for the Ad Hoc Worker Communications domain.
- For HR Partners, if location based intersection security groups apply, they need to be enabled within the security policy.
- For Managers, to allow the ability to send communications to both primary and subordinate organizations, the appropriate role-based security group with the access rights for those organizations would need to be enabled within the security policy.

To enable the AI Text Editor for role-based users, the security policy for the AI Ad Hoc Worker Communications domain would also need to have the above security groups enabled.

When role-based Managers or HR Partners access the Send Worker Communications task, the option to select from existing Saved Searches will require the entry point to be from the Find Workers report. The Saved Searches selector will not be available within the task. Select your Saved Searches from the

Find Workers report and ensure the Results checkbox is selected before proceeding to select the Send Message button. Once you select the Send Message button, the recipient count and worker listing on the Send Workers Communications page will only show recipients the user is allowed to send communications to.

Related Information
Examples
Ad Hoc Worker Communications with AI Text Editor

Retirees

Retire an Employee

Prerequisites

- Configure the *Add Retiree Status* business process and security policy in the Staffing functional area.
- Create a retiree organization and assign support roles to it , such as Retiree Administrator and Retiree Partner, using the Create Retiree Organization task.
- Create reasons for adding retiree status using the Maintain Event Categories and Reasons task.
- Terminate the employee.

Context

You can assign retiree status to a terminated employee in 2 ways:

- Add the *Add Retiree Status* business process to the *Termination* business process as an optional step after the completion step. In the Maintain Termination Categories task, select the Retirement check box next to reasons that you want to use to track retirees.
- Run the Add Retiree Status task.

Steps

1. Access the Add Retiree Status task and select the terminated employee.

   Workday recommends you only assign retiree status to termination events or terminated workers.
2. Specify an Effective Date at least one day after the termination date.
3. Select a Reason and Retiree Organization.

Result

The employee receives the *Retiree as Self* and *All Retirees* roles. Workday automatically places the employee in the retiree organization.

The worker is still displayed in the historical information for their previous organization.

Next Steps

You can correct or reverse the retiree status. From the employee's related actions menu, select Worker History > View Worker History; then select either Correct or Rescind as a related action on the *Add Retiree Status* event.

Related Information
Tasks
Set Up Nonsupervisory Organizations
Terminate Employees on page 699

Rehire a Retiree

Prerequisites

- Configure the *Remove Retiree Status* business process and security policy in the Staffing functional area.
- Create reasons for removing retiree status using the Maintain Event Categories and Reasons task.

Context

You can remove the retiree status from an employee in 2 ways:

- Add the *Remove Retiree Status* business process to the *Hire*, *Contract Contingent Worker*, or *Edit Position* business processes as an optional step after the completion step.
- Run the Remove Retiree Status task.

Steps

1. Access the Remove Retiree Status task.
2. Select the retired employee.

   Workday recommends you only remove retiree status from retired workers who are being rehired or who have already been rehired.
3. Specify an Effective Date and Reason.

Result

Workday removes the *Retiree as Self* and *All Retirees* roles from the worker, and removes the worker from the retiree organization.

Next Steps

When you use the Add Retiree Status task on an active worker who has been previously terminated, the worker status displays as (Retired - Active).

You can correct or reverse the removal of the retiree status. From the employee's related actions menu, select Worker History > View Worker History; then select either Correct or Rescind as a related action on the *Remove Retiree Status* event.

If you need to postpone a worker's termination date, we don't recommend removing retiree status. Instead, correct the *Add Retiree Status* and then correct the *Termination* event.

Related Information
Tasks
Correct Staffing Events on page 939

Staffing FAQs

FAQ: Pre-Hire Segmented Security

What's a Constrained Pre-Hire?

A constrained Pre-Hire is a Pre-Hire that’s associated with an organization in Workday:

- If Hired: Workday associates them with the organization into which they’ve been hired
- If Terminated: Workday associates them with the organization into which they were hired
- In Progress Hire: Workday associates them with the organization targeted for the hire.

- In Progress Hire Offer/Employment Agreement: Workday associates them with the organization from the job requisition used in the hire.

What is an Unconstrained Pre-Hire?

An unconstrained Pre-Hire is a Pre-Hire that has no association with an organization in Workday. Example: A Pre-Hire that an authorised user creates using the *Create Pre-Hire* task. An authorised user with access to any Pre-Hire has visibility of all unconstrained Pre-Hires.

How does this feature impact a worker with an unconstrained security group?

Workers with an unconstrained security role (Example: HR Admins who operate across the company) won't experience any changes to their access to Pre-Hires following opt-in to the enhancements. Their unconstrained security role ensures that they can view both constrained Pre-Hires (regardless of their organization) and unconstrained Pre-Hires.

How does this feature impact a worker with a constrained security group?

Previously, workers with a constrained security group (Example: A Manager who operates within an organization) can only view Pre-Hires within the organization to which they have access plus any unconstrained Pre-Hires. Workday now enables customers to configure which workers can access unconstrained Pre-Hires.

Are there any exceptions to the Pre-Hire security logic?

There may be some exceptions to this enhanced Pre-Hire security logic throughout Workday applications, where the business logic would not benefit from this enhancement. Examples: *Background Check*, *Contract Contingent Worker*, *Hire Employee*, *Offer*.

In these cases, your authorized users need access to all Pre-Hires in your tenant (including any terminated worker Pre-Hire profiles) to mitigate against the creation of duplicate Pre-Hire profiles and support the hire and recruitment processes effectively. This enhancement could potentially introduce a poor experience. Example: Where an authorized user can create a Pre-Hire but not hire them. To prevent this, Workday maintains the existing security that governs access to the task, regardless of whether the customer opts into this enhancement . Provided the user has access to the tasks and Pre-Hire security domains, they'll continue to have access to both constrained and unconstrained Pre-Hires within these tasks and processes.

How does restricting access to unconstrained Pre-Hires impact the recruitment process and duplicate management functionality?

The duplicate management functionality arises when a newly created Pre-Hire (through a new application) matches key criteria of an existing Pre-Hire. Workday considers a Pre-Hire that's created through the recruitment process to be a constrained Pre-Hire.

- Where the recruiter has constrained security access, the existing process is maintained. Provided the recruiter has appropriate access to the organisation of the legacy Pre-Hire profile (existing process), the duplicate management functionality works as expected.
- Where the recruiter has constrained security access and they don't have access to the organizations of the legacy Pre-Hire profile, the duplicate management functionality may not work. However, this would be an existing restriction around access to legacy Pre-Hire profiles.
- Where the recruiter has unconstrained security access, they can see the Pre-Hires associated with all and no organizations, assuming there's no negative impact to duplicate management.

How does this enhancement impact the Create Pre-Hire task and duplicate management functionality?

When an authorised user accesses the stand-alone *Create Pre-Hire* task after opting into the feature, they'll lose access to any Pre-Hires they create unless they can access the necessary domains as listed below.

If they attempt to hire a Pre-Hire using the *Hire Employee* task or the recruitment process, they'll be able to access and complete the process as normal. When a user creates a new Pre-Hire with the same name and country as an existing Pre-Hire, Workday triggers the 'Pre-Hire already exists' exception, regardless of their security configuration.

How can I ensure a worker with a Constrained Security Group can access Unconstrained Pre-Hires?

1. Access the *Create Security Group* task.
2. Create a segment-based security group using the new Unconstrained Pre-Hire segment: From the Access to Segments drop-down menu, select Security Segments (Workday Owned) > Pre-Hire Security Segment.
3. Add the unconstrained security group (Example: *Manager (Unconstrained)*) for the required role (Example: *Manager* role) to the Unconstrained Pre-Hire Segment-Based Security group.
4. Identify the security domains or business process security policies that are impacted or control access to the task, data, or business process for which they want the role to retain access.
5. Add the new segmented Pre-Hire security group to the appropriate domain security policy or business process policy, ensuring that they provide the required level of access (Example: *View* and *Modify*).

Recommendations:

- To ensure the existing constrained security access is retained, the original security group should be left in place.
- If opted in, segment-based security configuration should be the same for these tasks:
    - *Create Pre-Hire*
    - *Edit Pre-Hire*
    - *View Pre-Hire*

Any inconsistency in the segment configuration across these tasks may result in unexpected behaviour. Example: A user can create a Pre-Hire, but lose editing access to their profile.

Which security domains should I update for this enhancement?

In order to correctly implement this enhancement, we strongly recommend that you update these domains as according to your organization's needs:

- *Manage: Expense Report for Pre-Hire*
- *Manage Pre-Hire Data (User-Based Groups only)*
- *Manage Pre-Hire Process*
    - *Manage Pre-Hire Process: Consider Pre-Hires*
    - *Manage Pre-Hire Process: Enter Pre-Hire Interviews*
    - *Manage Pre-Hire Process: Hire Eligibility Status Comment*
    - *Manage Pre-Hire Process: Manage Pre-Hires*
    - *Manage Pre-Hire Process: Pre-Hire Eligibility*
    - *Manage Pre-Hire Process: View Pre-Hire*
    - *Manage Pre-Hire Process: View Pre-Hire Interviews*
    - *Manage Pre-Hire Process: Worker Hire Eligibility*
- *Offer / Employment Agreement: Collective Agreement*
- *Offer / Employment Agreement: Employee Contracts*

- *Offer / Employment Agreement: Notice Period*
- *Offer / Employment Agreement: Probation Period*
- *Pre-Hire Data: Employment Agreement*
    - *Pre-Hire Data: Business Title*
    - *Pre-Hire Data: End Date*
    - *Pre-Hire Data: Scheduled Weekly Hours*
    - *Pre-Hire Data: Start Date and Location*
    - *Pre-Hire Data: Term Time*
- *Pre-Hire Data: Name and Contact Information*
    - *Pre Hire Data: Names*
    - *Pre Hire Data: Contact Information*
- *Pre-Hire Demographics by Organization*
- *Pre-Hire Personal Data*
    - *Pre-Hire Personal Data: Age/Marital Status*
    - *Pre-Hire Personal Data: Ethnicity/Disability/Religion/Country of Birth*
    - *Pre-Hire Personal Data: Gender*
    - *Pre-Hire Personal Data: ID Information*
    - *Pre-Hire Personal Data: Medical Exams*
    - *Pre-Hire Personal Data: Military/Citizenship/Political/Nationalities*
    - *Pre-Hire Personal Data: Personal Information*
    - *Pre-Hire Personal Data: Sexual Orientation & Gender Identity*
    - *Pre-Hire Personal Data: Social Benefits Locality*
    - *Pre-Hire Personal Data: Web Services with Details*
- *Pre-Hire Process Development*
- *Pre-Hire Process: Mass Action on Job Requisitions*
- *Pre-Hire: Skills and Experience*
- *Reports: Job Requisition and Positions*
    - *Reports: Manager (Pre-Hire)*
    - *Reports: Open Positions*
- *Set Up: Pre-Hire Process*

These domains are for unconstrained security groups and aren't impacted:

- *Manage Pre-Hire Data: Delete Pre-Hires*
- *Manage Pre-Hire Data: Mark Pre-Hires for Deletion*
- *Pre-Hire Data: Background Check Status*
- *Search: Pre-Hire by Private Email Address*

Do I need to update my business process security policy?

Yes, we recommend that you update your business process security policy if you've opted into this feature.

How does this enhancement affect my web services?

If a constrained role is used to submit the web service request, access to the unconstrained Pre-Hire should be configured on the domain securing the web service, as outlined above. If an unconstrained role is used to submit the web service, no update is required.

FAQ: How Does the Conversion Position Start Date Field Work?

The Conversion Position Start Date field is workers' start date for the current position and you can use this field to calculate the time in position. This date must be after the hire date.

During implementation, Workday displays a Conversion Position Start Date field for workers whose hire date differs from their current position start date. This field enables you to report on the actual length of time workers have been in their current position. Example:

- You hired Steve in 1999 as a business analyst.
- Steve became a product manager in 2005.
- The company Steve works for went live on Workday in 2012.
- To reflect how long Steve has been a product manager, set the hire date for Steve to 1999 and set the conversion position start date to 2005.

To update the conversion position start date for workers after implementation:

- Correct the *Hire* or *Contract Contingent Worker* business process. From the related actions menu of the *Hire* or *Contract Contingent Worker* event in a worker's history, select Business Process > Correct.
- Use the *Correct Hire* or *Correct Contract Contingent Worker* web service (secured to the new Staffing Actions: Correct Contract Contingent Worker and Hire domain). You can use these web services to correct the conversion position date for completed events as a mass action.

FAQ: Supervisory Organizations and Staffing Events

Can Nonsupervisory Roles Perform Staffing Tasks?

Nonsupervisory roles are roles that are on an organization that's not supervisory. Nonsupervisory roles can only perform staffing tasks for workers and positions in associated supervisory organizations linked to the nonsupervisory role through the:

- Company or Company Hierarchy
- Cost Center or Cost Center Hierarchy
- Location Hierarchy
- Region or Region Hierarchy
- Custom Organization
- Matrix Organization
- Pay Group
- Retiree Organization

Access the Business Process Security Policies for Functional Area report and add the nonsupervisory roles to the security groups that can initiate these tasks.

Task	Location Hierarchy Restrictions	Other Nonsupervisory Organizations
Create Position Set Hiring Restrictions	You can only create positions or set hiring restrictions in a supervisory organization whose primary location is in a location hierarchy you can access.	Only staffing organization roles from the supervisory organization defaults can perform these tasks.
Add Job Contract Contingent Worker Hire Employee Start International Assignment	The position or hiring restrictions must be either: • Associated with a business site location in a location hierarchy you can access. • Unassociated with a specific business site location.	The position or hiring restrictions must be in the nonsupervisory organization.

Task	Location Hierarchy Restrictions	Other Nonsupervisory Organizations
All other worker-based tasks, such as Change Contact Information	The worker's position must be in a business site location in a location hierarchy you can access.	The worker's position must be in the nonsupervisory organization.
All other position-based tasks, such as Edit Position and Change Job	The position must be in a business site location in a location hierarchy you can access. If you use the Change Job task to move a worker but not the position, the location hierarchy automatically populates from the first available of the: • Hierarchy associated with the proposed location. • Hierarchies associated with the location hiring restrictions. • Hierarchy associated with the primary location of the proposed supervisory organization.	The position must be in the nonsupervisory organization. If you use the Change Job task to move a worker but not the position, only roles from the default organizations associated with the proposed supervisory organization can perform the task.

How Are Historical Staffing Events Secured?

Workday secures a staffing event to the organizations of the position. Users with roles on those organizations have access to those current and historical staffing events. To view events for a worker that's no longer part of the supervisory organization, use the View Supervisory Organization As Of task.

Example: A worker leaves Supervisory Organization A and joins Supervisory Organization B. You're an HR Partner whose role is based on Supervisory Organization B. You don't have a position or role on Supervisory Organization A. You don't have access to the historical staffing events completed when the worker was in Supervisory Organization A.

Related Information
Concepts

Concept: Roles, Time Zones, and Snapshots

Tasks

Edit Business Process Security Policies

Reference

Reference: Organization Types and Subtypes

FAQ: Can I control which job details are visible on worker profiles?

Yes, you can create a custom report that contains custom fields, and display that report on the worker profile using the Configure Profile Group task. You can also hide many fields on the Job Details tab of worker profiles using the Configure Optional Fields task.

See Hide or Require Optional Fields.

Related Information
Tasks

Steps: Set Up Profiles and Profile Groups

Troubleshooting: Staffing Tab Doesn't Display on a Supervisory Organization

Cause:

Cause	Solution
The role doesn't have the correct security permissions to view the Staffing tab on the Supervisory Organization profile.	1. Link the relevant roles to a security group with permissions on the *Worker Data: All Positions* domain in the Staffing functional area. 2. Link the relevant roles to a security group with permissions on at least 1 of these domains in the Organizations and Roles functional area: • *Manage: Supervisory Organization* • *Reports: Supervisory Organization View as of Date* 3. Modify the relevant roles so that they meet at least 1 of these criteria: • The roles are on the relevant supervisory organization. • The roles are on any of the superior supervisory organizations. • The roles are on a location hierarchy that includes the location for the supervisory organization. • The roles are on a location hierarchy that includes the location for any superior supervisory organizations.
The security group that grants permissions on the relevant domain security policies for the assigned role is in an intersection security group.	1. Grant all security groups in the intersection security group access to the *Worker Data: All Positions* domain in the Staffing functional area. 2. Grant all security groups in the intersection security group access to at least 1 of these domains in the Organizations and Roles functional area: • *Manage: Supervisory Organization* • *Reports: Supervisory Organization View as of Date*
There are no positions in the Supervisory Organization.	1. Wait until the business process completes after you create a position or change the position location on the Supervisory Organization. 2. Ensure that your role on the location hierarchy is in a security group that has access to the *Worker Data: All Positions* domain.

Compensation

Components: Elements and Eligibility Rules

Steps: Set Up Compensation Components

Context

Configure compensation frequencies, elements, and eligibility rules for your organization.

Steps

1. Create Frequencies on page 979.

   Define frequencies for use in compensation and payroll calculations.
2. Access the Maintain Units of Measure task.

   Define the units of measure for compensation plans with unit-based targets.

   Security: *Set Up: Unit of Measure* domain in the Common Financial Management functional area.
3. Create Compensation Elements on page 981.

   Compensation elements establish the link between compensation and payroll.
4. Create Compensation Packages on page 1044.
5. Create Eligibility Rules for Compensation on page 986.

   Define the rules that determine the employee groups eligible for compensation plans.
6. Assign Compensation Components to an Eligibility Rule on page 988.

   Assigning compensation components to an eligibility rule enables Workday to automatically populate default compensation values during business processes under certain conditions.
7. (Optional) Steps: Manage Compensation Basis on page 1133.
8. Set up security:

   - Segmented security: Set Up Segmented Security by Compensation Plans on page 1047.
   - Intersection security:

     Note: Workday doesn't recommend using intersection security for Compensation because it doesn't apply to all situations. One case where Workday can't evaluate intersection security is exclusion criteria, which depend on organizations. Many compensation components, including plans, grades, and pay ranges aren't associated with organizations. Managers can't have security over compensation components through organizations and roles the way they can for employees.

Related Information

Reference

Reference: Compensation Plan Comparisons on page 1064

Create Frequencies

Prerequisites

Security: *Set Up: Compensation General* domain in the Core Compensation functional area.

Context

You can maintain existing or create new frequencies for compensation and payroll calculations. Frequencies determine the number of occurrences (or units) in a year that Workday uses to calculate annual compensation.

Workday delivers a set of frequency types, including *Hourly* and *Semi-Monthly*. Each frequency requires an Annualization Factor that is greater than zero and specifies the number of occurrences in a year. Some frequencies, such as *Bi-weekly* and *Semi-monthly*, match pay cycles while other frequencies, including *Hourly* and *Annual*, don't. Examples:

- *Annual*: 1 time in a year.
- *Bi-weekly*: Every 2 weeks or 26 times in a year.
- *Semi-monthly*: 2 times every month or 24 times in a year.

You can modify these or add your own as needed. If the standard number of working hours differs by location, you can create a different hourly frequency for each location.

Steps

1. Access the Maintain Frequencies task.
2. As you complete the task, consider:

Option	Description
Annualization Factor	The number of units (occurrences) in a year. Workday uses the annualization factor to calculate annual compensation. You can enter up to 6 decimal places. The default annualization factor for *Hourly* is 2080, which equals the number of work hours in a year in the USA (40 hours each week * 52 weeks). Other locations might have different annualization factors for *Hourly*. Examples: • 1664 (32 hours each week * 52 weeks). • 1920 (40 hours each week * 48 weeks).
Use Weekly Hours	For *Hourly* frequency types. If selected, Workday uses the scheduled hours each week when calculating annual pay. Using weekly hours affects how Workday evaluates grade range penetration for an hourly worker, which is based on the annual equivalent of hourly pay. If cleared, Workday calculates the annual equivalent. If you use Workday Payroll, select this check box as a best practice for hourly workers. If you clear Use Weekly Hours, Workday might treat part-time, hourly workers as full-time. Example: For Commitments and Obligations, Workday might create commitments for part-time, hourly workers.
Used in Payroll Interface	Select the check box to make a frequency definition available for use in positions, earnings, and deductions that you set up for external payroll.

Example

Example: You schedule a worker to work 20 hours each week at 10 USD an hour. If you:

- Select Use Weekly Hours, Workday calculates the annual equivalent by multiplying hourly pay (10) by the scheduled weekly hours for the worker (20), then by the *Weekly* Annualization Factor (52):

  `10 USD * 20 hours * 52 weeks = 10,400.00 USD annual equivalent`
- Clear Use Weekly Hours, Workday multiplies hourly pay (10) by the *Hourly* Annualization Factor (2080):

  `10 USD * 2080 hours = 20,800.00 USD`

  Workday treats the worker as full-time instead of part time.

Create Compensation Elements

Prerequisites

- Create the earning codes that you want to associate with the base pay compensation elements:
  - Create earnings in Workday Payroll.
  - Maintain external payroll earnings for the Payroll Interface.
- Security: *Set Up: Compensation Elements* domain in the Core Compensation functional area.

Context

Compensation elements link compensation and payroll. When a compensation element is attached to a plan that is assigned to an employee, Workday can determine which earnings to use to pay the employee.

Steps

1. Access the Maintain Compensation Elements task.

   You can also access the Add Compensation Element task to add 1 element at a time for best performance when your compensation elements have a high number of Payroll entities.
2. Consider:

Option	Description
Period Activity Pay Enabled	Displays if the Enable Period Activity check box is selected in the Educational Institutions section of the Edit Tenant Setup - HCM task. Compensation elements enabled for Period Activity Pay aren't available for standard compensation plans.
Academic Pay Enabled	Displays if the Enable Educational Institution Features check box is selected on the Edit Tenant Setup - HCM task. Select the check box if this compensation element can be paid in a different period than the period it was earned in.
Payroll Earning	Select the values that apply to all your payroll entities.
External Payroll Earnings	Select the earnings that apply to each payroll entity.

Next Steps

You can use Maintain Compensation Element Groups task to group compensation elements. If you've more than 1 compensation element that defines base pay, create a compensation element group to associate base pay compensation elements.

Related Information

Tasks

Steps: Create Earnings

Steps: Set Up Compensation Components on page 979

Manage External Payroll Earnings

Map Earnings to Compensation Elements

Setup Considerations: Compensation Eligibility Rules

You can use this topic to help make decisions when planning your configuration and use of compensation eligibility rules. 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

Eligibility rules define dynamic lists that group employees based on their attributes, such as location, management level, position, or job profile. Worker attributes change as they progress through their career and receive promotions, transfer departments, or change locations. You create eligibility rules with attributes and condition rules and logical relations between them.

Example: Sam works in the Portland office and is eligible for an allowance plan based on an eligibility rule that uses the Portland location. Sam then transfers to Amsterdam. The Portland-based eligibility rule no longer applies, but eligibility rules based on the Amsterdam location that do.

Business Benefits

Eligibility rules:

- Save time and increase consistency by automatically populating compensation values in business processes like *Offer*, *Hire*, and in compensation reviews.
- Eliminate time-consuming and error-prone manual maintenance of static employee lists. Static lists are often based on employee attributes, so targeting the attributes is more direct and flexible.
- Make it easier to meet regulatory or business requirements.

Use Cases

- Roll out (assign) or remove compensation plans to employee populations. Example: Roll out the same compensation plan to all nonmanagement employees, except employees in selected departments.
- Assign salary plans based on management level, location, or both.
- Propose compensation during the *Offer*, *Employment Agreement*, and other business processes.
- Assign severance plans based on number of years of service.
- Define the compensation plans or plan profiles that apply to job requisitions.

Questions to Consider

Question	Considerations
Do you configure default compensation on positions?	Workday uses default compensation, if configured on the position, to populate compensation values in business processes such as *Hire*. If you don't configure default compensation on positions, Workday uses eligibility rules. You can assign compensation components (plans, grades, and packages) to eligibility rules on the Assign Compensation Components to Rule task. Doing so enables Workday to populate compensation values during business processes under certain conditions. Example: During the *Hire* process, Workday searches for compensation values from previous employment, *Offer*, the job requisition, and the position. If unsuccessful, Workday derives compensation values from the eligibility rules associated with compensation components.
What criteria do you use to assign compensation plans to employees?	Design your eligibility rules around these criteria. You can then roll out (assign) plans to specified populations.
What employee populations do you target for periodic merit, bonus, and stock awards?	Compensation reviews require that you specify merit, bonus, or stock plans. Workday includes employees assigned to those plans in the compensation review process and doesn't use eligibility rules directly. When configuring compensation eligibility rules, consider your periodic compensation reviews and their target populations.
Do you assign grade profiles manually?	You can create eligibility rules for grade profiles and compensation plan profiles to ensure automatic and accurate updates on positions and employees.
How should Workday assign eligibility rules to compensation plan profiles?	You can access the Edit Tenant Setup - HCM task and in the Compensation section, select the Enable Eligibility Rule Performance Enhancement for Compensation Plan Profiles option. • If selected, Workday stops evaluating compensation plan profiles when it finds the first profile the employee is eligible for. If an employee isn't eligible for any plan profiles, Workday uses the default plan target. Note: Selecting this option is permanent. You can't clear or undo your selection after you submit. • If not selected, Workday evaluates all plan profiles. If an employee is eligible for only 1 plan profile, Workday uses it. If an employee isn't eligible for any plan profiles or is eligible for more than 1, Workday uses the default plan target. Workday recommends that you plan and create eligibility rules to be mutually exclusive and don't target overlapping populations of employees.
How do you want Workday to handle eligibility rules based on Guidelines fields when you change a Guidelines field manually?	You can configure Workday to apply compensation defaulting to compensation plan assignments on the business processes when you both: • Base eligibility rules on Guidelines fields. • Change any field in the Guidelines section that the eligibility rules are based on.

Question	Considerations
	Access the Edit Tenant Setup - HCM task and, in the Compensation section, configure the Enable Defaulting Based on Changes to Guidelines option for relevant business processes. See Reference: Edit Tenant Setup - HCM.

Recommendations

Workday recommends that you design, create, and maintain eligibility rules like a software development project:

Recommendation	Description
Organize and Plan	• Build a team to design, plan, and manage the development, deployment, and use of your eligibility rules. • Develop procedures for creating, testing, approving, and managing eligibility rules. • Document your work. Doing so makes it easier to identify problems if they arise and also helps Workday Support to diagnose issues.
Design	• Develop a list of the employee groups based on your needs. Example: Assess your needs for assigning compensation plans, packages, and components. • Compile the list of attributes that you need for configuring eligibility rules, such as location or management level. • As a best practice, build mutually exclusive eligibility rules that don't overlap each other. Too many eligibility rules might make maintenance difficult and affect performance. • Ensure that your rules are exhaustive so that all employees fall into at least 1 eligibility rule.
Develop	• Create enough eligibility rules to meet your needs, but not so many that managing them is burdensome or performance suffers. When you run eligibility rules for business processes like *Hire*, the more rules, the more processing time. • Use Workday-delivered fields. • Name eligibility rules so that the intended target population is evident. Example: Create an eligibility rule with MBT in the name specifically for use as part of a compensation basis with the Manage Basis Total check box selected. Or, add Amsterdam for a location-based eligibility rule used for employees located there.
Test	• Test each eligibility rule upon initial creation and whenever you change them. • If you discover issues with eligibility rules, record the exact conditions under which they occur. Update your documentation and testing procedures accordingly.
Iterate	When your needs change along with changes to your operations, return to the organization and planning phase to determine how eligibility rules can address your needs. Even the best testing procedures can sometimes miss issues that only occur with a specific configuration. When issues arise during production operations, determine if the issue resulted from design or implementation. Update your testing procedures accordingly.

Requirements

Workday requires compensation eligibility rules for compensation defaulting and to ensure that employees get assigned the appropriate compensation components.

Limitations

No impacts.

Tenant Setup

No impacts.

Security

Set Up: Compensation Rule domain in the Core Compensation functional area.

Business Processes

No impacts.

Reporting

Access the Compensation Eligibility Rules report to list the conditions, compensation components, and job profiles for selected eligibility rules.

Integrations

No impacts.

Connections and Touchpoints

Compensation eligibility rules interact with Workday Recruiting.

Features	Considerations
Positions and job requisitions.	If you've configured default compensation on positions, Workday populates compensation values from the position. Otherwise, Workday uses eligibility rules. Design eligibility rules to fill in for positions or job requisitions where there's no default compensation.
Workday Recruiting.	Workday derives compensation values on the *Offer* or *Employment Agreement* from the job requisition. However, if Workday can't find compensation values, it uses eligibility rules.

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

Create Eligibility Rules for Compensation on page 986

Roll Out Compensation Plans to Employees on page 1027

Steps: Propose Compensation for Employees or Positions on page 1032

Steps: Set Up Locality Pay Areas on page 1123

Reference

FAQ: Compensation Defaulting on page 1039
FAQ: How is Total Eligible Earnings calculated? on page 1199
Reference: Edit Tenant Setup - HCM

Create Eligibility Rules for Compensation

Prerequisites

- Set up objects, such as job profiles or locations that form the basis for eligibility rules.
-
- Security: *Set Up: Compensation Rule* domain in the Core Compensation functional area.

Context

You can configure eligibility rules that determine eligibility for compensation components, including compensation plans, grades and grade profiles, and packages. Workday can then use eligibility rules to automatically populate values in some processes. Examples:

- When proposing compensation during the *Offer* or *Employment Agreement* business processes.
- When creating a job requisition.
- When you assign, roll out, or remove a new or updated compensation plan to employees defined by an eligibility rule.
- When creating a referral one-time payment.

Steps

1. Access the Create Compensation Eligibility Rule task.
2. (Optional) Select rules, one at a time, from the Copy Condition from Rule list.

   You can use the related actions menu to view details about the conditions.

   Workday creates a row in the Rule Conditions grid for each rule that you select and populates the Source External Field or Condition Rule column.
3. For each rule condition, consider:

Option	Description
And/Or	If 2 or more rule conditions exist, select *And* or *Or* to control how each relates to the preceding line. Workday evaluates the expression to be true when: • All conditions in an expression connected by *And* are true. • At least 1 of the conditions in an expression connected by *Or* is true.
( )	Use the parentheses columns when you need 3 or more rows connected by *And* and *Or*. Example: To state (a and b) or c add: • An opening parenthesis at the beginning of statement a. • An *And* at the beginning of statement b. • A closing parenthesis at the end of statement b. • An *Or* at the beginning of statement c.
Source External Field or Condition Rule	Select 1 option from delivered Workday sources or from condition rules that you've defined.

Option	Description
	The type of field or condition rule you select determines other available options.
Relational Operator	Options depend on the data type: • A `contains` operator applies to text but not numeric data types. • A `less than` operator applies to numbers or currency, but not text.
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 a value to compare to the source.
Order	Use arrows to control the order in which Workday processes the statements.

Result

When you assign compensation components to employees, the eligibility rules determine which ones are available for selection in the By Compensation Rule prompt folder.

Example

You require that an employee is eligible when both rule conditions a and b are true, or if rule condition c is true. In short, if (a and b) or c are true.

Assume also that:

- a means that Location equals Paris.
- b means that Job Exempt is true.
- c means that Job Family is Executive.

The employee is eligible or not eligible under these conditions:

- Eligible if Location is Paris and Job is Exempt.
- Not eligible if Location is Paris but Job is non-Exempt.
- Not eligible if Location is Pleasanton and Job is Exempt.
- Eligible if Job Family is Executive.
- Not eligible if Job Family is Individual Contributor.

Next Steps

- Access the Assign Compensation Components to Rule task to assign eligibility rules to compensation components.
- Run the Compensation Eligibility Rules report to verify details.

Related Information

Tasks

Steps: Propose Compensation for Employees or Positions on page 1032

Create Business Process Condition Rules

Reference

FAQ: Compensation Defaulting on page 1039

2023R1 What's New Post: Eligibility Rule Plan Profile Processing

Assign Compensation Components to an Eligibility Rule

Prerequisites

- Define the compensation components to assign to the eligibility rule.
- Security: *Set Up: Compensation Rule* domain in the Core Compensation functional area.

Context

You can assign compensation components to a compensation eligibility rule. Doing so enables Workday to automatically populate default compensation values during business processes under certain conditions.

Example: During the *Offer* and *Employment Agreement* business processes, Workday attempts to derive compensation values from the job requisition. If there is no job requisition, Workday derives values from the eligibility rules associated with compensation components.

Note: You can also assign eligibility rules to a compensation component when you create or edit the component.

Steps

1. Access the Assign Compensation Components to Rule task.
2. Select the Compensation Packages, Compensation Grades, Compensation Grade Profiles, and Compensation Plans that you want to associate with the rule.

   Workday displays those components already assigned to the rule.

Grades and Grade Steps

Steps: Set Up Compensation Grades and Grade Steps

Prerequisites

Set up compensation elements and eligibility rules.

Context

Configure and manage compensation guidelines:

- Grades, pay ranges, and grade profiles.
- Grade steps and adjustments to them.
- Grade step progression schedules.

Steps

1. Create Compensation Grades on page 989.

   Create compensation ranges for jobs and job profiles.
2. Create Compensation Grade Steps on page 991.

   Create the grade steps that assign specific monetary amounts to workers. Configure the length of time that workers must remain in a step before progressing.
3. Set Up Adjustments to Compensation Steps on page 993.

   Make adjustments to compensation steps associated with a compensation grade. Workday automatically adjusts the amount for all employees with those steps.
4. Create a Compensation Grade Hierarchy on page 994.

   Create a superior-subordinate relationship between grades.

5. Set Up Automatic Compensation Grade Step Progression Schedules on page 995.

   Configure automatic compensation grade step progression schedules to ensure that regulatory or workplace policies for step progression occur on time.
6. Request Grade Change on page 997.

   Request a change in grade for an employee.
7. Set Up Adjustments to Compensation Grades Assigned to Job Profiles on page 997.

   Update the grade assigned to a job profile or to employees in that job profile.

Related Information

Reference

Reference: Compensation Grade and Pay Range Security on page 1002

Reference: Compensation Step and Grade Progression Reports on page 1003

Create Compensation Grades

Prerequisites

- Set up compensation elements and eligibility rules.
- Create eligibility rules for compensation.
- Create frequencies.
- Security: *Set Up: Compensation Packages* domain in the Core Compensation functional area.

Context

Grades are guidelines used in determining compensation for a worker. Grades also define the standard compensation range for a given job or job level. You can associate more than 1 compensation basis and pay range to a grade.

Steps

1. Access the Create Compensation Grade task.
2. Consider:

Option	Description
Pay Range Segments	Enter 3, 4, or 5 to define the number of segments you want the pay range broken into. Example: If the pay range is 45,000 - 100,000 USD and you select 3, then the 3 Workday calculated segments are: • 45,000 - 63,333 USD • 63,333 - 81,666 USD • 81,666 - 100,000 USD Maximum Pay - Minimum Pay = $100,000 - $45,00 = $55,000. Total Range Spread / Number of Segments = $55,000 / 3 = $18,333.
Use Grade Profiles	Select this check box if you want to use eligibility rules to create more granular compensation ranges within the grade. Example: • Default range = 45,000 USD - 100,000 USD

Option	Description
	• New York range = 55,000 USD to 120,000 USD

If you selected both of these check boxes:

- Apply FTE% on the salary plan.
- Use 100% FTE for Pay Range Comparisons in the Compensation section on the Edit Tenant Setup - HCM task.

Workday divides the employee salary by the FTE % before comparing it to the salary range midpoint when calculating these fields:

- Compa-Ratio
    - Compa-Ratio = 100% FTE Basis Amount / Mid-point
- Position in Range
- Pay Range Segment

3. In the Default section, consider:

Option	Description
Base Pay Elements	Select the compensation elements you want to associate with this grade. Workday only includes hourly, salary, and allowance plans categorized as base pay to calculate compa-ratio and target penetration.
Eligibility Rules	Select 1 or more rules to use to determine who is eligible for this compensation component or plan. When you assign compensation to employees, the eligibility rules determine whether this component is available for selection in the By Compensation Rule prompt folder. If you select multiple eligibility rules, Workday evaluates each rule independently to determine employee eligibility for the compensation component. Employees are eligible if they meet the qualifications of any 1 rule. You can only use individual rules once in the grade and grade profiles.

4. In the Compensation Pay Range tab, enter default compensation pay ranges. Consider:

Option	Description
Calculate Segments	Select this check box if you want Workday to calculate the values for the segment tops in equal amounts and the midpoint. When selected, only the Minimum and last segment top fields are available for entry. Once you enter these fields, Workday automatically calculates the other segment tops and midpoint.
Segment # Tops	This is the top value for the segment. The last segment top is the maximum value for the range.
Midpoint	You can enter the midpoint when the Calculate Segments check box is cleared. Workday uses the *Use Calculated 50%* option to calculate compa ratio instead of the value you enter here when you: • Change the midpoint to be anything other than 50% of the range, and

Option	Description
	• Have the *Use Calculated 50%* option selected for Compa-Ratio Midpoint field on Edit Tenant Setup - HCM.

5. (Optional) If you selected the Use Grade Profiles check box, enter your grade profiles in the Compensation Grade Profiles tab.

   A grade profile must have a pay range associated with Total Base Pay. You can't change the number of pay range segments for profiles, the number is the same as the grade defaults.

   You can drill down to details on any job profiles that reference this grade.

   Grade profiles don't display if their number exceeds 250.

Result

Workday uses grades to calculate compa-ratio and pay range segments.

If proposed compensation for an employee extends beyond the limits of the reference pay range for the employee's grade or grade profile, Workday issues a warning but permits submission of the proposed compensation. Reviewers and approvers can then evaluate whether to approve the proposal.

Next Steps

To associate a grade to a job profile, use the Create or Edit Job Profile tasks.

Create Compensation Grade Steps

Prerequisites

- Create compensation grades.
- Security: *Set Up: Compensation Steps* domain in the Core Compensation functional area.

Context

A step is a specific point in a compensation grade or grade profile salary range associated with an interval, period, and optionally a step progression rule. Steps, like compensation plans, assign a specific monetary amount to a worker.

If you assign a grade profile to a worker's compensation package, Workday uses the steps on the grade profile, not the steps on the grade.

Steps

1. Access the Maintain Compensation Steps task.
2. Select the Assign 1st Step During Compensation Proposal check box to assign the first compensation step to workers associated with their grade or grade profile when hired.

   If selected, Workday assigns the first compensation step when all these conditions are true:

   - The worker has an eligible compensation grade.
   - The grade has compensation steps.
   - The worker either doesn't have a step assigned or doesn't have a step in the grade assigned.
3. In the Grade Profile Steps tab, consider:

Option	Description
Salary Pay Plan	Select the salary or hourly plan you want to associate with these steps.

Option	Description
Allow Override	Select this check box to allow the overriding of the step values in a specific worker's compensation package.

4. In the Steps section of the Grade Profile Steps tab, consider:

Option	Description
Inactive	Select to mark this step as inactive. Inactive steps are skipped in automatic step progression, and can't be selected during compensation events. You can have duplicate inactive steps; however, only 1 step that shares a Name or Sequence value with another step can be active at a time. When you reactivate a previously inactive grade or grade profile, all associated steps with a unique Name and Sequence will reactivate. Duplicate steps will remain inactive. Example: when performing an annual update, some of your compensation steps must be retired. Rather than rebuilding a new grade profile to exclude the retired steps, you simply mark the step as Inactive.
Sequence	Identifies the step progression order for workers assigned to the grade or grade profile. Enter any unique and sortable character string, such as 1-2-3 or A-B-C. Workday sorts the sequence by character. So if you use numbers, use 01 for 1, 02 for 2, and so on. Otherwise, 11 precedes 2 and 21 precedes 3.
Interval and Period	Define the length of time that workers must remain in the step before progressing to the next step in the grade. The interval must be a positive whole number, such as *6 Months* or *2 Years* or *13 Weeks* or *30 Days*.
(Optional) Progression Rule	Select an eligibility rule for Workday to use to progress workers. The rule on the current step must be true for workers to progress to the next step. Examples: Age, length of service, job profile, or collective agreement.
Grace Period Interval and Grace Period Type	The number of hours or workweeks a worker can accumulate applicable time off or leave before Workday adjusts their Next Step Progression Target Date.

Option	Description
	See Set Up Time Off and Leave Impact on Step Progression.

5. (Optional) In the Grade Profile Steps tab, you can define a step on a profile.

   If there are no profiles associated with the selected salary pay plan, then you can't add grade profile steps.

   When a worker matches the eligibility rules on the grade profile, Workday uses the values associated with the grade profile steps, not those on the Grade Steps tab.

Result

To view the compensation step assigned to the worker, select Compensation > View Compensation as a related action off the worker.

Next Steps

Assign steps to employees as part of staffing transactions based on your compensation package and compensation defaulting rules.

Related Information

Tasks

Set Up Automatic Compensation Grade Step Progression Schedules on page 995

Reference

Reference: Edit Tenant Setup - HCM

Set Up Adjustments to Compensation Steps

Prerequisites

- Configure the *Set Up Compensation Step Adjustment* business process to meet your organization's needs.
- Create compensation steps.
- Define reasons for the *Request Compensation Change* event using the Maintain Event Categories and Reasons task.

Context

You can make adjustments to compensation steps associated with a compensation grade. Workday automatically adjusts the amount for all employees with those steps.

Steps

1. Access the Set Up Compensation Step Adjustment task.
2. Select the compensation grade.

   If the grade you want to adjust already has an adjustment in progress, the grade won't be available for selection.
3. Select the allowed actions for Employees using Default and Employees using Override.

Option	Description
Adjust to New Defaults	Applicable to Employees using Default and Employees using Override. Workday sets the assigned value to the new default.

Option	Description
Adjust by Same Amounts	Applicable to Employees using Override. Workday calculates the difference between the old default and the new default. Workday adjusts the employee's assigned value by that same difference. For example, the old default was 500 and the new default is 600, which equals a difference of 100. The employee's override amount was 700. The adjustment to the employee's assigned value would be 700 + 100 = 800.

4. In the Grade Steps tab, enter the New Amount for the step that replaces the Old Amount.
5. In the Grade Profile Steps tab, enter the New Amount for the step that replaces the Old Amount.

Result
If you included a review step in the business process definitions, the reviewer completes the same steps and either approves, denies, or sends back the request to the proposer.

Once approved, the process:

- Updates the compensation grade steps with the new defaults so that future grade assignments have the new values.
- Creates compensation events with new values for each impacted employee.

Next Steps

To correct a future dated compensation event, correct or rescind the event and then reprocess it after you run the adjustment process.

Related Information
Tasks
Create Compensation Grade Steps on page 991
Set Up Automatic Compensation Grade Step Progression Schedules on page 995

Create a Compensation Grade Hierarchy

Prerequisites

- Create compensation grades.
- Security: *Set Up: Compensation General* domain in the Core Compensation functional area.

Context

You can create a single superior-subordinate relationship between grades. Example:

Level 1	CEO	CFO	CIO
Level 2	VP Finance	VP Human Resources	VP Sales
Level 3	Manager Engineering	Manager Recruiting	Manager Research
Level 4	Receptionist	Support Analyst	Salesperson

Note: You can also use the *Put Compensation Grade Hierarchy* web service to create or edit your grade hierarchy.

Steps

1. Access the Maintain Compensation Grade Hierarchy task.
2. Create your grade structure.

Option	Description
Order	This is the grade level. 1 is the highest level.
Compensation Grades	Enter all grades you want associated with the grade level.

Related Information

Tasks

Set Up Compensation Package Analytics on page 1045
Steps: View Talent Across Organizations on page 1813
Create Compensation Grade Steps on page 991

Set Up Automatic Compensation Grade Step Progression Schedules

Prerequisites

- Create compensation steps and their progression sequence for your grades and grade profiles.
- Security: *Process: Automatic Step Progression* domain in the Core Compensation functional area.

Context

Administrators can configure automatic compensation grade step progression schedules to ensure that regulatory or workplace policies for step progression occur on time. As a best practice, Workday recommends that you schedule the Employee Compensation Step Progression and Employees Eligible for Next Compensation Step reports to run at the same time as the step progression process. Doing so identifies the employees participating in parallel compensation events that can prevent them from progressing to the next step.

Steps

1. Access the Schedule Automatic Step Progression task.
2. Select a Run Frequency to determine when and how frequently to automatically progress your employees to the next step.
3. On the Schedule tab, enter the applicable scheduling options, which vary depending on the selected Run Frequency.

   This tab doesn't apply to the *Run Now* option.

Option	Description
Daily Recurrence	How frequently the process runs in the Recurs Every x Day(s) field. The number you enter must range from 1 through 366. Example: To schedule a recurrence for every day, enter 1; for every other day, enter 2. You can select Recurs Every Weekday to run the process every day from Monday through Friday.
Weekly Recurrence	How frequently the process runs in the Recurs Every x Week(s) field. The number you enter must range from 1 through 52.

Option	Description
Monthly Recurrence	How frequently the process runs in the Day of the Month, or Week of the Month and Day of the Week fields.
Start Time	The time of day to start the background process.
End Date	You can't schedule a process to run more than 5 times after the end of the next calendar year. Example: a process that runs daily starting on 4/22/2013 must end no later than 1/5/2014. As a best practice, set the end date no later than 12/31 of the next calendar year.

4. (Optional) Select 1 or more employees to include or exclude from the step progression schedule using either an eligibility rule or by selecting employees individually.

Result

The process scans all employees with compensation steps and evaluates whether the interval/period or the step progression rule on the current step applies. If so, Workday progresses these employees to the next grade step. Upon completion, the process updates compensation history for these employees.

- If you assigned a progression rule to the step, the effective date of the compensation change is the date of the scheduled run. If you associated the step with an interval/period, the effective date of the compensation change is the date employees meet the time requirement.
- If employees are participating in a parallel compensation event, Workday doesn't progress them to the next step. You can view a list of these employees by running these reports:
  - Employee Compensation Step Progression
  - Employees Eligible for Next Compensation Step

  The next time you run the process, it includes those employees. The date of the step change is the start date of the new step no matter when the process advances the employee.

Example: An employee is eligible to progress from Step 1 to Step 2 on July 1 but is part of another compensation process on July 1. The automatic step process ignores that employee and logs them on the Employee Compensation Step Progression Audit report. Each run, the process attempts to progress that employee to the next step until successful. The date of step change remains July 1, no matter when the process finally succeeds.

For employees managed by a compensation basis total, Workday processes salary plans in different ways, depending on whether the plan allows overrides:

- If the salary plan doesn't allow overrides, Workday treats the salary increase associated with step change as a fixed amount and doesn't alter it.
- If the salary plan does allow overrides, Workday allocates the plan as necessary.

In both cases, Workday performs a partial calculation for any plans that depend on the salary plan. Workday then adjusts the Primary Compensation Basis.

Related Information
Tasks

Create Compensation Grade Steps on page 991

Reference

Reference: Compensation Step and Grade Progression Reports on page 1003

Request Grade Change

Prerequisites

- Define reasons for the *Request Compensation Changes* event using the Maintain Event Categories and Reasons task.
- Create compensation grades.
- Configure the *Request Compensation Change* business process to meet your needs.

Context

You can request a change in grade for any employee not assigned a grade step.

Steps

1. Access the Request Grade Change task.
2. Specify the Employee to whom this change applies. This field doesn't display when you select this task as a related action off an employee.
3. Select a different Grade, and optionally, select a new Grade Profile.

Result

Changing the grade might change the pay range for the employee; however, it doesn't change actual compensation.

Next Steps

To change pay, use the Request Compensation Change task.

Related Information
Tasks
Set Up Compensation Package Analytics on page 1045

Set Up Adjustments to Compensation Grades Assigned to Job Profiles

Prerequisites

- Configure the *Set Up Compensation Grade Job Profile Adjustment* business process.
- Define reasons for *Request Compensation Change* event using the Maintain Event Categories and Reasons task.

Context

You can update the grade assigned to:

- A job profile.
- Employees in that job profile.

Note: Workday doesn't update employees in a grade step.

Steps

1. Access the Set Up Compensation Grade Job Profile Adjustment task.

2. Select the Job Profile.

   If the job profile you want to adjust already has an adjustment in progress, it won't be available for selection.

   Workday calculates and displays:

Employees in this Grade	• Identifies all positions that have the selected job profile. • Identifies employees in those positions. • Identifies employees that have the same grade as that on the job profile. • Excludes employees in a compensation step.
Employees not in this Grade	• Identifies all positions that have the selected job profile. • Identifies employees in those positions. • Identifies employees that have a grade that doesn't match the one on the job profile.
Employees with an In Progress Event	Workday doesn't process these employees. Complete the in-progress event and then reprocess these employees.

3. Select the Allowed Actions for Employees not in this Grade.

   This applies only when you assign employees to the plan.

Option	Description
Adjust to New Grade	Workday sets the assigned value to the new default.
Do Not Adjust	Workday makes no changes to the values assigned to the employee's compensation.

4. In the Proposed Grade section, enter the Grade you want to associate with the job profile.

Result

Once approved, the process:

- Updates the job profile with the new grade.
- Assigns the grade to the employees and uses eligibility rules to determine if an employee qualifies for a grade profile.
- Creates compensation events using the entered Event Name for each impacted employee.

Example

An employee living in Atlanta has a job profile called Individual Contributor. The grade associated with the job profile is called Level 1. Level 1 has 3 grade profiles: Boston, Chicago, and Detroit. The employee doesn't qualify for any of the grade profiles.

Change the grade associated with the job profile to the grade called IC Level 1. IC Level 1 has 2 grade profiles: Atlanta and San Francisco.

When you run the process, the employee receives the same job profile with the new grade called IC Level 1. However, the eligibility rules associated with the grade qualifies the employee for the grade profile called Atlanta.

Related Information

Tasks

Create Compensation Grades on page 989

Create a Compensation Grade Hierarchy on page 994

Set Up Step Progression Configuration and Notifications

Prerequisites

Set up compensation grades. See Create Compensation Grades.

Set up compensation grade steps. See Create Compensation Grade Steps.

Set up automatic step progression schedules. See Set Up Automatic Compensation Grade Step Progression Schedules.

Security: *Process: Within Grade Increase* domain in the core compensation functional area to access the Edit Step Progression Configuration task.

Security: *Worker Data: Step Progression Target* domain in the core compensation functional area to view an employee's Next Step Progression Target date in the View Compensation task.

Configure the default definition and business process security policy for the *Within Grade Increase Notification* business process.

Context

Workday enables you to configure automatic step progression so that a worker's next step progression target date is preserved if they receive a pay increase or face other compensation changes tied to an effective date.

Workday also enables you to remain informed of upcoming step progressions with the option to schedule step progression notifications that notify your managers of their worker's upcoming step progression events, whether they're eligible or ineligible for progression. If an employee doesn't meet all of the criteria for their automatic step progression, managers can approve or deny the step progression in this notification.

Steps

1. Access the Maintain Event Categories and Reasons task.
    a. Select the *Request Compensation Change* event.
    b. Create a Reason Category named *Last Equivalent Increase*, or whatever your organization chooses.
    c. Create a Reason to denote that a compensation event won't affect the employee's step progression schedule. Example: *Voluntary Demotion*.
2. Access the Edit Step Progression Configuration task.

    As you complete the *Within Grade Increase* section, consider:

Option	Description
Step Progression Notification Time Frame (in days)	Enter the amount of calendar days you want Workday to check ahead for scheduled step progressions to notify you of. Example: You want to be notified of step progressions scheduled to occur 60 days in the future.

Option	Description
Performance Rating Threshold	Select the minimum performance rating an employee must achieve to be eligible for automatic step progression.
Quality Step Increase Reason Code	See Set Up Quality Step Increase.
Step Progression Effective Date	Select the date when the automatic step progression will take place. Example: An employee is eligible for step progression on a Thursday, and pay periods begin on Mondays. You select the *Start of Next Pay Period* option to automatically progress the employee to the next step on the following Monday, the start of the next pay period.

3. Select the Enable Last Equivalent Increase for Step Progression Date Adjustment check box under the *Last Equivalent Increase* tab.

   Add the reasons you configured to the Non-Qualifying Event Reasons field.
4. Access the Schedule Within Grade Increase Notification task.

   This task determines when and how often managers receive notifications of upcoming worker step progressions.

Result

Users configured in the security policy of the *Within Grade Increase Notification* business process will receive 2 types of step progression notifications in My Tasks based on your schedule and business process configuration: 1 for workers who meet the performance threshold and time spent in their current step, and 1 for workers who do not meet these criteria. Users can grant or withhold the step progression of a worker who does not meet the criteria.

When an administrator accesses the Request Compensation Change task, they can now select a *Last Equivalent Increase* reason to preserve the employee's automatic step progression schedule after they submit the compensation change.

Example

To remain up to date on all upcoming scheduled step progressions, you configure the notification schedule to notify you on the first of every month of employee step progressions scheduled to occur within the next 30 days. You've configured the business process to notify you of both eligible and ineligible employees. Employees who receive a performance rating below 3 do not automatically progress to their next step, and you can grant or withhold their progression.

Next Steps

Run the All Within Grade Increase Notification Events report to view a complete list of notification events.

Reinstate the automatic step progression of employees whose automatic step progression you withheld.

You can create step progression override events for workers and change their Workday-calculated Next Step Progression Target Date to a date of your choosing. Automatic step progression will run based on this new overridden date. To do this:

1. Configure the business process security policy and default definition for the *Request Step Progression Date Override* business process.
2. Access the Request Step Progression Date Override task.

Related Information

Reference

2023R1 What's New Post: Within Grade Increase

Set Up Time Off and Leave Impact on Step Progression

Prerequisites

Set up compensation grades. SeeCreate Compensation Grades.

Set up compensation grade steps. See Create Compensation Grade Steps.

Set up automatic step progression schedules. SeeSet Up Automatic Compensation Grade Step Progression Schedules.

Security:

- *Set Up: Leave of Absence* in the Absence functional area.
- *Set Up: Time Off* in the Absence functional area.
- *Process: Within Grade Increase* in the Core Compensation functional area.
- *Worker Data: Step Progression Target* in the Core Compensation functional area.

Context

You can enable a worker's time off or leave to impact their next step progression target date. Based on the step's eligibility rules, grace period, and time off or leave impacts, Workday calculates an adjusted Next Step Progression Target Date on the worker's profile.

Steps

1. Access the Edit Step Progression Configuration task.

   Select the Enable Time Off and Leave Event Adjustments check box in the Time Offs and Leave Types tab.
2. Access the Maintain Absence Type Code Mapping task.

   Map the time off and leave events that you want to impact step progression to the impact code Step Progression. You can only map time offs and leave types configured in hours to step progression.
3. (Optional) Access the Maintain Compensation Steps task and configure the Grace Period Interval and Grace Period Type of time off and leave events for each step.

   Grace periods enable you to indicate the number of hours or workweeks a worker can accumulate applicable time off or leave before Workday adjusts their Next Step Progression Target Date. You can't assign a different grace period by leave type, time off, or location. The grace period is configured at the step level and all configured time offs and leaves impact the step progression equally.

Result

Workday takes the total amount of approved leave and time off hours taken by the worker and tied to the step progression impact code, and adjusts the Next Step Progression Target Date to a later date. This evaluation occurs continuously as time off and leave hours are approved.

Example

A worker on compensation step 5 has a next step progression target date of June 1. He takes 2 months off work with a leave type tied to the Step Progression impact code. His current step has a grace period of 1 month. Workday adjusts his next step progression target date to July 1.

Next Steps

Related Information
Tasks
2024R1 What's New Post: Time Off and Leave Impact on Step Progression

Set Up Quality Step Increase

Prerequisites

Set up compensation grades. See Create Compensation Grades.

Set up compensation grade steps. See Create Compensation Grade Steps.

Set up automatic compensation grade step progression schedules. See Set Up Automatic Grade Step Progression Schedules.

Configure the default definition and business process security policy for the *Quality Step Increase* business process.

Security: *Process: Within Grade Increase* in the Core Compensation functional area.

Context

Quality step increases in Workday grant employees a one-time step increase that doesn't impact their normal step progression schedule.

Steps

1. Access the Maintain Event Categories and Reasons task.
    a. Select the *Request Compensation Change* event.
    b. Create a Reason Category named *Quality Step Increase*, or whatever your organization prefers.
    c. Create a Reason to denote why a worker will receive a quality step increase. Examples: *Temporary Promotion*, or *Outstanding Rating*.
2. Access the Edit Step Progression Configuration task.

    Add your reason to Quality Step Increase Reason Code field. This will be the default reason listed in the quality step increase request.
3. Access the Request Quality Step Increase task.

Result

Workday sends the user configured to review the quality step increase a My Tasks notification with the options to approve, deny, cancel, or add additional reviewers to the request.

The worker receiving the quality step increase retains their normal step progression schedule.

Related Information
Reference
2023R1 What's New Post: Quality Step Increase

Reference: Compensation Grade and Pay Range Security

You can configure security domains in the Core Compensation functional area:

- For default compensation on open positions and job requisitions.
- To access worker compensation data.
- For workers to access their own compensation data.

Default Compensation on Open Positions and Job Requisitions

Configure security domains for default compensation on open positions and job requisitions.

Non-Worker Data: Compensation	Parent domain of the non-worker compensation data subdomains.
Non-Worker Data: Compensation Basis Pay Range	Grants access to the pay range, compa-ratio, penetration, and segment-related fields.
Non-Worker Data: Compensation Grade	Grants access to the compensation grade and grade profile-related fields.
Non-Worker Data: Compensation Pay Range	Grants access to the total base pay range, compa-ratio, benchmark, and segment-related fields.

Worker Compensation Data

Configure security domains to access worker's compensation data.

Worker Data: Compensation by Organization	Grants access to the Compensation tab on the worker profile, which displays reports and report fields for the worker's compensation assignment.
Worker Data: Compensation Basis	Grants access to worker's Compensation Basis.
Worker Data: Compensation Basis Pay Range	Grants access to the pay range, compa-ratio, penetration, and segment-related fields of compensation bases.
Worker Data: Compensation Grade	Grants access to compensation grade and grade profile-related fields.
Worker Data: Compensation Pay Range	Grants access to the total base pay range, compa-ratio, benchmark, and segment-related fields.

Worker Access to Their Compensation Data

Configure security domains for workers to access their own compensation data.

Note: Workday doesn't deliver these self-service security policies enabled. Enable the security policies and add security groups to allow employees to see their own pay ranges.

Self-Service: Compensation Basis Pay Range	Grants workers access to the pay range of their Primary Compensation Basis.
Self-Service: Compensation Salary Grade	Grants workers access to compensation information related to their salary grade and grade profile
Self-Service: Total Base Pay Range	Grants workers access to the pay range of their total base pay.

Related Information
Tasks
Edit Domain Security Policies
Create Compensation Grade Steps on page 991
Set Up Automatic Compensation Grade Step Progression Schedules on page 995

Reference: Compensation Step and Grade Progression Reports

To view employee information regarding step and grade progression, use these reports:

Report Name	Purpose	Generation	Next Step
Employee Compensation Step Progression	Lists employees who have had a compensation step change within the specified time period. The report captures: • Employees advanced to the next step through the automatic step progression progress. • Employees hired into a compensation step. • Employees with a manual compensation step change. Click the various links on a compensation change to drill into details. For hire compensation events, the Old Step value remains blank if this is their first step.	To run this report: • Access the report through search or the Compensation menu category. • Use the Schedule a Report task to schedule and run the report the same time that you run automatic step progression process.	Review the employees included on the list and drill into details as necessary. If you have run the automatic step progression process, access the Employee Compensation Step Progression Audit report to review a list of skipped employees due to conflicting compensation events.
Employee Compensation Step Progression Audit	This report lists employees eligible to progress to the next compensation step in their grade but did not. Some employees don't progress due to a parallel compensation process that ran the same time as the automatic step progression process. The automatic step progression process can advance employees to the next step if there is no parallel compensation process in progress.	To run this report: • Access the report through search or the Compensation menu category. • Use the Schedule a Report task to schedule and run the report the same time that you run automatic step progression process.	Complete the processing of the conflicting compensation event for the pending employees. To drill to the compensation event that prevented the step progression, click the Parallel Compensation Process link. Next, rerun the automatic step progression process using the Schedule Automatic Step Progression task.
Employees Eligible for Next Compensation Grade	Lists relevant details about employees who have reached the last compensation step in their current grade and are eligible to progress into the first step of the next grade.	To run the report: • Access the report through search or the Compensation menu category. Use the current or future date.	For employees on the last step of their grade, progress these employees to the next grade manually using the Request Compensation Change task.

Report Name	Purpose	Generation	Next Step
		• Use the Schedule a Report task to schedule and run the report the same time that you run automatic step progression process.	The automatic step progression process only moves employees to the next step within the same grade.
Employees Eligible for Next Compensation Step	This report lists, as of a specific date, relevant details about employees who have satisfied the time requirement for their current compensation step and are eligible to progress to the next step in their grade.	Access the report through search or the Compensation menu category. Use the current or future date.	When ready, run the automatic step progression process to advance these employees to the next step in their grade. To schedule and run the process, use the Schedule Automatic Step Progression task.

Compensation Survey Management and Benchmark

Setup Considerations: Compensation Survey Management and Compensation Benchmark

You can use this topic to help make decisions when planning your configuration and use of compensation survey management and compensation benchmark. 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

Compensation survey management and compensation benchmark enable you to compare how you're compensating your employees to other employers and to employees in your tenant. You can match market data from compensation survey vendors, and internally to Workday job profiles to compensate your employees and candidates accordingly.

Business Benefits

With compensation survey management, you can:

- Understand how your organization's compensation compares to the market.
- Monitor compensation trends in your industry.
- Budget for compensation cycles in a competitive job market.
- Identify employees that fall below market.
- Offer candidates more competitive compensation packages.
- Make informed decisions on retaining key employees.

Use Cases

- Maintain multiple vendors, products, and compensation surveys over time.
- Match survey jobs with Workday job profiles.
- Connect your employees with matched survey jobs.
- Populate job matches in new compensation surveys based on matches in past surveys.
- Use Workday reports to collect employee compensation data for survey submission.
- Store survey results from multiple surveys with multiple compensation components.
- Store custom fields and percentiles for each compensation component.
- Manage multiple result sets and their effective dates for each survey.
- Manage survey scopes, and use compensation eligibility rules to connect employees with survey scopes.
- Use data from multiple surveys to generate a compensation benchmark that you can use for guidance during compensation transactions or to analyze employee compensation.
- Use machine learning to analyze jobs and job profiles from compensation surveys to recommend job matches.

Questions to Consider

Questions	Considerations
Will Workday calculate the external compensation survey benchmark, or will you calculate it outside of Workday and load it?	If Workday calculates the compensation benchmark, set up survey vendors, job matches, load survey results, and configure a calculated compensation benchmark cycle. If you calculate the benchmark outside of Workday, you only need to set up survey result compensation components and result percentiles. Then load your benchmark data into a loaded compensation benchmark cycle.
What survey vendors and products are best suited for this feature?	You can use this feature to manage quantitative compensation surveys.
How often should you update survey vendors, products, and surveys?	You only need to set up a vendor and survey product once. You can then add new surveys each year.
How many compensation survey components do you need?	You can configure as many survey components, such as Base Pay or Total Cash, as necessary with the Maintain Compensation Survey Components task. You can then load components into Workday using the *Import Compensation Survey Job Results* web service.
How do you set up compensation survey result custom fields?	Access the Maintain Compensation Survey Result Custom Fields task. You can configure each custom field as numeric or to inherit the currency type from compensation component. You can then load your custom fields into Workday using the *Import Compensation Survey Job Results* EIB template and web service.
How do you set up compensation survey result percentiles?	Use the Maintain Compensation Survey Result Percentiles task to configure percentiles. You can configure as many percentiles, such as 25th, 50th, and 75th, as necessary. You can then load them into Workday using the *Import Compensation Survey Job Results* web service.

Questions	Considerations
What survey scopes do you need?	Configure scopes that belong to each compensation survey vendor on the Maintain Compensation Survey Scopes task. Survey scopes can be locations, such as *Tri-Cities Area* or *San Francisco Bay Area*. You can associate survey scopes with employees using eligibility rules.
How do you want to manage multiple survey result set releases of the same survey?	You can configure result set names and effective dates on the Maintain Compensation Survey Result Sets task.
How do you match a job profile to a survey job or a specialty of a survey job?	You can match job profiles to survey jobs or job specialties on the Edit Compensation Survey Job Matches task. You can also use the *Put Compensation Survey Job Matches* web service. To match a subset of employees of a job profile to a survey job or a specialty, you can also set up eligibility rules on that job match. Workday matches employees for the job profile that meet: • 1 of the eligibility rules on the compensation survey, and 1 on the survey job to the job profile match. • 1 of the eligibility rules on the compensation survey, and 1 on the survey job specialty to the job profile match.
How do you use a compensation survey so that it applies only to a certain country?	Access the Maintain Compensation Surveys task to set up an eligibility rule specifying that country on the survey. Workday matches only the employees in that country to jobs in the survey.
Do you have a compensation survey that applies to multiple countries but the job matches differ across countries?	You can set up eligibility rules: • To manage surveys for each country separately. However, you must create a separate survey for each country and load survey job catalogs and job matches for each survey. • On the job match, not the compensation survey. You can then set up 1 survey and load the survey job catalog once. For the survey jobs that have different matches by country, you can set up multiple matches and attach country-specific eligibility rules to each match.
How do you manage a compensation survey that covers multiple countries or multiple locations with different survey results?	You can set it up as 1 survey, then load the job catalog and job matches. For each country or each location, set up a result scope using the Maintain Compensation Survey Scopes task, and attach eligibility rules to each scope.
Do all job profiles or a subset require weights, adjustments, or annual aging factors?	You can configure weight, adjustment, and aging factors for all job profiles or a subset on the Create Compensation Benchmark Cycle task.

Questions	Considerations
	You can then apply them to all job profiles or to a subset.
What weight, adjustment or aging factors do you apply to your survey results?	You can configure weight, adjustment, and aging factors on the Create Compensation Benchmark Cycle task.

Recommendations

Workday recommends that you:

- Set up eligibility rules to determine which employees qualify for compensation surveys, job matches, or scopes. If you don't set up eligibility rules, all employees qualify.
- Group all job families or job profiles that share the same configuration together when configuring a compensation benchmark.

Requirements

No impact.

Limitations

You can only load 4 custom fields and 5 percentile fields at a time with the *Import Compensation Survey Job Results* web service. If you need more custom or percentile fields, run the web service again.

Tenant Setup

No impact.

Security

These security domains in the Core Compensation functional area.

Domains	Considerations
Non-Worker Data: External Compensation Benchmark	Provides access to the external compensation benchmark for a non-worker, such as for a job requisition. External compensation benchmark data is provided by compensation survey vendors outside of Workday.
Non-Worker Data: Internal Compensation Benchmark	Provides access to the internal compensation benchmark for a non-worker, such as for a job requisition. Workday aggregates internal compensation benchmark data from employee compensation data internal to your tenant.
Set Up: Compensation Benchmark	Enables you to configure compensation benchmark cycles and generate compensation benchmarks from survey results.
Set Up: Compensation Surveys and Survey Jobs	Enables you to configure survey vendors, products, and jobs.
Set Up: Compensation Survey Job Matches	Enables you to match survey jobs with Workday job profiles.
Set Up: Compensation Survey Results	Enables you to configure and load survey results: • Components. • Custom fields. • Percentiles. • Result sets.

Domains	Considerations
	• Scopes.
Worker Data: External Compensation Benchmark	Enables you to create calculated fields for reporting on external compensation benchmarks.
Worker Data: Internal Compensation Benchmark	Enables you to create calculated fields for reporting on internal compensation benchmarks.

Business Processes

No impact.

Reporting

Reports	Considerations
Compensation Survey Jobs	You can use this report to review a survey's job catalog, including job codes, titles, levels, descriptions, families, and functions. With survey job detail and subdetail reference IDs, this report can also help you to prepare the EIB template and update the existing job catalog.
Compensation Survey Jobs and Matches	You can use this report to verify how a survey's jobs match to Workday job profiles.
Compensation Survey Job Matches by Job Profile	You can use this report to verify how Workday job profiles match to compensation survey jobs.
Compensation Survey Results	You can use this report to view survey results of all survey jobs in a selected result set.
Internal Compensation Benchmark for Job Profile(s)	You can use this report to examine how your internal workers are being paid compared with their peers.
Internal Compensation Benchmark for Worker(s)	You can use this standard report for the internal compensation benchmark. You can copy it, create calculated fields, and add them to your copy.
Review Compensation Benchmark Cycle	You can use this report to review configurations contributing to the benchmark of a job family group, a job family, a job profile, or the entire cycle.
Review Compensation Benchmark Data	You can use this report to review the compensation benchmark data of multiple job family groups, job families, or job profiles.
Compensation Survey Results by Job Profile	You can use this report to view survey results for survey jobs that match selected Workday job profiles or job families from specified survey result sets.
Worker and Compensation Data for Survey Job Matches	You can use this report to: • Collect employee compensation data for each employee.

Reports	Considerations
	• Match the employee's job profile to the survey job. • Prepare employee data for survey submission. The survey you select determines the survey jobs and matches. The effective date determines the employee data.

Integrations

Workday provides these public web services to support compensation survey management:

Web Services	Description
Import Compensation Benchmark Configuration	Import a calculated benchmark cycle, including benchmark cycle data, weight method, and age to date.
Import Compensation Benchmark Data	You can create benchmark data outside of Workday and load it with this EIB.
Import Compensation Survey Job Details *Put Compensation Survey Job Detail*	After setting up compensation survey vendors, products, and surveys, use these web services to create and update the survey job catalog.
Import Compensation Survey Job Results	Set up compensation survey: • Components. • Custom fields. • Percentiles. • Result sets. • Scopes. Then use this web service to load survey results into Workday.
Put Compensation Survey Job Matches	Use this web service to match survey jobs with Workday job profiles.

Connections and Touchpoints

Compensation Survey Management touches the Staffing functional area, especially regarding job profiles.

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: Manage External Compensation Surveys, Job Catalog, and Job Matches on page 1012
Steps: Configure External Compensation Benchmarks from Survey Results on page 1016
Steps: Configure Internal Compensation Benchmarks on page 1022

Reference

Reference: Workday Compensation Benchmark Solutions on page 1025

Steps: Enable Machine Learning for Compensation Benchmark Job Matching

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

Using machine learning, Workday:

- Analyzes the data in your tenant that defines the job profiles and jobs from compensation surveys.
- Matches skills across jobs.
- Recommends jobs from compensation surveys to match with a job profile.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.

   On the Innovation Services Opt-In task, select the HCM ML Features and Third Party Connectors GA service on the Available Services tab in the HCM category.
2. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality.

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.
3. Wait until the next business day for Workday to extract and index survey jobs.
4. Test your configuration in your implementation tenant only.
   a) Access the Run On-Demand Machine Learning Activation for Implementation Tenant task.
   b) Select HCM ML Features and Third Party Connectors GA.

      If you've updated your survey or job profile data, you can run this task only 1 time each day to refresh your suggestions.
   c) Access the Maintain Weekly Machine Learning Activation for Implementation Tenant task to test on an ongoing basis.

   Security: *Manage: Innovation Services* in the Innovation Services functional area.

Result

With machine learning enabled, Workday:

- Makes recommendations for matching jobs with Workday job profiles on the Edit Compensation Survey Job Matches task.
- Uses your mapping of Workday job profile levels to survey job levels on the Maintain Compensation Survey Job Level Mapping task. This enables machine learning to recommend survey jobs of the right level.

Next Steps

- Match survey jobs with Workday job profiles on the Edit Compensation Survey Job Matches task to enable machine learning recommendations for job matches with Workday job profiles.
- Map Workday job profile levels to survey job levels on the Maintain Compensation Survey Job Level Mapping task to ensure better machine learning recommendations.

Related Information

Tasks

Steps: Configure External Compensation Benchmarks from Survey Results on page 1016

Reference

Workday Community: Available Innovation Services – Service Descriptions and Exhibits

Workday Community: Compensation Survey Job Match

Workday Community: Workday Machine Learning

Reference: Edit Tenant Setup - HCM

Steps: Manage External Compensation Surveys, Job Catalog, and Job Matches

Context

You can add new and manage existing compensation survey vendors, their products, and their surveys.

Managing compensation surveys is:

- Required if you use calculated external compensation survey benchmark cycles. In this case, you configure how Workday calculates the compensation benchmark.
- Unnecessary if you only use loaded external compensation survey benchmark cycles. For loaded benchmark cycles, you calculate benchmark data outside of Workday and load it using a web service.

Steps

1. Access the Maintain Compensation Survey Vendors and Products task.

   Add 1 or more Vendor and Product combinations. Each vendor can have 1 or more products. You can't remove vendors and products if you've created compensation surveys for them.

   You can click Usage Count to see where the product is used.

   Security: *Set Up: Compensation Surveys and Survey Jobs* domain.

2. Access the Maintain Compensation Surveys task.
    a) Select a Vendor.
    b) Select a Product.
    c) Add 1 or more Survey Date and Survey Name rows.

       You can delete a row as long as there are no associated jobs.
    d) Add 1 or more Compensation Eligibility Rules for each row, if necessary.

       Eligibility rules associate positions or job requisitions in Workday to surveys, job details, or job specialties. If you add more than 1 compensation eligibility rule per row, Workday associates positions or job requisitions with the survey when they meet any 1 rule.

       If you don't set up eligibility rules:

       - On a compensation survey, all employees qualify for that survey.
       - On a match between a survey job and a job profile, Workday matches all employees on the job profile to the survey job.

       Security: *Set Up: Compensation Surveys and Survey Jobs* domain.
3. Create and update the survey job catalog with these web services:

    - *Import Compensation Survey Job Details*.
    - *Put Compensation Survey Job Detail* to load a survey job catalog.

   Security: *Set Up: Compensation Surveys and Survey Jobs* domain.
4. Match survey jobs with Workday job profiles.

   You can do this on the Edit Compensation Survey Job Matches task. If you've enabled machine learning for compensation benchmark job matching, Workday makes machine learning recommendations.

   You can also match survey jobs with Workday job profiles using the *Put Compensation Survey Job Matches* web service.

   The Find Compensation Survey Jobs task provides multiple criteria by which you can identify survey jobs for matching.

   On the Edit Compensation Survey Job Matches task, select surveys and as you add 1 or more job matches, consider:

Option	Description
Job Profile	Select a Workday job profile to match to compensation survey jobs.
Include Matches from Surveys	Select the surveys you want to assign job matches for the job profile.
Survey	Select 1 of the surveys ones you selected previously.
Survey Job	Select a job from the survey.
Job Match Eligibility Rules	Select 1 or more job match eligibility rules. The job match only applies to employees or job requisitions that meet an eligibility rule.

   With the *Put Compensation Survey Job Matches* web service, consider:

To accomplish this...	Do this...
Match a survey job in the survey to a Workday job profile.	Enter 1 line with the survey job from the survey and the Workday job profile.

To accomplish this...	Do this...
Delete a match between a survey job in the survey and a Workday job profile.	Enter the survey job without the Workday job profile.
Match a survey job in the survey to multiple Workday job profiles.	Enter multiple lines with the survey job from the survey for each Workday job profile.
Match multiple survey jobs to a Workday job profile.	Enter multiple lines with each survey job from the survey and the Workday job profile.
• Match the same survey job to different job profiles in different locations. • Match workers, positions, or job requisitions in a specific organization or location to a survey job.	Enter compensation eligibility rules for the job detail or subdetail. The compensation survey job detail or subdetail matches only workers, positions, or job requisitions that meet 1 or more compensation eligibility rules.

Note: The *Put Compensation Survey Job Matches* web service updates or appends existing job matches in Workday. Only the job matches you add or change affect existing job match data.

Security: *Set Up: Compensation Survey Job Matches* domain in the Core Compensation functional area.

5. Access the Maintain Compensation Survey Job Level Mapping task.

   Map Workday job profile levels to survey job levels. If you've enabled machine learning for compensation benchmark job matching, Workday uses your mapping practices to make recommendations.

   Security: *Set Up: Compensation Survey Job Matches* domain in the Core Compensation functional area.
6. Access the Maintain Compensation Survey Jobs task.

   Add a Survey Job Code and 1 or more jobs, including title, level, function, family, and 1 or more specialties. You can also use the Add Compensation Survey Jobs or Edit Compensation Survey Jobs tasks.

   Example: SMP-C2034, Technical Writer 1, Level 1, Sr. Technical Writer, Maintain Admin Guide, Information Development, Admin Guide.

   To delete survey jobs, access the Delete Compensation Survey Jobs by Survey task.

   Security: *Set Up: Compensation Surveys and Survey Jobs* domain.

Next Steps

- Steps: Manage External Compensation Survey Results on page 1015.
- Access these reports:
  - Compensation Survey Jobs
  - Compensation Survey Jobs and Matches
  - Compensation Survey Job Matches by Job Profile
  - Worker and Compensation Data for Survey Job Matches

Related Information

Concepts

Concept: EIB Spreadsheet Data Entry Guidelines

Tasks

Create Eligibility Rules for Compensation on page 986

Steps: Manage External Compensation Survey Results

Prerequisites

Set up compensation survey vendors, products, and the job catalog.

Context

After you've set up compensation survey vendors, products, and the job catalog, configure survey:

- Components.
- Custom fields.
- Percentiles.
- Result sets.
- Scopes.

Then run the *Import Compensation Survey Job Results* web service.

Steps

1. Access the Maintain Compensation Survey Components task.

   Enter 1 or more compensation survey components and their order.

   Example: Base Pay, Bonus, Total Cash.

   Enter the *Reference ID* or *Workday ID* of the compensation components you created into the First Component through Sixth Component columns of the *Import Compensation Survey Job Results* EIB.

   If you need to load more than 6 compensation components, run the *Import Compensation Survey Job Results* web service more than once.

   Security: *Set Up: Compensation Survey Results* domain.
2. (Optional) Access the Maintain Compensation Survey Result Custom Fields task.

   This step is unnecessary if you used loaded compensation benchmark cycles.

   Enter 1 or more custom fields, and consider:

Option	Description
Numeric	The custom field is always a numeric value. Example: the Number of Employees custom field is always numeric.
Inherit Currency Type from Compensation Component	Inherits the currency type from the compensation component. Example: If the compensation component is Base Pay, the Average custom field is a currency. If the component is Bonus Target Percent, the Average custom field isn't a currency.

   Enter the *Reference ID* or *Workday ID* of the custom fields you created in the First Custom Type through Fourth Custom Type columns of the *Import Compensation Survey Job Results* EIB.

   If you need to load more than 4 custom fields per compensation component, run the *Import Compensation Survey Job Results* web service more than once. You can also use percentile fields to store custom fields.

   Security: *Set Up: Compensation Survey Results* domain.
3. Access the Maintain Compensation Survey Result Percentiles task.

   Enter 1 or more percentile name and value rows. Use only integers to represent each percentile value. Example: Enter 25th for the Percentile Name and 25 for the Percentile Value.

   Alternatively, you can use the *Import Compensation Survey Job Results* EIB and web service. Enter the *Reference ID* or *Workday ID* of the percentile fields you created in the First Percentile through Fifth Percentile columns. If you need to load more than 5 percentiles per compensation component, run the *Import Compensation Survey Job Results* web service more than once. You can also use custom fields to store percentiles.

Security: *Set Up: Compensation Survey Results* domain.

4. (Optional) Access the Maintain Compensation Survey Result Sets task.

   This step is unnecessary if you used loaded compensation benchmark cycles.

   For each survey, enter 1 or more result set names and effective dates.

   Example: A compensation survey releases results quarterly. Enter:

   - Q1 2020 and 01/01/2020.
   - Q2 2020 and 04/01/2020.
   - Q3 2020 and 07/01/2020.
   - Q4 2020 and 10/01/2020.

   Security: *Set Up: Compensation Survey Results* domain.
5. (Optional) Access the Maintain Compensation Survey Scopes task.

   This step is unnecessary if you use loaded compensation benchmark cycles.

   For each vendor, enter 1 or more compensation survey scopes. For each survey scope, you can select 1 or more eligibility rules. Example: If the survey results of this scope apply only to employees in the San Francisco Bay Area, enter:

   - *San Francisco Bay Area* for the scope, and
   - *Location is San Francisco Bay Area* for the eligibility rule.

   When configuring a calculated benchmark cycle, you can select survey result scopes to apply specific survey results to a benchmark profile.

   Security: *Set Up: Compensation Survey Results* domain.
6. (Optional) Run the *Import Compensation Survey Job Results* web service to load survey results.

   This step is unnecessary if you used loaded compensation benchmark cycles.

Next Steps

To delete survey results, access the Delete Compensation Survey Results .

Access the Compensation Survey Results and Compensation Survey Results by Job Profile reports.

Related Information

Concepts

Concept: EIB Spreadsheet Data Entry Guidelines

Tasks

Create External Compensation Survey Benchmark Cycles on page 1018

Steps: Configure External Compensation Benchmarks from Survey Results

Context

You can use data from multiple external market surveys to calculate compensation benchmarks to guide you during compensation transactions.

Steps

1. Access the Maintain Compensation Benchmark Profiles task.

   Enter 1 or more benchmark profiles and 1 or more compensation benchmark eligibility rules for each. Workday links employees and job requisitions to benchmark profiles based on eligibility rules.

   A benchmark profile usually corresponds to a location, which can have its own market data.

   To determine which compensation benchmark profile to use for the external compensation benchmark of an employee, Workday determines which benchmark profile the employee is eligible for. If an employee is eligible for multiple benchmark profiles, Workday uses the highest ranked eligible benchmark profile.

   Rank the benchmark profiles according to usage. Example: Rank San Francisco ahead of United States. If most of your employees are in the United States, rank United States ahead of other countries.

   Security: *Set Up: Compensation Benchmark* in the Core Compensation functional area.
2. Access the Maintain Compensation Benchmark Targets and Spreads task.

   As you complete this task, consider:

Option	Description
Job Families or Groups / Job Profiles / All Job Profiles	Select 1 option: • 1 or more job family groups. • 1 or more job families. • 1 or more job profiles. • All job profiles.
Compensation Components / All Compensation Components	Select 1 or more compensation components from the list or select all.
Target Percentile	The percentile that you configured as the target of a compensation composite. Examples: 25th, 50th, 75th.
Range Spread, %	Enter a percentage. Workday calculates the minimum and maximum: • Minimum = Midpoint / (1 + 0.5 * Range Spread). • Maximum = (1 + Range Spread) * Minimum. Example: If the 50th percentile of the compensation benchmark is 110,000, and you select the 50th percentile as the composite target percentile, Midpoint is 110,000. If the Range Spread is 20%, Minimum is 100,000 and Maximum is 120,000.

   Security: *Set Up: Compensation Benchmark* in the Core Compensation functional area.
3. Create External Compensation Survey Benchmark Cycles on page 1018.

   Security: *Set Up: Compensation Benchmark* in the Core Compensation functional area.

4. Reporting on Compensation Benchmarks on page 1023.

   You can access the: Review Compensation Benchmark Data report to review the external compensation benchmark of job profiles.

   You can also create custom reports for:

   - External compensation benchmark for job profiles.
   - Current compensation assignment and pay range from compensation grade and grade profile.
   - External and internal compensation benchmark for employees.

   Security: *Worker Data: External Compensation Benchmark* and *Worker Data: Internal Compensation Benchmark* in the Core Compensation functional area.

Next Steps

Access:

- Delete Compensation Benchmark Cycle task.
- View Compensation Benchmark Cycles report.

Related Information

Concepts

Setup Considerations: Compensation Survey Management and Compensation Benchmark on page 1005

Reference

Reference: Edit Tenant Setup - HCM

Create External Compensation Survey Benchmark Cycles

Prerequisites

Security: *Set Up: Compensation Benchmark* in the Core Compensation functional area.

Context

You can create either a calculated or loaded external compensation survey benchmark cycle type:

- Calculated: You configure how Workday calculates the compensation benchmark using either the Create Compensation Benchmark Cycle task or the *Import Compensation Benchmark Configuration* web service.
- Loaded: You calculate benchmark data outside of Workday and load it into Workday using either the Create Compensation Benchmark Cycle task or the *Import Compensation Benchmark Data* web service.

For calculated external compensation survey benchmark cycles, you can configure benchmark weight, adjustment, and aging factors on a single row, provided job profiles or job families share the same configuration.

If a job profiles or job families have varying attributes, you can configure them on multiple rows.

For ease of management and review, Workday recommends that:

- For a compensation benchmark of a job family group, job family, or job profile, keep configurations of all benchmark profiles together.
- For a compensation benchmark profile, keep configurations of all compensation components together.

For weights and adjustments, configurations can differ for each compensation component (such as base pay or total cash target) at each location for each job profile. For annual aging factor, you can also assign a different value per compensation component per location per job profile.

Steps

1. Access the Create Compensation Benchmark Cycle task.
2. Select a Compensation Benchmark Cycle Type.

Option	Description
Calculated	Select this option to configure a benchmark cycle within Workday. Configure weights, adjustments, and aging factors to calculate benchmarks from survey results.
Loaded	Select this option if you calculate benchmark data outside of Workday. Configure Workday to receive the data, then load your calculated benchmark data into Workday.

3. (Optional) Configure a Calculated benchmark cycle:

   As you complete this task, consider:

Option	Description
Weight Method	For calculated benchmarks, select: • Equal Weight Among Surveys: Workday weights the selected surveys equally. If a job profile matches multiple jobs in a survey, Workday divides the weight for that survey evenly among the jobs. • Manual Weight: Manually configure weight among surveys. • Weight by Survey Result Custom Field: Workday calculates the weight of each survey for each compensation component based on the relative ratio of selected custom fields. Example: The compensation component Base Pay for the Software Engineer 1 job profile comes from the: ◦ 2021 Radford GTS survey, with 1,500 companies contributing data. ◦ 2021 Mercer TRS survey with 500 companies contributing data. Radford has a weight of 1,500 / (1,500 + 500) = 75%. Mercer has a weight of 500 / (1,500 + 500) = 25%.
Configuration Effective Date	The effective date of the benchmark cycle remains in effect until a cycle with a later date becomes effective.
Age to Date	Workday ages compensation survey results to this date using annual aging factors.
Job Families or Groups / Job Profiles / All Job Profiles	Select 1 option: • 1 or more job family groups. • 1 or more job families. • 1 or more job profiles. • All job profiles.
Benchmark Profile	Select 1 of your benchmark profiles.
Compensation Components / All Compensation Components	Select 1 or more compensation components from the list or select all. Workday only ages components you select.

Option	Description
Survey / Survey Result Set	For Weights and Adjustments, select a compensation survey or survey result set. If you select a survey for this field, Workday uses the survey result set with the latest effective date from the selected survey. Some surveys release survey results multiple times per year. When you create and load a new survey result set, Workday uses data from the latest survey result set without updating benchmark cycle configuration.
Surveys / Survey Result Sets	For Annual Aging Factors, elect 1 or more compensation surveys or survey result sets. If you select a survey, Workday applies aging to all result sets in this survey. If you select a survey result set, Workday applies aging only to the selected survey result set.
Survey Result Scope	For Weights and Adjustments, select a scope that belongs to the vendor of the survey or survey result set and applies to the selected benchmark profile. Example: If the benchmark profile is *San Francisco, CA, US*, select the *San Francisco Bay Area* survey result scope.
Survey Result Scopes / All Survey Result Scopes	(Optional) For Annual Aging Factors, if configured, Workday applies aging only to the scope of your selected surveys or survey result sets. If left blank, Workday applies aging to all scopes of your selected surveys or survey result set.
Weight Factor, %	For Weights and Adjustments, enter a percentage. Example: 10 is 10%. Weight factors must total 100% for a compensation component.
Adjustment Factor, %	For Weights and Adjustments, enter a percentage. Example: 10 for 10%.

Option	Description
Aging Factor, %	(Optional) For Annual Aging Factors, enter a percentage. Example: 10 is 10%.

Workday calculates the benchmark using this formula:

```
sum(Cn * Wn* (1 + ADJn) * (1 + An))
```

Where:

- *Cn*: Compensation component value for the nth source of survey result data.
- *Wn*: Weight factor for the nth source of survey result data.
- *ADJn*: Adjustment factor for the nth source of survey result data.
- *An*: Aging factor for the nth source of survey result data. The aging factor is proportional to the annual aging factor and is based on the duration in months between:
    - The compensation benchmark cycle age to date.
    - The survey result set effective date.

  Example:

    - The annual (12 months) aging factor is 3% (0.03).
    - The survey result set effective date is 4/1/2020 and the benchmark cycle age to date is 10/1/2021 (18 months).
    - The aging factor is: 0.03 * 18 / 12 = 0.045 (4.5%).

Workday uses lower level configurations to override higher level configurations, in this order:

a. Job profile.
b. Job family.
c. Job family group.
d. All job profiles.

4. (Optional) Configure a Loaded benchmark cycle for the compensation benchmark data you calculated outside of Workday.

   As you complete this task, consider:

Option	Description
Job Profile	Enter a job profile.
Benchmark Profile	For each job profile, enter a benchmark profile, a currency, and a frequency.
Compensation Component	For each benchmark profile, enter a compensation component.
Percentile	For each compensation component, enter a percentile.
Benchmark Amount	Enter a benchmark amount.

   After you finish your configuration here, load your calculated data using the *Import Compensation Benchmark Data* web service EIB.

Next Steps

Access:

- Edit Compensation Benchmark Cycle task.
- Review Compensation Benchmark Cycle report.

- Review Compensation Benchmark Data report to review the calculated benchmark data for selected job family groups, job families, or job profiles.

Related Information

Tasks

Steps: Manage External Compensation Surveys, Job Catalog, and Job Matches on page 1012

Steps: Manage External Compensation Survey Results on page 1015

Steps: Configure External Compensation Benchmarks from Survey Results on page 1016

Reference

Reference: Workday Compensation Benchmark Solutions on page 1025

Steps: Create Shadow Compensation Pay Ranges

Prerequisites

Configure compensation benchmark profiles.

Context

You can compare the compensation grades and profiles you have in Workday to those of the benchmark. The Generate Shadow Compensation Pay Ranges task creates shadow compensation pay range segments based on the number of segments in the Workday parent pay range, grade, and grade profile. You can then use the Shadow Compensation Pay Range Comparison report to compare Workday pay ranges to their shadow counterparts.

Workday generates shadow compensation pay ranges when:

- A compensation benchmark cycle exists with data for the selected job profile.
- The pay range grade or grade profile for the job profile has the same eligibility rule or rules as a benchmark profile type in the benchmark cycle. If no eligibility rules are configured on the pay range, Workday uses the default from the benchmark cycle.
- A benchmark target configuration exists for the selected job profile.

Steps

1. Access the Maintain Compensation Benchmark Targets and Spreads task.
2. Access the Create Compensation Benchmark Cycle task.
3. Access the Generate Shadow Compensation Pay Ranges task.

   Select 1 or more job profiles and optionally select a compensation basis.

   Security: *Set Up: Compensation Benchmark* domain in the Core Compensation functional area.
4. Access the Shadow Compensation Pay Range Comparison report.

   Select 1 or more job profiles or 1 or more compensation bases for which you've generated shadow compensation pay ranges.

   The report displays grade profiles and their segments, currency, and frequency for both Workday and the shadow benchmark. You can then compare your current profiles to benchmark data.

   Security: *Set Up: Compensation Benchmark* domain in the Core Compensation functional area.

Steps: Configure Internal Compensation Benchmarks

Context

You can use data from within your own tenant to create internal compensation benchmarks.

Workday calculates the internal compensation benchmark of an employee using the 100% FTE value of each position included in the calculation. Workday includes primary or secondary positions with active employees that share the same job profile, compensation grade, and grade profile as the primary position of the employee. Workday excludes compensation basis values of zero and basis amounts for positions that aren't eligible for the selected compensation basis.

For terminated employees, Workday calculates the internal compensation benchmark based on positions that matched the terminated employee's primary position as of their last day of work.

Steps

1. Access the Edit Tenant Setup - HCM task.

   You can enable more meaningful internal benchmarks while safeguarding sensitive employee data.

   In the Compensation section, enter a value for Internal Compensation Benchmark Threshold.

   The threshold is the number of employees in outside organizations that a manager must have access to for Workday to include them in the benchmark calculation. If the manager doesn't have access to any employee data outside of their organization, the threshold has no effect.

   Workday displays job profile data according to the configured threshold to balance the needs for meaningful information while keeping sensitive data secure. A higher threshold value ensures the security of sensitive pay information, but might result in less meaningful information. A low threshold value might display more meaningful information, but risks a manager being able to deduce the pay of specific employees in outside organizations.

   Example: When Astrid accesses the benchmark of Brendt, Workday determines access to the compensation of all employees, regardless of organization, that share Brendt's job profile, compensation grade, and grade profile.

   - If yes, Astrid can see the internal benchmark derived from all employees.
   - If no, Workday determines the number of employees not in Astrid's organization sharing the same job profile, compensation grade, and grade profile. Workday then compares that number to the threshold.
     - If the number is greater than or equal to the threshold, Astrid can see the internal benchmark derived from all employees, regardless of organization.
     - If the number is less than the threshold, Astrid can only see Brendt's internal benchmark. Brendt's internal benchmark comes from those employees Astrid already has access to and that share the same job profile, compensation grade, and grade profile.

   Security: *Set Up: Compensation Benchmark* in the Core Compensation functional area.
2. Reporting on Compensation Benchmarks on page 1023.

   Access the Internal Compensation Benchmark for Workers standard report. You can compare the current compensation assignment for the primary position to the internal benchmark on the Total Base Pay and Total Salary & Allowances compensation bases.

   You can create a custom report to display current compensation assignment for the primary position, pay range from compensation grade (profile), and internal compensation benchmark of employees.

   Security: *Worker Data: Internal Compensation Benchmark* in the Core Compensation functional area.

Related Information

Tasks

Steps: Manage External Compensation Surveys, Job Catalog, and Job Matches on page 1012

Reference

Workday Community: Overview of Primary Position Designation Impact

Reporting on Compensation Benchmarks

Prerequisites

- Set up compensation survey vendors, products, and the job catalog for external benchmarks.
- Create compensation benchmark cycles for external benchmarks.

- Configure external compensation benchmarks from survey results.
- Security:
  - *Set Up: Compensation Benchmark* in the Core Compensation functional area.
  - *Worker Data: External Compensation Benchmark* in the Core Compensation functional area.
  - *Worker Data: Internal Compensation Benchmark* in the Core Compensation functional area.

Context

External compensation benchmark data comes from these sources:

- Workday generates it from compensation survey market data.
- You load it into compensation benchmark cycles.

Workday generates internal compensation benchmark data from within your tenant.

Business objects for external and internal compensation benchmark data include:

- Compensation Benchmark Composite.
- External Compensation Benchmark.
- External Compensation Benchmark Composite.
- External Compensation Benchmark Configuration.
- Internal Compensation Benchmark.

To provide data from the proper context, use compensation benchmark report fields with these adapter fields:

- External Compensation Benchmark Composite for Job Profile.
- External Compensation Benchmark Composite for Worker.
- External Compensation Benchmark for Job Profile.
- External Compensation Benchmark for Worker.
- Internal Compensation Benchmark for Worker.
- Internal Primary Compensation Basis Benchmark for Worker.

Use these data source filters to select workers or job profiles:

- Workers by Job Profile and Compensation Grade on the Workers for HCM Reporting data source.
- Job Profile by Name, Family, and Family Group on the All Active Job Profiles data source.

Large volumes of workers or job profiles increases report run times. Workday recommends that you minimize the number of workers or job profiles.

Steps

1. Access the Create Calculated Field task.

   Example for an external compensation benchmark:

Option	Description
Business Object	*Worker*
Function	*Lookup Field with Prompts*
Source Field	If you want to report the benchmark percentile value, select *External Compensation Benchmark for Worker*. If you want to report the composite target percentile, range spread, minimum, mid-point, and maximum, select *External Compensation Benchmark Composite for Worker*.
Compensation Component	Select the component you want to report on, such as Base Pay.

Option	Description
	You can create multiple calculated fields to report external compensation benchmark for different compensation components.

Example for an internal compensation benchmark:

Option	Description
Business Object	*Worker*
Function	*Lookup Field with Prompts*
Source Field	If you want to report the internal benchmark of a compensation basis, select *Internal Compensation Benchmark for Worker*.
Compensation Basis	If you use *Internal Compensation Benchmark for Worker* as the Source Field, select the compensation basis you want to report on, such as Base Pay. You can create multiple calculated fields to report internal compensation benchmark for different compensation bases.

2. Create a custom report to display the compensation benchmark for employees.

   For the internal compensation benchmark, copy the Internal Compensation Benchmark for Worker(s) standard report as a custom report.

   Example:

Option	Description
Data Source	Workers for HCM Reporting
Data Source Filter	Workers by Job Profile and Compensation Grade
Primary Business Object	Worker

Add the calculated fields and report fields for the compensation benchmark. You can also add report fields for employee's current compensation assignments and pay range to compare with another benchmark.

This report provides information only on the:

- Primary position for those workers with more than 1 position.
- Workers that match the criteria selected in the report prompts on their primary position details.

Related Information

Tasks

Steps: Configure External Compensation Benchmarks from Survey Results on page 1016

Steps: Configure Internal Compensation Benchmarks on page 1022

Reference: Workday Compensation Benchmark Solutions

Workday provides these compensation benchmark solutions:

External Compensation Survey Benchmark	Internal Compensation Benchmark
Workday derives the external compensation benchmark using data from external market survey vendors.	Workday derives the internal compensation benchmark using the compensation of employees sharing the same job profile, compensation grade, and grade profile in the tenant.

External Compensation Survey Benchmark	Internal Compensation Benchmark
Steps: Configure External Compensation Benchmarks from Survey Results on page 1016	Steps: Configure Internal Compensation Benchmarks on page 1022

Related Information
Concepts
Setup Considerations: Compensation Survey Management and Compensation Benchmark on page 1005

Steps: Set Up Benchmark Jobs

Prerequisites

Note: Workday recommends that you use our new, more robust compensation benchmarking solution, accessible through these tasks and reports:

- Create, Edit, Review, and Delete Compensation Benchmark Cycle.
- Maintain Compensation Benchmark Profiles.
- Review Compensation Benchmark Data.
- View Compensation Benchmark Cycles.

Security: *Set Up: Benchmark Jobs* domain in the Core Compensation functional area.

Context

You can manually load composite market data from compensation surveys. You can see which workers are below, at, or above market level when making compensation changes.

Steps

1. (Optional) Access the Maintain Benchmark Job Settings task.

Option	Description
Compare Primary Compensation Basis to Total Cash	Total Cash market data displays on market salary compensation tasks and reports for comparison.
Benchmark Percentile Defaults	Workday uses the percentiles you select here to create rows for manually entering data when creating or editing benchmark jobs.

2. Access the Create Benchmark Job task.
3. In the Default Benchmark Data section, consider:

Option	Description
Competitive Market Target	Select the percentile that you consider the at-market level for this benchmark job.
Target Spread %	The salary range that you consider your at-market level. Example: If you select 50th as your Competitive Market Target: • Enter 10% as the Target Spread, and • 50,000 as the salary Amount for the 50th Percentile.

Option	Description
	The salary spread for this benchmark job is 47,500 - 52,500. Any employee with a base salary that falls within this range is considered at-market level.

4. In the Profile Market Data section, you can define different values for specific employee populations using eligibility rules. If an employee matches the criteria defined by the eligibility rule, Workday uses the Profile Market Data section values instead.

Next Steps

You can access these reports:

Report	Description
Benchmark Jobs Audit	Displays a list of job profiles not associated to a benchmark job.
Direct Reports Market Position	Displays the number of workers that are Above Market, Below Market, At Market, and Blank (not mapped to a benchmark job.)
Job Profile Market Position	Compares the average total base pay to the market for selected job profiles.
Organization Market Position	Displays workers by organization that are Above Market, Below Market, At Market, and Blank (not mapped to a benchmark job).

Manage Compensation Plan Assignments

Roll Out Compensation Plans to Employees

Prerequisites

- Create compensation plans.
- Security: *Process: Compensation Plan Employee Management* domain in the Core Compensation functional area.

Context

You can assign, or roll out, compensation plans to a group of target employees. This process bypasses reviews and approvals, enabling you to assign plans to employees immediately.

You can use the Rollout Compensation Plans to Employees task to assign compensation plans of all types except hourly and salary. To assign hourly and salary plans, use the Request Compensation Change task or web service.

Steps

1. Access the Rollout Compensation Plans to Employees task.
2. Select an Effective Date.

   Workday generates *Request Compensation Change* process events that assign the plans you select to the target employees on this date.
3. Select the Compensation Plans to assign.

4. (Optional) Enter an Expected End Date and an Actual End Date.

   Actual End Date displays only if Enable Actual End Date is selected on the Edit Tenant Setup - HCM task.

   The Expected End Date is an estimate for when the employee's assignment to a salary, hourly, or allowance plan ends. To remove compensation plans from employees based on the Expected End Date, access the Schedule Remove Compensation Plans with Expected End Date task.

   If you enter an Actual End Date, Workday automatically removes the compensation plan assignment from the employee at 11:59:59 PM on that date. If there are future-dated events, Workday doesn't remove the plan assignment.

   The Schedule Remove Compensation Plans with Expected End Date task ignores compensation plan assignments with an Actual End Date. Workday only removes employees from compensation plan assignments on this schedule if there's no Actual End Date configured for the compensation plan assignment.
5. Select the employees to assign the specified plans, either By Compensation Eligibility Rule or By Selected Employees.

   If you use the By Selected Employees option, Workday lists the first 50 employees. Workday doesn't list any individual employees selected using By Compensation Eligibility Rule.

Result

As of the effective date specified, Workday generates a *Request Compensation Change* event for the target employees and adds a row to their compensation history.

Next Steps

Access the View Compensation Plan Rollout Process report to view complete lists of the affected employees. The Employees receiving Compensation Plan field displays the eligible or selected employees that are affected. The Employees not receiving Compensation Plan field displays the eligible or selected employees that are unaffected.

Related Information

Tasks

Create Allowance Plans on page 1082

Create Commission Plans on page 1086

Create One-Time Payment Plans on page 1126

Set Up Segmented Security by Compensation Plans on page 1047

Steps: Set Up Bonus Plans on page 1092

Steps: Set Up Merit Plans on page 1088

Steps: Manage Stock Plans and Grants on page 1109

Reference

Reference: Compensation Plan Comparisons on page 1064

FAQ: Propose Compensation on page 1036

Remove Compensation Plans from Multiple Employees

Prerequisites

Security: *Process: Compensation Plan Employee Management* domain in the Core Compensation functional area.

Context

Remove allowance, bonus, commission, hourly, merit, and stock plan assignments from a target population of employees. This process bypasses reviews and approvals.

Steps

1. Access the Remove Compensation Plans from Employees task.
2. Select the Effective Date on which you want this process to create the compensation change requests to remove the target employees from the specified plans.
3. Select the Compensation Plans (both active and inactive) that you want to remove from the target population of employees.
4. Select Employees to remove from the specified plans, either By Compensation Eligibility Rule or By Selected Employees.
   If you use By Selected Employees, Workday lists the first 50 employees either included in the process or not included because they are in a pending compensation event. Workday does not list any individual employees selected using By Compensation Eligibility Rule.

Related Information
Tasks
Steps: Add or Remove Employees to or from Compensation Reviews on page 1208

Remove Compensation Plans with Expected End Date

Prerequisites

- Create allowance, hourly, and salary plans.
- Create event using the Maintain Event Categories and Reasons task.
- Security: *Process: Compensation Plan Events* domain in the Core Compensation functional area.

Context

Remove salary, hourly, or allowance plan assignments from a target population of employees if the compensation plan assignments have an Expected End Date. This administrative process and doesn't include reviews or approvals.

Steps

1. Access the Schedule Remove Compensation Plans with Expected End Date task.
2. In the Process Details section, consider:

Option	Description
Effective Date Options	Determines the date on which Workday removes the compensation plan assignments from the employee.
Effective as of Date	Available if you selected *Specific End Date* in the Effective Date Options field. The date on which Workday removes compensation plan assignments from the employees.
Expected End Date	Available when Run Frequency is *Run Now*. Workday includes in the target population employees with this expected end date on the compensation plan assignments.
Start Date	Available when Run Frequency is *Run Now*. Workday includes in the target population employees with an expected end date on or

Option	Description
	after this start date on the compensation plan assignments.
End Date	Available when Run Frequency is *Run Now*. Workday includes in the target population employees with an expected end date on or before this end date on the compensation plan assignments.

3. In the Plans section, select the compensation plans that you want to remove from the target population of employees.

   You can remove active or inactive plans.
4. Click the Schedule tab and complete the Recurrence Criteria and Range of Recurrence information.

   Available when the Run Frequency doesn't equal *Run Now*.

Result

As of the effective date specified, Workday generates a *Request Compensation Change* event for the target employees and adds a row to their compensation history.

This process ignores compensation plan assignments with an Actual End Date. Workday only removes employees from compensation plans if there's no Actual End Date configured.

Next Steps

Access the View Compensation Plan Remove Process report to view complete lists of the affected employees. The Employees removing Compensation Plan field displays the eligible or selected employees that are affected. The Employees not removing Compensation Plan field displays the eligible or selected employees that are unaffected.

Related Information

Tasks

Steps: Add or Remove Employees to or from Compensation Reviews on page 1208

Steps: Propose Compensation for Employees or Positions on page 1032

Set Up Adjustments to Unit Salary, Hourly, Allowance, and Commission Plans

Prerequisites

- Configure these business processes to meet your needs:
  - *Set Up Unit Salary Plan Adjustment*
  - *Set Up Hourly Plan Adjustment*
  - *Set Up Allowance Plan Adjustment*
  - *Set Up Unit Allowance Plan Adjustment*
  - *Set Up Commission Plan Adjustment*
- Define reasons for *Request Compensation Change* event using the Maintain Event Categories and Reasons task.

Context

You can make adjustments to a unit-based salary, hourly, allowance, and commission plans. Workday then adjusts the compensation amount for all employees in the plan.

Steps

1. Access the appropriate task:
    - Set Up Unit Salary Plan Adjustment
    - Set Up Hourly Plan Adjustment
    - Set Up Allowance Plan Adjustment
    - Set Up Unit Allowance Plan Adjustment
    - Set Up Commission Plan Adjustment
2. Select the compensation plan.

    If the plan you want to adjust already has an adjustment in progress, you can't select the plan.
3. (Optional) For allowance plans, select Retain Basis Total for MBT Employees on the Set Up Allowance Plan Adjustment task.

    If selected, Workday reallocates the compensation basis but retains the basis total. This option affects MBT employees assigned to an allowance plan on a compensation basis with Retain Basis Total selected.
4. Select the Allowed Actions for Employees using Default and Employees using Override for employees assigned to the plan.

Option	Description
Adjust to New Defaults	Applicable to Employees using Default and Employees using Override. Workday sets the assigned value to the new default.
Adjust by Same Amounts	Applicable to Employees using Override. Workday calculates the difference between the old default and the new default, and adjusts the assigned value by that difference. Example: Set the new default to 600 from 500. If the override amount is 700, Workday adjusts the assigned value to 800 because the default increased by 100.

5. Enter the new values.

Result

If you included a review step in the business process, the reviewer approves the request, denies it, or sends it back to the proposer for further revision.

Once approved, the process:

- Updates the plan definition with the new defaults so that future plan assignments have the new values.
- Assigns the plan to the employees and uses eligibility rules to determine if an employee qualifies for a plan profile.
- Creates compensation events with the new values for each impacted employee.

Next Steps

- Access the Compensation Plan End Date Audit report to detect employees with a future dated compensation event that conflicts with the event generated by this process.

    To correct a future dated compensation event, rescind the event and then reprocess it after the adjustment process.

Related Information

Tasks

Create Allowance Plans on page 1082
Create Hourly Plans on page 1077
Edit Business Processes
Create Unit Salary Plans on page 1071
Create Commission Plans on page 1086

Steps: Propose Compensation for Employees or Positions

Prerequisites

- Security:
    - Configure access to the domain for each plan type in both the Core Compensation and the Advanced Compensation functional areas.

      Some plan definitions restrict the ability to override values. If you're using a compensation matrix, Workday can derive the plan target for the employee only after their performance review rating exists.

      Your security policies define the sections that display and the changes you can make when proposing compensation. You can set up compensation plans to not allow individual overrides.
    - For employees managed by a compensation basis total, configure access to the *Compensation Change: Compensation Basis Details* domain in the Core Compensation functional area.
- Configure these business processes if you use the Workday Recruiting *Offer* or *Employment Agreement* business processes.
    - *Propose Compensation Offer/Employment Agreement*.
    - *Request One-Time Payment Offer/Employment Agreement*.
    - *Request Stock Grant Offer/Employment Agreement*.

(Optional) Configure your tenant to not display compensation for previously terminated employees you want to rehire. See Concept: Remove Prior Compensation for Rehires.

Context

You can propose compensation for an employee or a candidate during these business processes:

- *Offer*
- *Employment Agreement*
- *Hire*
- *Request Compensation Change*
- *Change Job*
- *Add Additional Job*
- *Start International Assignment*

You can alternatively update compensation for groups of employees using Enterprise Interface Builder (EIB):

Employee Group	EIB
Existing employees	*Request Compensation Change*
New Hires	*High Volume Event - Hire Employee*

You can also assign default compensation to an approved job or position. Every employee hired into that position gets the same default compensation values.

Workday doesn't allow you to initiate a compensation change for yourself.

Steps

1. Access the Maintain Event Categories and Reasons task.

   Define reasons for the *Request Compensation Change* event.
2. (Optional) Access the Configure Optional Fields task.

   You can hide or require most fields delivered as optional on these business processes:

   - *Change Default Compensation*.
   - *Propose Compensation Change (Change Job)*.
   - *Propose Compensation Hire*.
   - *Propose Compensation Offer/Employment Agreement*.
   - *Request Compensation Change*.
   - *Requisition Compensation*.

   You can set the Criteria column to *Hide For All* or hide from *Security Group* for the Guidelines – Total Base Pay Range and Guidelines – Primary Compensation Basis Pay Range fields.

   You can also select *Not Enterable For* (read only) in the Criteria column for most fields delivered as optional or required.

   Example: You want to display both Salary – Currency and Salary – Frequency during business processes as read only fields. You access the Configure Optional Fields task, select the Propose Compensation Change for Hire functional area, and for both Salary – Currency and Salary – Frequency select *Not Enterable For*. During the *Propose Compensation Change for Hire* process, both fields display as read only and can't be edited.

   Changes made to optional fields apply to all:

   - Compensation plan assignments that are part of the event.
   - Events already in progress and all those going forward.

   Note: Any fields configured as hidden or required remain so even when the business process is used as a subprocess of another business process.

   Security: *Set Up: Configure Optional Fields* domain in the System functional area.
3. (Optional) Configure your tenant to display only relevant plan types during the *Propose Compensation Change* process when used as a step in *Change Job*.

   You can select the Enable Dynamic Display for Compensation Plan Sections tenant option on the Edit Tenant Setup - HCM > Compensation task.

   If selected, Workday displays only relevant compensation plan sections during the *Propose Compensation Change* business process when used as a step on the *Change Job* business process. This applies only for an internal job change or an internal hire.

   See FAQ: Propose Compensation on page 1036.

4. (Optional) Steps: Enable Machine Learning Recommendations for Change Job

   If you opt in to machine learning, Workday recommends up to 5 compensation plans whenever you assign a new compensation plan to a worker in the *Propose Compensation Hire*, *Propose Compensation Change* and *Request Compensation Change* business processes.

   Example: When you add an allowance plan, Workday might suggest Car Allowance, Housing Allowance, or Meal Allowance. Workday uses machine learning to recommend compensation plans most relevant to:

   - You, when making the change, depending on how frequently and recently you assign plans.
   - The worker receiving the assignment, such as eligibility, job profile, or location.

   Workday only displays plans that are active and:

   - The worker is eligible for, unless you have the ability to assign any plan regardless of work eligibility.
   - You have security permissions to add.
5. Access the relevant task or business process:

Use this task or process...	to...
Change Job business process.	Propose new compensation when an employee changes jobs or for promotions, demotions, or transfers. Workday recommends that *Propose Compensation* is either the completion step or is before the completion step.
Create Position or *Edit Position* business processes.	Assign default compensation to a position.
Propose Compensation button in My Tasks.	Propose compensation for a new hire.
Request Compensation Change task.	Change an existing employee's compensation.
Start International Assignment business process.	Propose new compensation when an employee starts an international assignment.

   You can display the current compensation for internal candidates on the Maintain Localization Settings task.

   Select *Internal Candidate Compensation* for the Area.

   Select 1 or more locations from Allow for Countries or Regions. Workday displays the internal candidate's current compensation only if you select their current job's primary location.

   When configuring the *Change Job* or *Edit Position* business process definitions, consider including the *Propose Compensation Change* business process as a step. If not included, Workday recommends as a best practice configuring the *Automatic Compensation Change for Position Change Event* business process security policy to match that of *Propose Compensation Change*.

Workday initiates the *Automatic Compensation Change for Position Change Event* process when both:

- The *Change Job* or *Edit Position* business process doesn't include the *Propose Compensation Change* step.
- Event transactions for either the *Change Job* or *Edit Position* processes result in a compensation-related change, such as location or FTE%.

Because the *Automatic Compensation Change for Position Change Event* process is automatic, there's no user to apply the Employee Visibility Date to the event.

As you propose compensation, consider:

Option	Description
Employee Visibility Date	If configured, Workday hides updated pay-related compensation data from the employee until the date. If left blank, Workday uses the effective date. See: FAQ: Employee Visibility Date on page 1191
Expected End Date	On salary, hourly, or allowance plans, the Expected End Date is an estimate. Access the Schedule Remove Compensation Plans with Expected End Date task to actually remove compensation plan assignments from employees.
Actual End Date	If displayed, the Actual End Date determines when Workday automatically removes the compensation plan assignment from the employee.

Fixed for Manage by Basis Total	Displays only when:
	• The employee is managed by basis total.
	• The Primary Compensation Basis (PCB) includes the compensation plan.
	• The compensation plan allows overrides.
	• The business process is *Change Job*, *Hire*, or *Request Compensation Change*.
	• The compensation plan is:
	    • Allowance Amount Plan.
	    • Allowance Unit Plan.
	    • Bonus Amount Plan.
	    • Commission Plan.
	    • Stock Amount Plan.
	If selected, Workday treats the assigned amount as fixed when performing a top-down calculation on the PCB.

Guidelines	If you change the Grade Step, the Progression Start Date defaults to the effective date of the compensation change event. You can change it to a future date.

Result

After the request is approved, the business process creates a compensation event for the employee that can be tracked in *Worker History*.

If you assigned default compensation to a position, Workday uses the compensation values from the position instead of eligibility rules for staffing transactions with position events.

Note: Workday doesn't rerun eligibility rules if you change plan assignments at the same time you're proposing compensation. Example: If you change a bonus plan, Workday doesn't run eligibility rules to update other compensation values during the same transaction.

Next Steps

- Access the Schedule Remove Compensation Plans with Expected End Date task to remove compensation plan assignments. This task ignores compensation plan assignments with an Actual End Date.
- To review period salary plans, use the Period Salary Plans Manage By Compensation Basis Health report.

Related Information
Concepts
Setup Considerations: Autocomplete Staffing Events on page 519
Remove Compensation Plans with Expected End Date on page 1029
Steps: Set Up Offers on page 489
Steps: Set Up Employment Agreements on page 635
Tasks
Hide or Require Optional Fields

Concept: Remove Prior Compensation for Rehires

You can unassign all compensation from a terminated worker's previous employment upon rehire to help meet compliance requirements. When you select the Remove Prior Compensation for Rehires check box in the Edit Tenant Setup - HCM task, Workday doesn't display a rehire's previous compensation in the *Propose Compensation Hire* step of the *Hire* process.

The Remove Prior Compensation for Rehires tenant setting doesn't apply to:

- *Hire* events that were already In Progress before you turn the setting on.
- Former workers without a record of prior compensation.
- Hiring or converting contingent workers that have no prior compensation plan assignments.
- Internal hires processed through the *Change Job* process.

When you enable Remove Prior Compensation for Rehires, Workday only displays assignments that a worker is eligible for within their position in the *Propose Compensation Hire* process, event details, and in the Compensation History and Worker History reports. Workday retains a worker's compensation history from their prior assignments and termination, but doesn't display it during the *Hire* process.

Once you enable the tenant setting, you must log out, then log back in to see the change.

Related Information
Examples
2025R2 Feature Release Note: Remove Prior Compensation for Rehires
Workday Community: Compensation: Compensation Hire and Rehire

FAQ: Propose Compensation

How do the Expected End Date and Actual End Date fields work?	For salary, hourly, or allowance plans, the Expected End Date is an estimate. Access the Schedule

Remove Compensation Plans with Expected End Date task to actually remove compensation plan assignments from employees.

For compensation plan assignments with an Actual End Date, Workday automatically removes the compensation plan assignment at 11:59:59 PM on that date. Workday doesn't remove plan assignments when there are future-dated events on the plan assignment.

Note: The Schedule Remove Compensation Plans with Expected End Date task ignores compensation plan assignments with an Actual End Date.

Workday displays the Actual End Date field only if you selected the Enable Actual End Date field in the Compensation section of the Edit Tenant Setup - HCM task.

How does proposing compensation affect the compensation basis total?	If you make changes to the individual plans of a compensation basis, Workday recalculates the proportional plans based on the modified plan for employees managed by basis total. However, Workday doesn't recalculate plans that are a percentage of total cash when individual plans change. On the *Hire* and *Change Job* business processes, managers can override the amount for employees managed by a compensation basis. Workday then performs a partial calculation and recalculates only those plans that depend on the change. In this case, the period salary plan functions as a percentage-based plan. If you want to have the period salary plan function as a percentage of salary only, modify the compensation basis to contain salary only. Run the Period Salary Plans Manage By Compensation Basis Health report to verify your configuration. With Fixed for Manage by Basis Total selected, Workday treats the assigned amount as fixed when performing a top-down calculation on the Primary Compensation Basis (PCB). This check box displays only when: • The compensation plan is part of the PCB. • The compensation plan is amount- or unit-based. • The compensation plan allows overrides.
What does the Enable Dynamic Display for Compensation Plan Sections tenant option do?	If this option is selected in the Compensation section of the Edit Tenant Setup - HCM task, Workday displays only relevant compensation plan sections during the *Propose Compensation Change* business process when used as a step on the *Change Job* business process, either for an internal job change or an internal hire.

Workday determines the relevant plan sections based on worker eligibility and the security permissions for the user performing the compensation change.

Note: If the user performing the compensation change has access to the *Select Any Compensation Package* domain, Workday displays all plan sections, regardless if this option is selected or cleared.

For users with View/Modify permissions on any of these following compensation security domains:

- *Compensation Change: Allowance*
- *Compensation Change: Bonus*
- *Compensation Change: Calculated*
- *Compensation Change: Commission*
- *Compensation Change: Hourly*
- *Compensation Change: Merit*
- *Compensation Change: Period Salary*
- *Compensation Change: Salary*
- *Compensation Change: Stock*
- *Compensation Change: Unit Salary*

Workday displays the respective plan section if the worker for whom the compensation change either:

- Has an assignment of that plan type, or
- Had an assignment of that plan type but has lost the assignment because of eligibility or manual removal of the assignment.

For users with View/Modify permissions on the above domains and Modify permissions on these security domains:

- *Add Compensation Plans: Add Allowance*
- *Add Compensation Plans: Add Bonus*
- *Add Compensation Plans: Add Calculated*
- *Add Compensation Plans: Add Commission*
- *Add Compensation Plans: Add Hourly*
- *Add Compensation Plans: Add Merit*
- *Add Compensation Plans: Add Period Salary*
- *Add Compensation Plans: Add Salary*
- *Add Compensation Plans: Add Stock*
- *Add Compensation Plans: Add Unit Salary*

Workday displays the respective plan section if the worker for whom the compensation change:

- Has an assignment of that plan type, or
- Had an assignment of that plan type but has lost the assignment because of eligibility or manual removal of the assignment, or
- Is eligible for that plan type.

Related Information

Tasks

Roll Out Compensation Plans to Employees on page 1027

FAQ: Compensation Defaulting

What is the difference between default compensation and compensation defaulting?

Default compensation refers to the compensation attributes configured on a position. Workday automatically populates fields when filling a position or a job from default compensation, if it's configured on the position. *Compensation defaulting* simply refers to how Workday populates compensation values.

Example: You've configured compensation for the Recruiter position but not for the Event Coordinator position. There's no offer or job requisition. When Glen hires Andrea for the Recruiter position using *Hire*, Workday automatically populates compensation from the position. When Glen hires Heather for the Event Coordinator position, Workday uses eligibility rules.

This table lists stand-alone business processes and the sources from which Workday automatically populates compensation values. For some business processes, Workday searches for compensation values in multiple sources sequentially and stops when it finds values.

Task or Business Process	Source of Compensation
Create Position and Edit Position	Eligibility rules. The *Change Default Compensation* subprocess of the *Create Position* process assigns compensation guidelines and plans to a position using eligibility rules. Workday assigns any changes made or additional compensation plans added

Task or Business Process	Source of Compensation
	during this subprocess to future staffing events.
Create Job Requisition	1. Position. 2. Eligibility rules. If you use Evergreen requisitions, Workday derives compensation values from the Evergreen requisition.
Edit Job Requisition	Eligibility rules. If you use Evergreen requisitions, Workday derives compensation values from the Evergreen requisition.
Offer and *Employment Agreement*	1. Default compensation configured on the job requisition. 2. Eligibility rules. 3. Both 1 and 2 if you configure the Run Eligibility Rules when there is Requisition Compensation prompt in the Compensation section on the Edit Tenant Setup - HCM task. If configured, Workday runs eligibility rules during the selected business processes even when default compensation exists on the job requisition. Note: Workday might populate the same compensation values regardless of the source. Example: Compensation values derived from the eligibility rules might be identical to those from the default compensation on the job requisition.

Task or Business Process	Source of Compensation
	Workday persists individual overrides from default compensation on the job requisition if the candidate is still eligible for the plan as of the hire date on the process. If *Offer* or *Employment Agreement* details, like location, change during a renegotiation, Workday runs eligibility rules even if default compensation exists on the job requisition. The *Offer* and *Employment Agreement* business processes don't use default compensation on position.
Hire	1. For rehires only, Workday uses compensation assignments in effect before termination. However, Workday clears the the Expected End Date and Actual End Date fields from compensation plan assignments. 2. *Offer*. 3. Job requisition. 4. Position. 5. Eligibility rules.
Change Job	1. *Offer*. 2. Job requisition. 3. Position, but only when default compensation is configured on the position and you're not using the *Change Job* Move option. When using the Move option to move a worker to a new position, Workday always uses eligibility rules even if default compensation is

Task or Business Process	Source of Compensation
	configured on the new position. 4. Eligibility rules.
Request Compensation Change	No defaulting.
Request Requisition Compensation Change	No defaulting when initiated as a stand-alone business process. When included as a subprocess, the parent business process determines how compensation defaults. Example: *Request Requisition Compensation Change* as subprocess of *Job Requisition*.

What's the advantage of using default compensation on a position?

So that every employee who hires into that position receives the same compensation values.

Default Compensation enables the establishment of compensation guidelines, plans, and plan amounts on a position. Examples:

- Position budgeting.
- Tracking default compensation as budgeted or approved compensation.
- Sending target or approved compensation to an external Applicant Tracking System.
- To aid in giving concise compensation guidance to those proposing compensation.

What's the advantage of using default compensation for requisition compensation?

So that every applicant hired using the same job requisition receives consistent compensation values.

When does Workday default a grade or grade profile configured on a job profile?

Depending on the business process, when a grade or grade profile doesn't exist on the offer, job requisition, or position, Workday determines if the job profile has a grade or grade profile. If so, Workday populates compensation values in this order:

1. Grade, regardless if the eligibility rule configured on the grade applies to the employee.
2. Grade profile, only when an eligibility rule configured on the grade profile applies to the employee.

Why doesn't Workday default compensation in the Request Compensation Change task?

The Request Compensation Change task is for:

	• Proposing a change to existing compensation for an employee, not to initially determine it. • A single-purpose compensation change. Workday doesn't run eligibility rules at initiation to populate plans in the Proposed column of the transaction. You can view the eligible plans when proposing compensation using the *By Compensation Package and Rule* or *By Compensation Rule* options.
What effect does a compensation package have on compensation defaulting?	Compensation packages group together grades, grade profiles, and compensation plans. If an employee is affected by an eligibility rule associated with a compensation package, the grades, grade profiles, and compensation plans associated with the compensation package determine compensation defaulting.
Why do rehired employees have ***current*** assignments?	To determine compensation for a rehired employee, Workday: 1. Reads compensation assignments in effect before the employee terminated and uses that for the initial compensation values on rehire. 2. Reads compensation values from the *Offer* business process in Workday Recruiting, if they exist. If not, Workday looks for default compensation if configured on the position. Finally, if the position doesn't have default compensation, Workday uses eligibility rules. You can configure your tenant to not reassign or display a previous employee's prior compensation when you rehire them. See Concept: Remove Prior Compensation for Rehires.
How does the Retain Basis Total option on the compensation basis affect the proposed total?	If you selected Retain Basis Total on the compensation basis, Workday populates the existing compensation basis total during the *Propose Compensation* step of the *Change Job* process. The primary compensation basis doesn't come from the job requisition. Workday then rebalances the plan assignments but keeps the compensation basis total fixed. If Retain Basis Total isn't selected, Workday recalculates the compensation basis total based on the changed plan assignments.
Does Workday apply compensation defaulting when Guidelines fields are changed manually?	By default, no. However, you can configure the Enable Defaulting Based on Changes to Guidelines on the Edit Tenant Setup - HCM task to enable compensation defaulting for 1 or more of these business processes: • *Add Additional Job (Propose Compensation Hire)* • *Change Job (Propose Compensation Change)* • *Employment Agreement (Propose Compensation Offer/Employment Agreement)*

- *Hire (Propose Compensation Hire)*
- *Job Requisition (Requisition Compensation)*
- *Job Requisition Change (Requisition Compensation)*
- *Offer (Propose Compensation Offer/Employment Agreement)*

Workday applies the compensation defaulting to compensation plan assignments on the business processes you select when you both:

- Base eligibility rules on Guidelines fields.
- Change any field in the Guidelines section that the eligibility rules are based on.

Related Information

Concepts

Setup Considerations: Compensation Eligibility Rules on page 982

Reference

FAQ: Employee Visibility Date on page 1191

Manage Compensation

Create Compensation Packages

Prerequisites

- Create compensation components and grades.
- Create 1 or more compensation plans to include in the compensation package.
- Security: *Set Up: Compensation Packages* domain in the Core Compensation functional area.

Context

Compensation packages group compensation guidelines and compensation plans. Example:

- Grades.
- Grade profiles.
- Steps associated with grade profiles.

A compensation package enables you to assign grades and plans to a worker simultaneously during a staffing transaction. During a staffing transaction, use eligibility rules to assign grades and plans to a worker simultaneously.

To have compensation components automatically populate for eligible employees during staffing transactions:

- Assign an eligibility rule to a compensation package.
- Associate the default grade and grade profile.
- Associate 1 or more plan with that package.

Steps

1. Access the Create Compensation Package task.
2. (Optional) Select one or more Eligibility Rules to establish who is eligible for this package.

   If you select multiple eligibility rules, Workday evaluates each rule independently. Employees are eligible if they meet the qualifications of any 1 rule.

3. Select the Compensation Grades to associate with this package.

   Accessible by Users Granted Segment is available only if segmented security for compensation is set up.
4. Select the Compensation Plans to associate with this package.

   For eligibility rules to work during staffing events, associate plans with packages.

   You can assign multiple salary plans to compensation package but each plan requires its own compensation rule.
5. (Optional) Select the Compensation Basis to associate with this package.

   This section is required for Workday to allocate awards to plans that make up an employee's compensation basis. You can use a total compensation amount to manage compensation review process awards or other compensation change events.

   You can only select compensation bases that have the Manage Basis Total check box selected.

Next Steps

- Use the Edit Compensation Package task to update the package.
- Assign packages to employees or update an employee's package:
  - As part of the hiring process (initial assignment only).
  - As part of the promote, demote, and transfer staffing transactions.
  - Using the Request Compensation Change task.

Related Information
Tasks
Steps: Set Up Compensation Grades and Grade Steps on page 988

Set Up Compensation Package Analytics

Prerequisites

Security: *Set Up: Compensation Packages* domain in the Core Compensation functional area.

Context

You can configure whether to display pay ranges, segments, guidelines, and pay range analytics on compensation-related reports and tasks, such as:

- Request Grade Change
- Request Compensation Change
- View Compensation
- Direct Report Compensation Summary

Examples:

- Select Display Total Base Pay Range and clear Display Position in Range to display the total base pay range and compa-ratio.
- Select Display Primary Compensation Basis Range and Display Position in Range and clear Display Compa-Ratio to display both the Primary Compensation Basis (PCB) range and the position in range.

Steps

Access the Edit Compensation Package Analytics task.

As you complete this task, consider:

Option	Description
Display All Segments for Total Base Pay Range Display All Segments for Primary Compensation Basis Range	If you select 1 or both, Workday displays all segments for the selected range. During compensation transactions, such as *Propose Compensation Change*, you can see all pay range segments, provided you have view access on 1 or both of these domains: • Worker Data: Compensation Basis Pay Range. • Worker Data: Compensation Pay Range
Display Midpoint	If selected, Workday displays the midpoint of the pay range on a worker's Compensation profile report, the Compensation > View Compensation task, and in the *Request Compensation Change* and *Propose Compensation* business processes. The compensation package must include the grades to display the midpoint.
Guidelines Warnings	Select the method for displaying guidelines warnings. A warning message displays for values above or below the pay range for the employee's total base pay or PCB.
Display Compa-Ratio Display Position in Range	If selected, Workday displays these fields in the Compensation > View Compensation task and in compensation change tasklets on these business processes: • *Add Additional Job* • *Change Job* • *Hire* • *Request Compensation Change* • *Start International Assignment*

Related Information
Tasks
Create Custom Labels
Reference
2023R2 What's New Post: Improving Compensation Experience in Job Changes for Managers

Restrict Viewing of Funded and Non-Funded Plan Assignments

Prerequisites

Security:

- *Set Up: Compensation Security Segments* domain in the System functional area.
- *Security Configuration* domain in the System functional area.

Context

You can create security segments that restrict specific compensation plan assignments to specific security groups.

Steps

1. Create the segments that define the plan types and plans to which you want to grant access.
    a) Access the Create Compensation Plan Assignment Security Segment task.
    b) Select 1 or more funded or non-funded plan types, and for each, 1 or more plans.

       The segment includes all individual plans associated with a plan type.
2. Create segment-based security groups that you want to associate with the plan assignment segments.
    a) Access the Create Security Group task.
    b) For Type of Tenanted Security Group, select *Segment-Based Security Group*.
    c) Select the Security Groups you want to have access to the segment.
    d) In the Access Rights field, select the segment you created.
3. Activate any of these domains: *Self Service: Funded Plan Assignments*, *Self-Service: Non-Funded Plan Assignments*, *Worker Data: Funded Plan Assignments*, and *Worker Data: Non-Funded Plan Assignments*.
    a) Access the View Domain task.
    b) Select the a Domain.
    c) From the related actions menu of Domain Security Policy, select Domain Security Policy > Enable.
    d) Select the Confirm check box.
    e) Repeat steps A - D for all the domains you want to activate.
    f) Access the Activate Pending Security Policy Changes task and confirm changes.
4. Add the segment-based security group to the domains you activated in the previous step.
    a) Access the View Domain task.
    b) Select the Domain.
    c) From the related actions menu of Domain Security Policy select Domain Security Policy > Edit Permissions.
    d) Add the segment-based security group to the applicable domain or business process security policies.
    e) Delete any role that displays in the list of security groups that is also part of the segment-based security group.
    f) Access the Activate Pending Security Policy Changes task and confirm changes.

Result

You can only see compensation plan assignments as defined by the security segments on:

- Event information
- Compensation history
- Worker history
- Worker profile
- View Plan Assignments
- View Plan Audits

Set Up Segmented Security by Compensation Plans

Prerequisites

- Analyze your organization's needs and decide whether segmented security for compensation is appropriate. Evaluate your current organizational structure and thoroughly understand segmented security requirements.

- Configure organizational hierarchies, security groups, and organizational roles.

  Note: The use of segmented security groups won't apply to every business; it involves a number of complex steps and impacts your overall compensation practice. Even if you currently use location hierarchies for other purposes, your current hierarchies might not be adequate for restricting access to compensation components. Also, intersection security, constrained job-based security groups, and rule-based security groups aren't supported for Compensation.
- Create location hierarchy organizations that parallel the segments you need.
- Security:
  - *Set Up: Compensation Security Segments* domain in the System functional area.
  - *Set Up: Tenant Setup - HCM* domain in the System functional area.
  - *Set Up: Assignable Roles* domain in the Organization and Roles functional area.
  - *Reports: Organization* domain in the Organization and Roles functional area.
  - *Security Configuration* domain in the System functional area.
  - *Worker Data: Non-Funded Plan Assignments* in the Core Compensation functional area.
  - *Self-Service: Non-Funded Plan Assignments* in the Core Compensation functional area.

Context

Segmented security groups divide access to Compensation setup data (such as Compensation Plans) among multiple Compensation Partners. Example: A business with sites in Canada, the U.S., and Mexico might require a separate Compensation Partner for each country with appropriate access to the setup data.

Note: Compensation Administrators need access to all compensation segments you create, no matter how you decide to segment your organization's compensation groups.

Steps

1. Enable the segmented security group feature for compensation.
   a) Access the Edit Tenant Setup - HCM task.
   b) In the Compensation section, select the Enable Compensation Setup Segment Security check box.
2. Enable the *Compensation Partner* role for the *Location Hierarchy* organization type.
   a) Access the Maintain Assignable Roles task.
   b) In the Enable for Organization Types column, add *Location Hierarchy* to any organization types already enabled.
3. In the applicable location hierarchy organization, assign the *Compensation Partner* role to the desired worker.
   a) Access the View Organization task.
   b) Open the applicable location hierarchy organization.
   c) From the related actions menu, select Roles > Assign Roles.
   d) In the Assign Roles section, select *Compensation Partner* as the Role, and select the desired Worker to whom the Role should be assigned.
4. Create an organization membership security group that includes the applicable location hierarchy.
   a) Access the Create Security Group task.
   b) For Type of Group, select *Organization Membership Security Group*.
   c) In the list of Organizations, add the desired location hierarchy to the security group.
   d) Specify whether the new organization membership security group Applies to Current Organization Only or Applies to Current Organization And All Subordinates.

5. Create an intersection security group that includes the applicable organization membership security group and the Compensation Partner security group.
    a) Access the Create Security Group task.
    b) For Type of Group, select *Intersection Security Group*.
    c) In the list of Security Groups, add the desired organization membership security group and the Compensation Partner security group.
6. Create a security segment for the desired compensation component, such as country.
    a) Access the Create Compensation Setup Security Segment task.
    b) Select the Pay Component (or set of components) to contain within the segment.
7. Create a segment-based security group that joins the applicable intersection security group with the applicable security segment. This is a critical step that ties together the preceding steps.
    a) Access the Create Security Group task.
    b) For Type of Group, select *Segment-Based Security Group*.
    c) In the list of Security Groups, add the applicable intersection security group.
    d) In the list of Access Rights, add the applicable security segments.
8. Repeat steps 3 through 7 for each secured compensation segment you want to create.
9. Create Segment-Based Security Groups.

    Create a segment-based security group for the Compensation Administrator that joins the Compensation Administrator with all the security segments created.
10. To use any new segment-based security group that you've created, update and activate the domain security policy and business process security policy for the Compensation functional area.
    a) Access the Functional Areas report.
    b) From the related actions menu for Core Compensation and Advanced Compensation, select Functional Area > View Business Process Policies (or View Domain Policies).
    c) Click Edit Permissions.
    d) Add the segment-based security group to the applicable domain security policy/business process security policy.
    e) Delete the *Compensation Partner* security group from the applicable domain security policy/ business process security policy.
    f) Access the Activate Pending Security Policy Changes task to confirm changes.

Next Steps

You can use the All Compensation Setup Security Segments report to review which intersection groups constrain the segment-based security groups for a particular compensation segment or component.

Related Information

Concepts

Concept: Security Groups

Tasks

Roll Out Compensation Plans to Employees on page 1027

Create Intersection Security Groups

Restrict Viewing of Funded and Non-Funded Plan Assignments on page 1046

Reference

Reference: Compensation Plan Comparisons on page 1064

Reference: Edit Tenant Setup - HCM

Concept: Out of Order Compensation Changes

You can process simultaneous compensation changes for the same worker using In Progress *Request Compensation Change* and *Change Job* as a sub-business process using an opt-in tenant configuration. You can also process multiple simultaneous In Progress *Request Compensation Change* events for the same worker. Processing simultaneous compensation changes makes ad-hoc pay adjustments simpler and streamlines compliance with policies and regulations.

Note: (U.S. federal) With respect to the OPM Simultaneous Pay Actions rule, Workday recommends running an In Progress *Request Compensation Change* event and an In Progress *Change Job* business process event together for pay changes taking effect on the same date. To maintain compliance with OPM rules and GPPA, all compensation change business processes need to be PAR certified prior to the event effective date.

To configure your tenant and opt-in:

1. Access Maintain Functionality for Staffing Transactions.
2. Filter by Business Process Type for Request Compensation Change.
3. Select a Functionality option.
4. Select an Enabled for security option.
5. Configure by Security Group. This field controls which users can:
    a. Initiate *Request Compensation Change* if a *Change Job* event is already In Progress.
    b. Initiate *Request Compensation Change* if a *Request Compensation Change* process is already In Progress.

Note: Since this functionality can lead to unexpected assignment values and reporting results, it's recommended that you configure your tenant setting to only allow trained Security Groups to initiate a simultaneous event.

When you opt-in, Workday disables the validation that blocks you from initiating a *Request Compensation Change* when either a *Change Job* as a sub-business process or another *Request Compensation Change* process is already In Progress. This tenant configuration disables validation on Request Compensation Change for initiating actions only. All subsequent Business Process steps will honor normal Business Process policies.

When you opt-in, Workday expects this tenant configuration to not introduce any change in behavior in the coordination of events during compensation review.

Considerations

Understand how Workday processes Compensation data before initiating a simultaneous compensation event:

- When a compensation event is initiated, Workday uses a worker's Current assignment values based on their most recently completed event to determine effective compensation.
- When multiple compensation events are In Progress, the assignment or plan values of those events will not refresh based on other simultaneously In Progress events.

When a compensation event is completed:

- Workday doesn't apply out of order data rolling to the plans or assignments of impacted future dated or completed events. When you modify, add, or remove a plan assignment in an event initiated second, the event initiated first will not reflect the updated plan assignment value after the second event completes.

When processing multiple In Progress compensation events with the same effective date:

- Workday processes the Proposed values of each event by completion moment. If you change the same plan for a worker in two In Progress compensation events, the assignment values from the event that completes last will be applied to the worker's effective compensation.

This processing can lead to unexpected results in Current event values and effective compensation assignments and reporting. To ensure that your simultaneous compensation changes reflect intended results and avoid overwrites, Workday recommends that you:

- Consider existing In Progress compensation events before you initiate a simultaneous compensation event.

- Check the effective date of plan assignments against other in progress events to ensure you are aware if assignment has been changed elsewhere.
- Complete events in the desired order to ensure the intended Proposed compensation values are assigned to the worker.
- Monitor In Progress events using the standard report Faceted Standard Report Find Events. Copy this report, apply the RDS In Progress Compensation Changes, 1435$515 and customize the output with the In Progress facet filter and Change Job and RCC BPTs. Group by position column. Intended Security Group(s) must have access to the report.

Related Information

Concepts

Concept: Coordination of Events During Compensation Reviews on page 1179

2025R1 Feature Release Note: Simultaneous Compensation Changes Using Request Compensation Change and Change Job with Compensation

2025R2 Feature Release Note: Simultaneous Compensation Changes Using Multiple In Progress Request Compensation Change Processes

Maintain Compensation Change Templates

Prerequisites

- Access the Maintain Change Job Templates task and select the Enable Enhanced UI for this Template. See: Set Up Change Job Templates on page 849
- Add *Propose Compensation Change* as a step on the *Change Job* business process. See: Steps: Set Up Job Changes on page 844
- Add *Propose Compensation Hire* as a step on the *Hire* business process.
- Security: *Set Up: Compensation Change Templates* in the Core Compensation functional area.

Context

You can create templates for the *Propose Compensation Change* or *Propose Compensation Hire* business processes when they're included as a subprocess of *Change Job* or *Hire*, respectively. These templates determine how sections and fields are displayed in the *Propose Compensation Change* or *Propose Compensation Hire* subprocesses.

Each template applies only to the initiation step of the *Propose Compensation Change* and *Propose Compensation Hire* subprocess, not to the review and approve steps. You can configure up to 100 compensation change templates.

Steps

Access the Maintain Compensation Change Templates task.

To create a new template, select the Add + button. Otherwise, select an existing template to modify.

As you complete this task, consider:

Option	Description
Make This Template Inactive	Workday won't display an inactive template even if it's part of an in-progress compensation change event.
Select Security Groups	(Optional) Select 1 or more security groups to which the template applies. If you don't select at least 1 security group, the template applies to anyone that initiates a *Change Job* or *Hire* process that's associated with the specified Reason.
Enable for Business Process Type	Specify the business process type to which the template applies.

Option	Description
	You can specify only 1 business process type per template.
Reasons for *business process type*	Specify 1 or more reasons for the template. This field associates the compensation change template to the *Change Job* or *Hire* process, depending on what business process type you select. To associate this template with the *Change Job* process, select this template's associated *Reason* on the Select Reason for Template field on the Maintain Change Job Templates task. See: Set Up Change Job Templates on page 849 To associate this template with the *Hire* process, select this template's associated *Reason* within the *Hire* process. Each reason can apply to only 1 active template and can't be shared across templates.
Select Sections for Template	Select 1 or more sections and configure 1 or more fields to display for each section. Each section and field you select displays during the respective *Propose Compensation Change* or *Propose Compensation Hire* subprocess.

Example

You create a compensation change template with this configuration:

Template Name	Base Pay Salary + Allowance
Select Security Groups	Left blank, so that the template applies to anyone that initiates a*Change Job* process that's associated with the specified reason.
Enable for Business Process Type	Change Job (Propose Compensation Change)
Reasons for Change Job	Change Job Details. The *Change Job* business process must also have the Select Select Reason for Template field set to Change Job Details on the Maintain Change Job Templates task.
Select Sections for Template	• Salary • Total Base Pay
Total Base Pay Fields to Display	Total Base Pay - Total Base Pay Detail
Salary Fields to Display	• Salary - Amount • Salary - Currency • Salary - Frequency

Next Steps
Access the View Compensation Change Template report.

Set Up Task Consolidation for Compensation in Recruiting

Prerequisites

- Set up consolidated tasks.

- Select the Consolidate Tasks check box on the business process security policy on these business processes:
  - *Offer*
  - *Employment Agreement*

Context

You can consolidate offer and employment agreement tasks into a single workbook using Worksheets, saving you time and submitting multiple tasks at once.

The *Offer* and *Employment Agreement* business processes in Workday Recruiting can include these Compensation subprocesses:

- *Propose Compensation Offer/Employment Agreement*
- *Request One-Time Payment Offer/Employment Agreement*
- *Request Stock Grant Offer/Employment Agreement*

Note: Consolidated Task functionality doesn't support all the fields available in a non-consolidated workflow and doesn't support Manage by Basis Total.

Steps

1. Configure Modify access on these domains in the Core Compensation functional area:
   - Add Compensation Plans: Add Allowance.
   - Add Compensation Plans: Add Calculated.
   - Add Compensation Plans: Add Commission.
   - Add Compensation Plans: Add Hourly.
   - Add Compensation Plans: Add Period Salary.
   - Add Compensation Plans: Add Salary.
   - Add Compensation Plans: Add Unit Salary
   - Compensation Change: Guidelines.
2. Configure Modify access on these domains in the Advanced Compensation functional area:
   - Add Compensation Plans: Add Bonus.
   - Add Compensation Plans: Add Merit.
   - Add Compensation Plans: Add Stock.
3. Configure View access on these domains in the Core Compensation functional area:
   - Compensation Change: Manage Compensation Basis.
   - Compensation Change: Total Base Pay.

Related Information
Tasks

Steps: Set Up Offers on page 489

Steps: Set Up Employment Agreements on page 635

Steps: Set Up Task Consolidation for Offers on page 493

Steps: Analyze Pay Equity

Context

You can analyze and report on pay equity for these areas: ethnicity, age group, and gender. You can set up either or both:

Pay Equity Discovery Board	The Pay Equity Discovery Board combines data from Staffing, Talent and Performance, and Compensation. It provides a starting point for your pay equity analysis. The discovery board consists of 2 sheets, each with several visualizations: • Current Worker Data: Visualizations use the Workers for HCM Reporting indexed data source. • Compensation Events: Visualizations use the Completed Employee Compensation Events for HCM Reporting indexed data source.
Pay Equity Dashboard	Enables you to monitor and report on potential gender pay and equity issues.

Steps

1. (Optional) Set up the Pay Equity Discovery Board.
    a) Access the Delivered Discovery Board task.
    b) Select Pay Equity, select Make a Copy, and save it in your Drive.
    c) Open your copied discovery board and select filters.

       As a best practice, Workday recommends that you select filters that limit the number of employees analyzed to less than 10,000.

   Workday updates indexed data sources and fields every hour.

   Security:

    - *Discovery Boards: Administration* in the System functional area.
    - *Discovery Boards: Create* in the System functional area.
    - *Discovery Boards: Manage Delivered Discovery Boards* in the System functional area.
    - *Worker Data: Compensation by Organization* in the Core Compensation functional area.
2. (Optional) Set up the Pay Equity Dashboard.
    a) Select the Enable Worker Trending check box on the Edit Tenant Setup - Reporting and Analytics task.
    b) Set up a security group that is unconstrained and has access to these domains:

        - *Pay Equity Dashboard* in the Core Compensation functional area.

          Workday recommends that you consult with your legal team about access to sensitive pay equity data before adding any security groups to the *Pay Equity Dashboard* domain.
        - *Person Data: Gender* in the Personal Data functional area.
        - *Trended Worker Data* in the Staffing functional area.
        - *Worker Data: Compensation by Organization* in the Core Compensation functional area.
        - *Worker Data: Current Staffing Information* in the Staffing functional area.
        - *Worker Data: Performance Reviews* in the Performance Enablement functional area.
        - *Worker Data: Public Worker Reports* in the Staffing functional area.

       Workday delivers the dashboard empty.
    c) Workday recommends that you add these reports to the dashboard, configured as worklets:

        - Average Compa-Ratio by Country & Gender
        - Average Compa-Ratio by Gender
        - Average Compa-Ratio by Job Family Group & Gender
        - U.S. Average Base Pay by Performance Rating & Gender

       You can also run these reports individually or use them to create custom reports.

Related Information

Concepts

Concept: Dashboards

Concept: Discovery Board Workspace
Concept: Discovery Board Security
Concept: The Discovery Board Workflow
Tasks
Configure Dashboard Content
Steps: Set Up Tenant for Discovery Boards
Copy Workday-Delivered Discovery Boards
Reference
Reference: Edit Tenant Setup - Reporting and Analytics

Configure Scramble Plans for Compensation

Prerequisites

- Review Concept: Data Scrambling.
- Security: *Scrambler Administration* domain in the System functional area.

Context

You can scramble or remove compensation data in Implementation tenants for training and testing purposes, or to cloak sensitive information.

Note: Scrambling permanently changes or removes data. Scramble data in Implementation tenants only.

When you submit more than 1 scramble field at a time, Workday removes data before scrambling. Example: When you configure both the Removal of Compensation Assignments and Payments and Allowance Plans scramble fields, Workday removes plan assignments, leaving no allowance plan assignments to scramble.

Note: Workday doesn't scramble plan defaults that equal zero.

Steps

1. Access the Create Data Scramble Plan task.
2. As you complete the Compensation section, consider these scramble fields and scramble methods:

Option	Description

Allowance Plans
Bonus Plans
Commission Plans
Merit Plans
One-Time Payment Plans
Stock Plans
	Select:
	• Any option beginning with Input Value, Increment Profiles, and Update.
	For each plan type, select a scramble method and enter values for Amount, Percent, or the Number of Units and Per Unit Amount.
	Workday scrambles:
	  • Amount-based plan defaults, assignments, and payments to the value specified for Amount. For commission plans, Workday scrambles both the amount and the draw amount.
	  • Percent-based plan defaults and assignments to the value specified for Percent.
	  • Unit-based plan defaults and assignments to the values specified for Number of Units and Per Unit Amount.

Option	Description
	• Set to Plan or Plan Profile Default Workday: • Overrides compensation assignments and payments with individual targets. • Sets the plan or plan profile default to plan assignments, payments, and any grants. For commission plans, Workday scrambles both the amount and the draw amount. Workday assigns the new scrambled default or profile default value to those employees that don't have individual targets on their plan, depending on their eligibility.
Compensation Elements Compensation Grades, Grade Profiles, and Grade Hierarchies Compensation Packages Compensation Plans	For both methods, Workday generates a generic name for each object and appends a dash and the next number in sequence. Example: *General Salary Plan* renamed to *Salary Plan - 1*. Select: • Scramble to Number Sequence (Names and Descriptions) • Scramble to Number Sequence (Names, Descriptions, and Reference IDs) Workday also renames all object Reference IDs to match the name of the scrambled object.
Compensation Pay Ranges	Select: Input Percentage Variance and enter the percentages to decrease the minimum and increase the maximum. Workday: • Selects random values according to your input percentage variance settings for the minimum and the maximum. • Recalculates the segments in between evenly. Workday recalculates segments the same as the Calculate Segments check box on the Create Compensation Grade task.
Removal of Compensation Assignments and Payments	Remove all guidelines, plan assignments, and payments. Or, remove selected plan assignments and payments, but not guidelines. • Remove All Guidelines, Plan Assignments, and Payments • Remove Selected Plan Assignments and Payments
Removal of Compensation Review Data	Workday removes all compensation review: • Plan assignments. • Employee or organization-specific award data. • Scorecards and profiles. • Organization / budget pool contributions. • Statements.
Salary and Hourly Plans	Select:

Option	Description

	• Input Percentage Threshold for Salary and Hourly Assignments
	Workday scrambles all salary and hourly plan assignment values to a random value between the minimum and your specified threshold percentage of the total base pay range.
	Example: The total base pay range for an hourly plan is 10 through 20. You want to scramble that to a random point between the minimum (10) and 50% of the range (15), so you enter 50 for the threshold percentage. Workday scrambles the hourly plan assignment to 12, which is a random point between the minimum of 10 and the threshold percentage of 15.
	• Input Value and Update Assignments
	Enter values for hourly plan defaults, hourly assignments, and salary assignments.
	Workday:
	  • Sets hourly plan defaults and assignments to the value you specify for Hourly Assignments.
	  • Sets salary assignments to the value you specify for Salary Assignments.

Related Information

Concepts

Concept: Data Scrambling

Setup Considerations: Data Scrambling

Tasks

Steps: Scramble Tenant Data

Create Compensation Grades on page 989

Examples

Example: Compensation Pay Ranges Scramble Field on page 1057

Example: Compensation Pay Ranges Scramble Field

Context

You want to scramble compensation pay ranges on your Implementation tenant.

Steps

1. Select the Compensation Pay Ranges scramble field.
2. Select the *Input Percentage Variance* scramble method.
3. Enter 10 for Variable % Decrease for Minimum.
4. Enter 5 for the Variable % Increase for Maximum.

Result

For an employee with a Pay Range Minimum of 50,000 and a Pay Range Maximum of 150,000, Workday:

- Scrambles to random values according to your input variance percentage settings for the pay range minimum and maximum.

- Recalculates the segments in between evenly.

Pay Range Minimum	Because you entered 10 for the Variable % Decrease for Minimum, Workday scrambles (decreases) to a random value from 1 through 10 percent, from 45,000 through 50,000. In this example, Workday randomly selects 6.4%: 50,000 - (50,000 * 0.064) = 46,800.
Pay Range Maximum	Because you entered 5 for the Variable % Increase for Maximum, Workday scrambles (increases) to a random value from 1 through 5 percent, from 150,000 through 157,500. In this example, Workday randomly selects 2.2%: 150,000 + (150,000 * 0.022) = 153,300.
Pay range segments.	Workday recalculates segments evenly, exactly as if you selected the Calculate Segments check box on the Create Compensation Grade task: • Minimum = 46,800. • Segment 1 Top = 82,300. • Segment 2 Top = 117,800. • Maximum (or Segment 3 Top) = 153,300. • Midpoint = 100,050.

Reference: Full Time Equivalent in Compensation

Workday provides these Full Time Equivalent (FTE) settings that affect calculations:

Option	Configuration	Description
Use 100% FTE for Pay Range Comparisons	Edit Tenant Setup - HCM > Compensation	If selected, Workday divides part-time employee by the FTE % before comparing it to the range midpoint, minimum, maximum and segments when calculating: • Compa-Ratio • Position in Range • Pay Range Segment If one of the compensation plans assigned to an employee has the Use Assigned Value in 100% Calculations option selected, Workday uses the assigned plan amount instead of dividing the assigned amount by the FTE %. See ../../../manage-workday/tenant-configuration/tenant-setup/dan1370797339945.dita
Paid FTE	Staffing section on Maintain Localization Settings	If selected, Workday uses the paid FTE override on the position to prorate compensation plans or calculate 100% FTE plan values. See Concept: Working Time on page 552
Apply FTE%	When creating or editing: • Allowance plans.	If selected on a compensation plan, Workday prorates the plan assignment amount for part-time employees based on their FTE.

Option	Configuration	Description
	• Unit-based Allowance Plans. • Amount-based Bonus plans. • Salary plans.	When Paid FTE is enabled, Workday prorates using the paid FTE override on the position. Otherwise, Workday calculates FTE by dividing Scheduled Weekly Hours by Default Weekly Hours when proposing compensation during these business processes: • *Add Job* • *Change Job* • *Edit Position* • *Employment Agreement* • *Hire* • *Offer* • *Start International Assignment* See Create Salary Plans on page 1069
Use Assigned Value in 100% Calculations	When creating or editing: • Amount-based Allowance plans. • Unit-based Allowance Plans. • Amount-based Bonus plans. • Salary plans.	If selected, Workday uses the assigned amount on the plan as the fixed proration value and the 100% value in calculations. When the check box is cleared, Workday divides the assigned amount by the employee's FTE for 100% FTE calculations. Example: You assign a worker with 50% FTE amount-based Bonus Plan A for 1,000 and amount-based Allowance Plan B for 1,000. You select the Use Assigned Value in 100% Calculations for Bonus Plan A and None of the above for Allowance Plan B. The 100% FTE value calculated for Bonus Plan A is the assigned amount of 1,000. Workday doesn't divide this amount by the worker's FTE. The 100% FTE value calculated for Allowance Plan B is 2,000, which equals the assigned amount (1000) divided by the employee's 50% FTE (0.5): (1000/0.5 = 2000). Workday doesn't apply this option to workers Managed by Basis Total or to calculated plans that reference plans with this option selected. See Create Bonus Plans on page 1094
FTE Changes in Period	On the Create Time Proration Rule task.	If selected, Workday creates a proration segment for each event that can change the FTE% during the compensation review process period. For percent-based bonus plans, Workday applies the FTE% to the basis to determine the merit or bonus target. For amount-based bonus plans, Workday applies the FTE% to the target award amount the employee is eligible for. Example: You configure an amount-based bonus plan with an FTE time proration rule. Ben has an FTE change during the process period of the compensation review. Workday calculates proration segments based on Ben's FTE changes.

Option	Configuration	Description
		See Create Time Proration Rules for Compensation Reviews on page 1162

Related Information
Reference
2023R2 What's New Post: Flexibility in 100% Assigned FTE

Reference: Benefits and Pay Hub

The Benefits and Pay hub provides a single location for employees to review and maintain their benefits, compensation, payroll information. Employees can also access related reports.

Security:

- *Self-Service: Benefits and Pay Hub*
- *Self-Service: Compensation History*

Note: Workday controls the visibility of any control or report in the Benefits and Pay hub by the security of the related action, report, or business process. Examples:

- Employees in a security group with access to the *Self-Service: Benefits (My Tax Documents) - USA* security domain can view and print their ACA forms.
- Employees can see the Change Retirement Savings option if you modify the business process policy for the *Change Retirement Savings* business process.

Use the Maintain Hubs task to configure the Benefits and Pay hub to display on custom dashboards. See Configure Dashboard Content. You might notice differences in visibility between tenants, such as Preview and Sandbox, if you don't migrate or set up your configuration consistently.

Worklet	Description	Additional Information
Overview	Provides a current view of an employee's benefit, pay, and compensation with links to detailed reports. Employees can view and modify payment and withholding elections, initiate benefit changes, and view arrears balances and tax documents. A Needs Attention section displays if the worker has an active benefit event for either open enrollment or life events.	
Benefits	Enables employees to: • View their current benefit elections. • View expanded details for a benefit plan from the Benefit Elections page. • View their benefits as of a specified date. • Change their benefits elections.	• Steps: Set Up Employee Benefit Plans on page 1288 • Manage Dependents and Beneficiaries on page 1500

Worklet	Description	Additional Information
	• Change their retirement savings elections and contributions. • View their dependents. • View and edit their beneficiaries. • View and print their ACA forms.	
Pay	Enables employees to: • Access all their available payslips and tax documents. • Access the Most Recent Pay card to review gross and net pay on their most recent payslips. • Access the Deduction card to review deductions on their most recent payslips. • Access the Accounts section where they can view, add, or update their accounts for receiving pay. • Access links to useful payroll reports, dashboards, and tasks. • Add new or edit existing withholding elections for workers in Canada and the U.S. using the Federal, State, Local, and Provincial Withholdings buttons. Note: Workday doesn't support some withholding features, such as federal, state, and local withholding forms or multiple worksite reporting, for workers on international assignment, either in the U.S. or elsewhere. • Review and add voluntary deductions. • Review flexible payments and deductions requests. • Review arrears balances and payments.	• Steps: Set Up Payroll Processing • Steps: Create Earnings • Steps: Create Deductions • Define Payslips • Concept: Additional Payroll Data

Worklet	Description	Additional Information
	• Switch positions if they're in Canada or the U.S. and have multiple jobs. • View and update payment, tax, and tax form printing elections. • View their additional payroll data when they belong to a third-party pay group and you have configure the Additional Payroll Data feature.	
Compensation	Enables employees to: • View their bonus and one-time payment history. • Request a one-time payment for themselves (self-service), if configured. • View their compensation review statements. • View their total rewards. • View their compensation history (self-service, if configured) and a summary of each position for which they receive compensation. • View their current or upcoming period activity pay. • View their stock grants.	• Steps: Set Up and Manage One-Time Payments on page 1124 • Steps: Enable Self-Service One-Time Payments on page 1131

Related Information

Tasks

Set Up Hubs

Reference

2025R1 Feature Release Note: Benefits and Pay Hub Enhancements

2022R2 What's New Post: Benefits and Pay Hub

Reference: Out of Order Changes and Effective Dating

Workday uses the most recent Effective Date when processing out of order changes to:

- Allowance plans.
- Commission plans.
- Grades.
- Grade profiles.
- Hourly plans.
- Period salary plans.
- Salary plans.

- Steps.
- Unit salary plans.

When you create or edit compensation plans or guidelines, you must set future effective dates. Over time, you might make several edits to the same plan or guideline, and on each occasion set a different effective date.

Note: Workday doesn't require that effective dates be in chronological order. Workday applies your changes based only on the effective date, not the date you make the edits.

You can edit a plan on Monday with an effective date 1 year into the future. You can then edit the same plan on Tuesday with an effective date of Wednesday, only 1 day into the future. These edits are out of order because the second edit takes effect a year before the first.

Consider developing policies and procedures for managing changes to your compensation plans and guidelines.

You change the name and description of a salary plan, then select Exclude from Merit.

Edit Order	Effective Date	Action	Result
1	2000-01-01	You create the plan.	The plan becomes effective 2000-01-01.
2	2021-12-01	You change the plan name and description.	Plan name and description edits become effective 2021-12-01.
3	2010-05-01	You select the Exclude from Merit check box.	Because the effective date of this edit falls before and out of order with the second edit, it applies from 2010-05-01 through 2021-11-30. The entire plan configuration resulting from the second edit, effective on 2021-12-01, overwrites the third edit and clears the Exclude from Merit check box. To enable Exclude from Merit, you must edit the salary plan a fourth time and set the effective date after 2021-12-01.

You make edits to a compensation grade and add new grade profiles.

Edit Order	Effective Date	Action	Result
1	2000-01-01	You create a compensation grade with these profiles: USA, CAN, and MEX.	The compensation grade has 3 profiles from 2000-01-01 through 2021-09-30: USA, CAN, MEX.
2	2022-02-01	You update the compensation grade and add these new profiles: JPN and KOR.	The compensation grade has 5 profiles from 2022-02-01 to the present: USA, CAN, MEX, JPN, KOR. Because the entire grade configuration resulting from the second edit has the latest effective date, Workday overwrites the third edit with a previous effective date of 2021-10-01.

Edit Order	Effective Date	Action	Result
3	2021-10-01	You update the compensation grade and add a new profile: FRA.	This change is out of order to the second edit, which is effective 2022-02-01. The compensation grade has 4 profiles from 2021-10-01 through 2022-01-31: USA, CAN, MEX, FRA. Because this edit has an earlier effective date than the second edit, Workday overwrites the FRA profile on 2022-02-01.

You make edits to the compensation steps for a compensation grade on the Maintain Compensation Steps task.

Edit Order	Effective Date	Action	Result
1	2000-01-01	You create compensation step AAA.	The compensation grade has 3 profiles from 2000-01-01 through 2021-09-30: USA, CAN, MEX.
2	2022-02-01	You edit the Interval for compensation step AAA.	This edit overwrites the progression rule added with the out of order third edit on compensation step AAA.
3	2018-03-01	You add a progression rule for compensation step AAA You create compensation step BBB.	The progression rule for step AAA applied from 2018-03-01 through 2022-01-31. The compensation step BBB applies from 2018-03-01 to the present. The edit made effective 2022-02-01 applies only to compensation step AAA, not the grade.

Reference: Compensation Plan Comparisons

This chart describes the differences between the various types of Workday compensation plans to help you determine which plan type to use.

Plan Type	When do I use this plan type?	How do I assign employees to the plan?	How do the employees get paid?	What is the result?
Salary	Use to associate eligible salaried employees with the appropriate base salary compensation elements.	• As part of the Hire transaction. • As part of another staffing transaction (promote, demote, transfer). • As a result of using the Request	Workday automatically feeds the compensation to payroll for the regular pay period payment.	Workday pays employees the indicated amount.

Plan Type	When do I use this plan type?	How do I assign employees to the plan?	How do the employees get paid?	What is the result?
		Compensation Change task.		
Hourly	Use to associate eligible hourly employees with an hourly rate amount.	• As part of the Hire transaction. • As a result of using the Request Compensation Change task. • As part of another staffing transaction (promote, demote, transfer).	Workday sends the compensation and actual hours to payroll for the regular pay period.	Workday uses the indicated hourly amount to calculate how much to pay employees in their regular pay checks.
*Merit	Use to group employees (using eligibility rules) who are going to get a change to their base pay, and optionally, a promotion or additional adjustments. You can also add bonus and stock components to merit plans. If you want to give 1 person a raise, use the Request Compensation Change task.	• As part of the Hire transaction. • As part of another staffing transaction (promote, demote, transfer). • Through the Rollout Compensation Plans to Employees task. • As a result of using the Request Compensation Change task.	You can create a specific merit plan, which generates a request for each person in the plan to get a base pay change. A change to the base pay amount automatically flows to payroll.	Simply being in a merit plan doesn't affect pay. Workday changes the employee's compensation based on approved changes made during the compensation review process..
*Bonus	Use to group people together who are all going to get a bonus payment at the same time.	• As part of the Hire transaction. • As part of another staffing transaction (promote, demote, transfer). • Through the Rollout Compensation Plans to Employees task. • As a result of using the Request	A compensation review process with bonus awards generates a request for each person enrolled in the plan to get a portion of the bonus pool. The manager or administrator then determines the amount for each person and whether to pay the target amount	Simply being in a bonus plan doesn't affect pay. At the end of the compensation review process, Workday passes the bonus amount or tranche to payroll.

Plan Type	When do I use this plan type?	How do I assign employees to the plan?	How do the employees get paid?	What is the result?
		Compensation Change task.	in 1 payment or in predefined installments (tranches). You can also load these amounts using the EIB. The approved bonuses automatically flow to payroll.	
*One-Time	Use to give an employee a payment for something such as an incentive bonus.	Workday doesn't assign the plan type to the employee but makes it available for assignment.	Request and complete a one-time payment transaction, which automatically flows to payroll for payment.	The result is a payment amount flowing to payroll.
*Period Salary Plan	Use to give an employee extra months, weeks, or days of pay.	• As part of the Hire transaction. • As part of another staffing transaction (promote, demote, transfer). • As a result of using the Request Compensation Change task.	Workday sends the amount specified in the period salary plan to payroll for inclusion with regular pay.	Workday sends the payment amount to payroll.
*Commission	Use to store the target amount for commission.	• As part of the Hire transaction. • As part of another staffing transaction (promote, demote, transfer). • Through the Rollout Compensation Plans to Employees task. • As a result of using the Request Compensation Change task.	Workday doesn't pay out commission plans. You can integrate with a third-party sales incentive management application to pay the commissions appropriately.	This type of plan stores a target amount for assigned employees.

Plan Type	When do I use this plan type?	How do I assign employees to the plan?	How do the employees get paid?	What is the result?
Allowance	Use for compensation paid on a regular basis, such as a monthly cell phone allowance. Allowance plans can also be reimbursable as an expense item paid through the expense process, not Payroll.	• As part of the Hire transaction. • As part of another staffing transaction (promote, demote, transfer). • Through the Rollout Compensation Plans to Employees task. • As a result of using the Request Compensation Change task.	The amount specified in the allowance plan automatically flows to Payroll for inclusion with the employee's regular pay, unless Reimbursable is selected. Reimbursable allowance plans are expense items and don't flow through Payroll.	The result is an additional amount paid to an employee with their regular pay, unless the plan is Reimbursable.
*Stock	Use to group people together who are all going to get a stock grant at the same time.	• As part of the Hire transaction. • As part of another staffing transaction (promote, demote, transfer). • Through the Rollout Compensation Plans to Employees task. • As a result of using the Request Compensation Change task.	Workday doesn't pay out stock plans. You can integrate with a third-party stock administration application to handle vesting and other stock administration needs.	The stock grants based on this type of plan store stock grant details for employees.
*Future Payment Plan	Use alone or consider targets from other bonus or one-time payment plans to pay an employee a target amount. Enables administrator to true up any remaining balance in a final payment at the end of the period.	Administrators can assign an employee to the plan using the Assign Future Payment Plans task.	Administrators can launch a future payment plan, which generates a request for each person enrolled in the plan to get a portion of the bonus pool. The administrator then determines the amount for each person. The approved bonuses	Simply being in a future payment plan doesn't affect pay. To participate in a future payment plan, assign an employee to the plan and to any other bonus plans relevant for calculating the true up.

Plan Type	When do I use this plan type?	How do I assign employees to the plan?	How do the employees get paid?	What is the result?
			automatically flow to payroll.	

**These compensation plans are discretionary. Employees aren't paid from discretionary compensation plans in every pay period.*

To view:

- All compensation-related reports, run Workday Standard Reports. Select the *Compensation* and *Set Up Compensation* categories.
- A complete list of your compensation plans, access the Compensation Plans report.
- Employees assigned to various compensation plans, access the View Compensation Plan Rollout Process report or the Compensation Component Assignments report.
- All the employees in any compensation plan, run the Compensation Plan Assignments report.
- Employees assigned a specific plan, except future payment plans or one-time payment plans, select [plan type] > [plan type] Assignments from the related actions menu of the plan. Example: Merit Plan > Merit Plan Assignments.

Related Information
Tasks
Roll Out Compensation Plans to Employees on page 1027

Salary Plans

Steps: Set Up Salary Plans

Prerequisites

Set up compensation components and grades.

Steps

1. Create Salary Plans on page 1069.
2. Create Unit Salary Plans on page 1071.
3. Create Period Salary Plans on page 1072.

   Create a plan that enables you to assign extra months, weeks, or days of pay to employees.
4. (Optional) Create Compensation Rounding Rules.

   You can associate rounding rules with allowance, salary, merit, bonus, or stock plans, or with compensation bases managed by a compensation basis total.

   Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Next Steps

You can:

- Assign the salary plan to a compensation package.
- Assign the salary plan to new hires.
- Assign the salary plan to promoted, demoted, and transferred employees.

Related Information

Tasks

Roll Out Compensation Plans to Employees on page 1027

Create Salary Plans

Prerequisites

- Set up compensation components and grades.
- Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.

Context

Create a salary plan that you can then assign to eligible employees.

Steps

1. Access the Create Salary Plan task.
2. In the Details section, select the Inactive check box if you don't want the plan available for use with new processes. Processes already in progress using this plan complete as normal.
3. In the FTE section, consider

Option	Description
Apply FTE%	If selected, Workday prorates the bonus for part-time employees assigned to this plan based on their FTE. You can enable Paid FTE in the Staffing section on the Maintain Localization Settings task. If enabled, Workday prorates using the paid FTE override on the position. Otherwise, Workday calculates FTE by dividing Scheduled Weekly Hours / Default Weekly Hours when proposing compensation during these business processes: • *Offer*. • *Employment Agreement*. • *Hire*. • *Change Job*. • *Edit Position*. • *Add Job*. • *Start International Assignment*.
Use Assigned Value in 100% Calculations	For amount-based plans only. This option doesn't apply to workers Managed by Basis Total (MBT). If selected, Workday uses the assigned amount on the plan as the fixed proration value and the 100% value in calculations. If not selected, Workday divides the assigned amount by the employee's FTE for 100% FTE calculations. Example: You assign a worker with 50% FTE amount-based Salary Plan A for 1,000 and amount-based Allowance Plan B for 1,000. You select the Use Assigned Value in 100% Calculations for Salary Plan A and None of the above for Allowance Plan B. The 100% FTE value calculated for Salary Plan A is the assigned amount of 1,000. Workday doesn't divide this amount by the worker's FTE. The 100% FTE value calculated for Allowance Plan

Option	Description
	B is 2,000, which equals the assigned amount (1000) divided by the employee's 50% FTE (0.5): (1000/0.5 = 2000).
None of the Above	Workday doesn't apply FTE% and doesn't use the assigned plan value in 100% calculations.
Rounding Rule	Displays only when you've selected Apply FTE% and the worker's FTE% is less than 100%. For MBT workers with prorated compensation, Workday ignores any rounding rule on the salary plan. In addition, Workday doesn't round the salary amount for any Compensation business process that doesn't have an associated Pay Group. Workday calculatesSalary Assignment from the worker's Pay Group Frequency for the position being evaluated, rounds, and converts the value to Plan Frequency.

4. In the Salary Defaults section, select a Compensation Element.

   Compensation elements store the earnings associated with compensation. If you select a compensation element designated as base pay, Workday includes the compensation in the employee's base pay calculation.
5. In the Plan Eligibility section, select 1 or more eligibility rules.

   Eligibility rules determine which employees are eligible for this plan. If you select multiple eligibility rules, Workday evaluates each rule independently to determine employee eligibility for the plan. Employees are eligible if they meet the qualifications of any 1 rule. You can only use individual rules once in the plan and profiles.
6. Select the Exclude from Merit check box if you don't want this plan to be available when you initiate a compensation review process.

Next Steps

You can:

- Assign the plan to employees on the Request Compensation Change task or web service.
- Add the plan to a compensation package on the Create Compensation Package task.
- Access the Salary Plan report for detailed information on a specific plan.
- Access the Edit Salary Plan task.

  You can update default values only for plans not yet assigned to employees. You can, however, update the Compensation Element field regardless if the plan is assigned or not.
- Hide the compensation plan type from specified groups of workers using the *Worker Data: Compensation Plan Type* domain in the Core Compensation functional area.

Related Information

Tasks

Steps: Set Up Salary Plans on page 1068

Create Time Proration Rules for Compensation Reviews on page 1162

Steps: Set Up Proration

Steps: Propose Compensation for Employees or Positions on page 1032

Reference

Reference: Full Time Equivalent in Compensation on page 1058

Examples

Example: Time-Based Proration for Merit and Bonus Awards on page 1184

Create Unit Salary Plans

Prerequisites

- Set up compensation components and grades.
- Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.

Context

Create a unit salary plan that you can then assign to eligible employees.

Steps

1. Access the Create Unit Salary Plan task.
2. In the Salary Defaults section, consider:

Option	Description
Compensation Element	Compensation elements store the earnings associated with compensation. If you select a compensation element designated as base pay, Workday includes the plan's compensation in the employee's base pay calculation.
Unit	Select the unit for measuring the work performed.
Per Unit Amount	Enter the amount paid for each unit of work performed.
Default Units	Enter the number of units an employee is expected to work for the specified time period. Units multiplied by per unit amount determine an employee's pay. This is only used as a guideline and can be overridden. If you select a compensation element designated as base pay, then Workday includes the plan's compensation in the employee's base pay calculation.
Frequency	Select the time frame in which an employee gets paid for the number of units worked. Workday calculates pay for employees by using the employee's scheduled weekly hours or a user-defined annualization factor, as defined in the frequency definition. To ensure the proper calculation method, use the Maintain Frequencies task to review the calculation method for the selected frequency.
No Override	Select this check box to prevent these values from being overridden.

3. In the Plan Eligibility section, select 1 or more rules.

   Eligibility rules determine which employees are eligible for this salary plan. If you select multiple eligibility rules, Workday evaluates each rule independently to determine employee eligibility for the plan. Employees are eligible if they meet the qualifications of any one rule.

Next Steps

You can:

- Assign (roll out) the plan to employees on the Rollout Compensation Plans to Employees task.
- Add the plan to a compensation package on the Create Compensation Package task.
- Access the Salary Plan report for detailed information on a specific plan.
- Access the Edit Salary Plan task.

  You can update default values only for plans not yet assigned to employees. You can, however, update the Compensation Element field regardless if the plan is assigned or not.
- Adjust default values for assigned plans on the Set Up Unit Salary Plan Adjustment task.
- Hide the compensation plan type from specified groups of workers using the *Worker Data: Compensation Plan Type* domain in the Core Compensation functional area.

Related Information

Tasks

Steps: Set Up Salary Plans on page 1068

Set Up Adjustments to Unit Salary, Hourly, Allowance, and Commission Plans on page 1030

Create Period Salary Plans

Prerequisites

- Set up compensation components and grades.
- Create compensation basis.
- Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.

Context

Create a plan that enables you to assign extra months, weeks, or days of pay to employees.

Steps

1. Access the Create Period Salary Plan task.
2. In the Details section, select Inactive to indicate the plan isn't available for use.

   Processes already using plans marked Inactive complete as normal.
3. In the Period Salary Defaults section, consider:

Option	Description
Compensation Element	Compensation elements store the earnings associated with compensation. If you select a compensation element designated as base pay, Workday includes the plan's compensation in the employee's base pay calculation.
Compensation Period Multiplier	Multiplies the Compensation Period. (Up to 2 decimal places allowed.)

Option	Description
	Example: If the Compensation Period Multiplier is 15.50 and the Compensation Period is Day, Workday assigns 15.50 extra days to pay employees.
Compensation Basis	Available if you select the Percent Based Plan option. Select the compensation basis Workday uses to determine the target amount (if the worker isn't managed by a compensation basis) for this plan. If the worker is managed by a compensation basis, Workday doesn't exclude this plan when calculating the target amount. If you select a compensation basis that includes this plan, Workday excludes this plan when calculating the employee's target amount. If you select a subtractive compensation basis, Workday subtracts the subtractive basis amount from the worker's primary compensation basis before calculating the percentage-based target amount. If the plan is part of a compensation basis that has the Manage Basis Total check box selected, you can't change the selected compensation basis. In this case, the period salary plan works like any other proportional plan. Workday allows individual plan changes in business processes that allow compensation changes.

4. In the Plan Eligibility section, select 1 or more rules.

   Eligibility rules determine which employees are eligible for this period salary plan. If you select multiple eligibility rules, Workday evaluates each rule independently to determine employee eligibility for the stock plan. Employees are eligible if they meet the qualifications of any one rule.
5. (Optional) Complete the Period Salary Plan Profiles section.

   This enables you to have different payout amounts for different groups of employees.

   Example: You can set up 1 profile where the target for an individual employee is 2 months total base pay and another with 3 months total base pay.

Next Steps

You can:

- Assign (roll out) the plan to employees on the Rollout Compensation Plans to Employees task.
- Add the plan to a compensation package on the Create Compensation Package task.
- Access the Salary Plan report for detailed information on a specific plan.
- Access the Edit Period Salary Plan task.

  You can update default values only for plans not yet assigned to employees. You can, however, update the Compensation Element field regardless if the plan is assigned or not.
- Hide the compensation plan type from specified groups of workers using the *Worker Data: Compensation Plan Type* domain in the Core Compensation functional area.

Related Information
Tasks

Steps: Set Up Salary Plans on page 1068

Roll Out Compensation Plans to Employees on page 1027

Hourly Plans

Steps: Set Up Minimum Wage for Hourly Plans

Prerequisites

To use city, county, and local rates delivered by Workday, specify a Local Minimum Wage Authority on the location of a business site. See Steps: Set Up Local Minimum Wage Rates.

Context

You can configure minimum wage on an hourly plan using:

- A flat rate, or Custom Minimum Wage.
- Minimum wage rates maintained by Workday Payroll, or Payroll Authority Minimum Wage.
- A calculation, or Calculated Minimum Wage.

Configuring minimum wage for hourly plans helps you:

- Support minimum wage requirements for hourly workers.
- Simplify administrative processes related to minimum wage management by automatically updating minimum wage assignments when rates change.
- Improve accuracy by reducing manual entry errors when assigning minimum wage.

Payroll Authority Minimum Wage functionality is available to all HCM customers. However, hourly plans that are configured with Payroll Authority Minimum Wage can only use rates that Workday Payroll delivers. Currently, Workday delivers rates in the following locations:

- United States
- Canada

Steps

1. (Optional) Access the Create Security Policy for Domain task.

   Complete the task:

Option	Description
For Domain	Select *Set Up: Payroll Authority Minimum Wages View*.
Confirm	Select the check box.
Security Group	Add *Compensation Administrators*.
View	Select the check box.
Modify	Select the check box.

   This security policy enables the Compensation Administrators to view Payroll Authority Minimum Wage tables and related reports.

   Security: *Security Configuration domain* in the System functional area.
2. (Optional) Activate Pending Security Policy Changes.

3. Configure a minimum wage type on your hourly plan and edit the status of the Enforce Minimum Wage check box.

   You can use the:

   - Create Hourly Plans or the Edit Hourly Plans task. See Create Hourly Plans on page 1077.
   - *Put Compensation Plans* EIB.
   - Set Up Hourly Plan Adjustment task only for hourly plans configured without minimum wage or configured with Custom Minimum Wage.
4. Assign new or update existing minimum wage assignments for workers to comply with the minimum wage amount on the hourly plan.

   You can:

   - Use the *Hourly Plan Assignment Updates for Worker by Position* mass operation type on the Mass Operation Management task. See Steps: Set Up Mass Operations for Minimum Wage on page 1076.
   - Update assignments manually using the *Request Compensation Change* web service. See Concept: Request Compensation Change EIB.
   - Use the Set Up Hourly Plan Adjustment task to update assignments only for workers who are assigned an hourly plan configured without minimum wage or configured with Custom Minimum Wage.
5. Access the Minimum Wage Audit for Worker Assignments by Position report.

   Identify workers paid below the minimum wage amount that you configured for the hourly plan.

   Security: *Worker Data: Staffing Reports with Compensation Data* domain in the Staffing functional area

Result

Workday applies the minimum wage that you configured to workers who:

- Are assigned a new hourly plan.
- Have an existing hourly plan assignment.

Workday doesn't display the Minimum Wage field in the Hourly Plan tasklet for hourly plans that use Payroll Authority Minimum Wage or Calculated Minimum Wage when:

- There's no table data available for the worker's location.
- The calculated value for minimum wage is zero.

Next Steps

Because the Minimum Wage field in the Hourly Plan tasklet of compensation events is based on the hourly plan's configuration, the field's value could update while an event is in progress. As a best practice, we recommend you verify that the proposed hourly plan assignment's Amount reflects:

- The most recent Minimum Wage value.
- Your original intended compensation change in each business process review step.

If you didn't select the Enforce Minimum Wage check box on the hourly plan, you can configure:

- Validation conditions for business process steps on an hourly plan that doesn't enforce minimum wage. See Steps: Configure Business Process Definitions.
- Minimum wage validations for compensation reviews using the Minimum Wage Amount report field.

You can also configure custom notifications to alert Compensations Administrators about:

- The status of minimum wage compliance across your workforce on the Minimum Wage Audit for Worker Assignments by Position report.
- Updated minimum wage rates on the Payroll Authority Minimum Wage tables from the Payroll Compliance Update Documentation report.

Related Information

Tasks

Set Up Adjustments to Unit Salary, Hourly, Allowance, and Commission Plans on page 1030

Create Custom Notifications

Examples

2025R1 Feature Release Note: Minimum Wage in Compensation

Steps: Set Up Mass Operations for Minimum Wage

Context

When you first assign an hourly plan to a worker, Workday populates the value of the Minimum Wage field as the default assignment Amount for a worker in a compensation event. This Amount value isn't updated automatically if there are changes to the Minimum Wage field due to:

- Workday-delivered Payroll Authority Minimum Wage rate updates.
- Recalculations of the minimum wage configured on the hourly plan.

To automatically update hourly plans that use Payroll Authority Minimum Wage or Calculated Minimum Wage, you can use the Mass Operational Management task to:

- Help you support compliance by scheduling daily updates for minimum wage rates on hourly plan assignments.
- Efficiently modify the minimum wage rate for a large number of workers with hourly plans by reducing manual maintenance.

Steps

1. Create a Segment-Based Security Group for Mass Operations.

   On the Create Security Group task, select:

Option	Description
Type of Tenanted Security Group	*Segment-Based Security Group*
Security Groups	• *HR Administrator* • *Compensation Administrator*
Access to Segments	*Hourly Plan Assignment Updates*

2. Edit Domain Security Policies.

   Grant your segment-based security group View and Modify permissions to the *Mass Operation Management* domain in the System functional area.
3. Copy Reports.

   Create a copy of the Minimum Wage Audit for Worker Assignments by Position standard report.
4. (Optional) Access the Maintain Event Categories and Reasons task.

   Define the reason for the *Request Compensation Change* event.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
5. Set Up Mass Operations.

   Complete the Mass Operation Management task:

Option	Description
Mass Operation Type	Select *Hourly Plan Assignment Updates for Worker by Position*.

Option	Description
Input Report	Select your copy of the Minimum Wage Audit for Worker Assignments by Position standard report.
Run Frequency	Schedule the desired frequency you want Workday to run the report.

6. Complete the Mass Operation Configuration section:

Option	Description
Validate Only	Select this check box to only view proposed assignment updates.
Effective Date	Enter the date for when you want the compensation event to take effect.
As-of Date	Enter the date for when you want the proposed new Minimum Wage amount to take effect.
Hourly Plan	Select at least one hourly plan to update the worker assignments assigned to the plan.
Action	When you select *Adjust to New Defaults*, Workday assigns the hourly plan value to a worker based on the As-of Date. When you select *Adjust by Custom Amount*, enter a flat amount for Workday to use to adjust a worker's hourly assignment without changing the hourly plan default. Example: You enter *5* for Adjust by Custom Amount to update Terry's hourly rate from 10.00 USD to 15.00 USD. Note: Workday doesn't process Adjust by Custom Amount as an override for the worker.

Result

Workday updates minimum wage assignments for all workers on the hourly plans that you selected.

You can view Positions Processed and Positions Bypassed in the Results section of the Mass Operation Management background process to identify workers whose assignments weren't updated and why.

Create Hourly Plans

Prerequisites

- Set up compensation components and grades.
- Security in the Core Compensation functional area:
  - *Set Up: Base and Plan* domain.
  - *Set Up: Payroll Authority Minimum Wages View* domain. This domain is required only if you want to view thePayroll Authority Minimum Wages report and Payroll Compliance Update Documentation report.

Context

You can create or update an hourly plan that you assign to eligible employees. You can also annualize hourly plans by setting the annualization factor on the Maintain Frequencies task.

Steps

1. Access the Create Hourly Plan task.
2. From the Minimum Wage prompt in the Minimum Wage section:

Option	Description
Calculated Minimum Wage	Select this option to use an Amount Calculation in the Compensation category when defining minimum wage on the plan. When you use this option, you can use one hourly plan for workers across multiple countries by not selecting an option for Currency. Example: You want to calculate your minimum wage by using a minimum wage rate maintained by Payroll while paying 2.00 USD above the Workday-delivered minimum wage rate.
Custom Minimum Wage	Select this option to enter a flat rate Amount that defines the minimum wage in the regulatory region where this hourly plan is in use. Example: You want to set minimum wage of the hourly plan to 18.00 USD.
Payroll Authority Minimum Wage	Select this option to use the rates delivered by Workday in the Payroll Authority Minimum Wage tables. When you use this option, you can set up separate hourly plans by country to specify a Currency per hourly plan. In compensation events, the Minimum Wage Amount is based on the current Minimum Wage rate in the Payroll tables as of the event's effective date. Workday uses the worker's location to: • Identify which rates to use. • Select the highest rate from federal, state, and local authorities. Example: You want to assign the mandated minimum wage rate to hourly workers in San Francisco as of 07/01/24, which is 18.67 USD. When a worker is assigned to multiple positions, Workday assigns a minimum wage rate based on the location of the position associated with the compensation business process. You can access the All Payroll Authority Minimum Wages report to review the minimum wage rates.

3. (Optional) In the Minimum Wage section, select the Enforce Minimum Wage check box to display a critical error message in compensation events.

   This critical error prevents users from assigning an Amount that's below the minimum wage rate configured on the hourly plan.
4. In the Hourly Defaults section:

Option	Description
Compensation Element	Compensation elements store the earnings associated with compensation. If you select a compensation element designated as base pay, Workday includes the compensation for a plan in the employee's base pay calculation.

Option	Description
Currency	If configured, the hourly plan's Currency overrides the currency setting: • The compensation grade or grade profile. • Your tenant's default currency. As a best practice, Workday recommends that when you configure the Currency field, consider how it interacts with these minimum wage types: • Payment Authority Minimum Wage • Calculated Minimum Wage See Concept: Minimum Wage in Compensation on page 1079.
Frequency	Select *Hourly* so that the employee gets paid by the hour. Workday calculates pay for employees by using the employee's scheduled weekly hours or a user-defined annualization factor, as defined in the frequency definition.

5. In the Plan Eligibility section, select 1 or more rules.

   Employees are eligible if they meet the qualifications of any 1 rule. If you select multiple eligibility rules, Workday evaluates each rule independently to determine employee eligibility for the plan.
6. In the Plan Eligibility section, select the Exclude from Merit check box if you don't want this plan to be available when you initiate a compensation review process.

Next Steps

You can:

- Assign the plan to employees on the Request Compensation Change task or web service.
- Add the plan to a compensation package on the Create Compensation Package task.
- Access the Hourly Plan and View Hourly Plan Usage reports.
- Access the Edit Hourly Plan task. You can update default values only for plans not yet assigned to employees. You can, however, update the Compensation Element field regardless if the plan is assigned or not.
- Update default values for new and assigned plans or adjust existing assignments using the Set Up Hourly Plan Adjustment task. You can only use this task for hourly plans configured without minimum wages or configured with Custom Minimum Wage.
- Hide the compensation plan type from specified groups of workers using the *Worker Data: Compensation Plan Type* domain in the Core Compensation functional area.

Related Information

Tasks

Set Up Adjustments to Unit Salary, Hourly, Allowance, and Commission Plans on page 1030

Steps: Set Up Compensation Components on page 979

Steps: Propose Compensation for Employees or Positions on page 1032

Concept: Minimum Wage in Compensation

Enforce Minimum Wage

When you select the Enforce Minimum Wage check box, Workday:

- Enforces the minimum wage rate set on the plan.
- Triggers a critical error if you try to assign an Amount less than the default Minimum Wage configured on the hourly plan.

When you assign minimum wage to a worker, you must enter an assignment amount that's equal to or greater than the recommended rate in the Minimum Wage display field, which uses the amount from the hourly plan. These validations help identify and reduce errors due to assignments or changes to a worker's mandated minimum wage rate.

When the Enforce Minimum Wage check box is cleared, Workday doesn't display a critical error.

Updating Hourly Plans with Minimum Wage

When you change them minimum wage type on an existing hourly plan, consider both the current and proposed minimum wage types when applying changes to workers' assignments:

Current Minimum Wage Type	Proposed Minimum Wage Type	Recommended Related Tasks or EIB
• No minimum wage • Custom Minimum Wage	• Custom Minimum Wage • No minimum wage	You can use the Set Up Hourly Plan Adjustment task. Note: You can't assign an Amount using the Edit Hourly Plan task or the *Put Compensation Plan* EIB for these minimum wage types.
• Payroll Authority Minimum Wage • Calculated Minimum Wage	• No minimum wage • Custom Minimum Wage	You can: 1. Update the minimum wage type on the Edit Hourly Plan task. 2. Enter an Amount on the Set Up Hourly Plan Adjustment task.

Currency and Minimum Wage in Compensation

As a best practice to help you maintain compliance, Workday recommends that when you configure the Currency field on the hourly plan, consider:

Currency Configured on Hourly Plan?	Minimum Wage Type Selected?	Considerations
Yes	*Payment Authority Minimum Wage*	Workday: • Converts the currency of the Payment Authority Minimum Wage rate to the currency specified on the plan. • Displays worker assignments in that currency.
No	*Payment Authority Minimum Wage*	Workday assigns currency based on the pay range grade or grade profile, if configured, or your tenant's default currency. The currency set on the Payroll Authority Minimum Wage rate doesn't affect plan assignments.

Currency Configured on Hourly Plan?	Minimum Wage Type Selected?	Considerations
Yes	*Calculated Minimum Wage*	Workday converts Calculated Minimum Wage to the currency specified on the plan.
No	*Calculated Minimum Wage*	Workday assigns currency based on the pay range grade or grade profile, if configured, or the tenant's default currency.

Minimum Wage in Compensation Events

You can use the Minimum Wage field on the Hourly Plan tasklet of compensation events to review and verify the minimum wage rate configured on the plan. Workday populates this field based on:

- The minimum wage configured on the hourly plan.
- The compensation event's effective date.

The Hourly Plan tasklet automatically populates the value of the Minimum Wage field into Amount only when you first assign an hourly plan to a worker. For existing assignments, Workday doesn't automatically update the Amount assigned to a worker. If the minimum wage on an hourly plan has changed, Workday displays:

- The updated rate in the Minimum Wage field.
- The current Amount assigned before the worker's hourly plan changed.

If you don't manually update the assignment Amount, there could be differences between the Minimum Wage field and the Amount assigned to a worker.

As a best practice to help you maintain minimum wage assignments for compliance, we recommend that you:

- Enforce minimum wage on your hourly plans.
- Schedule mass operations for minimum wage to run daily on the current date.

Report Fields for Minimum Wage

You can use these fields to customize reports and to configure calculations for hourly plans with Calculated Minimum Wage:

Field	Business Object	Description
Minimum Wage		Indicates if an hourly plan has a configured minimum wage.
Minimum Wage Amount	Compensation Plan Assignment	Displays the minimum wage rate for a worker based on: • Their hour plan assignment. • The effective date.
Minimum Wage Amount - Current	Compensation Assignment Proposal	Displays the current minimum wage rate for a worker based on the effective date.
Minimum Wage Amount - Proposed	Compensation Assignment Proposal	Displays the proposed minimum wage rate for a worker based on the effective date.

Related Information

Reference

Reference: View Tax Authority Data (USA)

Reference: View Tax Authority Data (CAN)

Allowance Plans

Create Allowance Plans

Prerequisites

- Set up compensation components and grades.
- Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.

Context

You can create allowance plans for employees as part of their regular paycheck using the pay calculation process.

Examples:

- A cell phone allowance for a flat amount of 150 USD per month.
- An off-site reimbursement allowance of 10 percent of an employee's base pay salary per month to offset temporary relocation.
- A car allowance of 300 miles per week paid at 3 USD per mile.

You can link allowance plans to expense items and pay out to employees using the settlement process. Example: A tuition reimbursement program for a flat amount of 2,500 USD, or a specific number of units per quarter.

Steps

1. Access the Create Allowance Plan task.
2. Select:

Option	Description
Reimbursable	Select this option to link the allowance plan with an expense item. The expense item for reimbursement accounts must have an Expense Item Amount Type of Based on Allowance Plan. See: dan1370797733661.dita If selected, you can't: • Add a compensation element to this plan. • Update the Percent Based Plan options. You can access the View Reimbursable Allowance Plan Activity report and configure it to display on the View Worker, Worker Profile, and Talent Profile.
Amount Based Plan	Targets for the plan are based on a fixed monetary amount.

Option	Description
Percent Based Plan	Targets for the plan are based on a percentage of salary. This option isn't available if you selected the Reimbursable option.
Unit Based Plan	Targets for the plan are based on a number of units.

3. In the Details section, consider:

Option	Description
Inactive	Select this check box if the plan isn't available for use. Processes already using this plan complete as normal.
Expense Item	Available if you select the Reimbursable option. To be part of a settlement process, the plan must be linked to the Expense Item.
Expense Accumulator	Available if you select the Reimbursable option. Workday Expenses provides these options: • *Month to Date* • *Month with Custom Start Date* • *Year to Date* • *Year with Custom Start Date*
Allow Overage	Displays if you select the Reimbursable option.

4. In the FTE section, consider:

Option	Description
Apply FTE%	Select this check box to prorate the compensation for employees assigned to this plan based on their full-time equivalent hours percentage. You can enable Paid FTE in the Staffing section on the Maintain Localization Settings task. If enabled, Workday prorates using paid FTE on compensation plans. Otherwise, Workday calculates FTE by dividing `Scheduled Weekly Hours / Default Weekly Hours` when proposing compensation during these business processes: • *Offer* • *Employment Agreement* • *Hire* • *Change Job* • *Edit Position*
Use Assigned Value in 100% Calculations	For amount or unit-based plans only. This option doesn't apply to workers Managed by Basis Total (MBT).

Option	Description
	If selected, Workday uses the assigned amount on the plan as the fixed proration value and the 100% value in calculations. If not selected, Workday divides the assigned amount by the employee's FTE for 100% FTE calculations. Example: You assign a worker with 50% FTE amount-based Bonus Plan A for 1,000 and amount-based Allowance Plan B for 1,000. You select the Use Assigned Value in 100% Calculations for Bonus Plan A and None of the above for Allowance Plan B. The 100% FTE value calculated for Bonus Plan A is the assigned amount of 1,000. Workday doesn't divide this amount by the worker's FTE. The 100% FTE value calculated for Allowance Plan B is 2,000, which equals the assigned amount (1000) divided by the employee's 50% FTE (0.5): (1000/0.5 = 2000).
None of the Above	Workday doesn't apply FTE% and doesn't use the assigned plan value in 100% calculations.

5. In the Allowance Defaults section, consider:

Option	Description
Compensation Basis	Available if you select the Percent Based Plan option. Select the compensation basis Workday uses to determine the target amount (if the worker isn't managed by a compensation basis) for this plan. If the worker is managed by a compensation basis, Workday doesn't exclude this plan when calculating the target amount. If you select a compensation basis that includes this plan, Workday excludes this plan when calculating the employee's target amount. If you select a subtractive compensation basis, Workday subtracts the subtractive basis amount from the worker's Primary Compensation Basis before calculating percentage-based target amount.
Compensation Element	Unavailable if you select the Reimbursable option. Compensation elements store the earnings associated with compensation. If you select a compensation element designated as base pay, Workday includes the plan's compensation in the employee's base pay calculation.
Amount	Displays if you select the Amount Based Plan option. Enter the flat amount to be paid to the employee.
Percent	Displays if you select the Percent Based Plan option.

Option	Description
	Enter the percent to use to determine the amount to be paid to the employee: `Allowance = (percent) X (base pay)`
Number of Units	Displays if you select the Unit Based Plan option. The number of units to be paid to the employee.
Unit	Displays if you select the Unit Based Plan option. The measurement in which the employee is paid.
Per Unit Amount	Displays if you select the Unit Based Plan option. The monetary value associated with each unit.
Currency	Displays if you select the Amount Based Plan or Unit Based Plan options. The currency in which the allowance is paid.
Frequency	Identifies how often you want the allowance to be paid.
No Override	To prevent the override of these values for employees assigned to the plan, select this check box. • Amount • Percent • Number of Units • Per Unit Amount • Currency
Rounding Rule	Displays only when you've selected a Percent Based Allowance Plan. For MBT workers with prorated compensation, Workday ignores any rounding rule on the allowance plan. Workday uses the pay range frequency to calculate the rounded compensation amount in Workday and payroll calculations.

6. (Optional) Configure a ceiling for a percent-based allowance plan.

   Enter a Ceiling Amount and a Ceiling Currency to place an upper limit on the allowance plan.
7. (Optional) Create Compensation Rounding Rules.

   You can associate rounding rules with allowance, salary, merit, bonus, or stock plans, or with compensation bases managed by a compensation basis total.

   Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.
8. In the Plan Eligibility section, select 1 or more eligibility rules.

   You can't use an eligibility rule more than once in a plan.

   Eligibility rules determine which employees are eligible for this plan. Employees are eligible if they meet the qualifications of any 1 rule. If you select multiple eligibility rules, Workday evaluates each rule independently to determine employee eligibility for the plan.
9. If you selected an Amount Based or Percent Based plan option, select Exclude from Merit if you don't want this plan available when you initiate a compensation review process.

10. In the Allowance Plan Profiles section, configure these:

Option	Description
For amount-based plans	Amount, Currency, and Eligibility Rule.
For percent-based plans	Percent, Eligibility Rule, and Compensation Basis.
For unit-based plans	Number of Units, Per Unit Amount, Currency, and Eligibility Rule.

If you're defining the plan to have multiple targets, it enables you to create a single plan for what are effectively multiple plans. Example: You can set up one profile where the target for individual contributors is 500 USD and the target for directors is 1000 USD.

Next Steps

You can:

- Assign (roll out) the plan to employees on the Rollout Compensation Plans to Employees task.
- Add the plan to a compensation package on the Create Compensation Package task.
- Access these reports: Allowance Plan, Allowance Plans, and View Allowance Plan Usage.
- Access the Edit Allowance Plan task.

  You can update default values only for plans not yet assigned to employees. You can, however, update the Compensation Element field regardless if the plan is assigned or not.
- Adjust default values for assigned plans on the Set Up Allowance Plan Adjustment or Set Up Unit Allowance Plan Adjustment tasks.
- Hide the compensation plan type from specified groups of workers using the *Worker Data: Compensation Plan Type* domain in the Core Compensation functional area.

Related Information

Concepts

Concept: Compensation Basis on page 1137

Tasks

Roll Out Compensation Plans to Employees on page 1027

Set Up Adjustments to Unit Salary, Hourly, Allowance, and Commission Plans on page 1030

Reference

Reference: Full Time Equivalent in Compensation on page 1058

Commission Plans

Create Commission Plans

Prerequisites

- Set up compensation components and grades.
- Security: *Set Up: Commissions* domain in the Core Compensation functional area.

Context

Create or update a commission plan that you can then assign to eligible employees. Example:

- Field Sales Commission
- Inside Sales Commission

Steps

1. Access the Create Commission Plan task.
2. Select either Amount Based Plan or Percent Based Plan.
3. In the Details section, select the Inactive check box if the plan isn't available for use.

   Processes already using this plan complete normally.
4. In the Commission Defaults section, consider:

Option	Description
Compensation Element	Select the element mapped to a payroll earning you want associated with this plan. Compensation elements store the earnings associated with compensation. If you select a compensation element designated as base pay, then Workday includes the plan's compensation in the employee's base pay calculation.
Amount	Workday uses this amount if it can't find another target value for the employee.
Percent	You can use percent-based commission plans as part of an on target earnings structure that sets commission target as a percentage of a compensation basis. You can't include percent-based commission plans in compensation review processes.
Currency	Enables you to manage a commission plan in a single currency, but still accommodate employees with various currencies.

5. In the Plan Eligibility section, select 1 or more eligibility rules.
6. In the Draw Defaults section, the information you enter is for informational purposes and passing to a third-party commission application.
7. Complete the Commission Plan Profiles section:

   If you're defining the plan to have multiple targets, the plan profiles section enables you to associate different targets for different eligibility rules. Example: you can set up 1 profile where the target for individual contributors is 500 USD and another where the target for directors is 1000 USD.

Next Steps

- Assign (roll out) the plan to employees on the Rollout Compensation Plans to Employees task.
- Add the plan to a compensation package on the Create Compensation Package task.
- Access these reports: Commission Plan, Commission Plans, View Commission Plan Usage, and Workers on Commission Plans.
- Access the Edit Commission Plan task.

  You can update default values only for plans not yet assigned to employees. You can, however, update the Compensation Element field regardless if the plan is assigned or not.
- Adjust default values for assigned plans on the Set Up Commission Plan Adjustment task.
- Hide the compensation plan type from specified groups of workers using the *Worker Data: Compensation Plan Type* domain in the Core Compensation functional area.

Related Information

Tasks

Roll Out Compensation Plans to Employees on page 1027

Steps: Propose Compensation for Employees or Positions on page 1032

Set Up Adjustments to Unit Salary, Hourly, Allowance, and Commission Plans on page 1030

Reference

Reference: Compensation Plan Comparisons on page 1064

Merit Plans

Steps: Set Up Merit Plans

Prerequisites

Set up compensation components and grades.

Context

Merit plans can change base pay or promote employees to another grade or job (within the managers span of control). After you create the merit plan and assign it to employees, you use the compensation review process to implement proposed pay changes. These changes can rely on an optional compensation matrix.

Steps

1. (Optional) Steps: Create a Compensation Matrix on page 1151.

   If you want guidelines for minimum and maximum amounts when giving merit awards, you can create a compensation matrix.
2. (Optional) Create Eligibility Waiting Periods for Compensation Review Processes on page 1161.
3. (Optional) Create Time Proration Rules for Compensation Reviews on page 1162.
   Create or update the time proration rule you intend to use in the plan.
4. (Optional) Create Compensation Rounding Rules on page 1165.

   You can associate rounding rules with allowance, salary, merit, bonus, or stock plans, or with compensation bases managed by a compensation basis total.

   Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.
5. (Optional) Steps: Manage Compensation Basis on page 1133.
6. Create Merit Plans on page 1088.

Next Steps

You can also Create or Edit Compensation Packages to add the plan to the appropriate compensation package.

Related Information

Tasks

Roll Out Compensation Plans to Employees on page 1027

Reference

Reference: Compensation Plan Comparisons on page 1064

FAQ: Compensation Reviews on page 1185

Create Merit Plans

Prerequisites

- Set up compensation components and grades.
- Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Steps

1. Access the Create Merit Plan task.
2. In the Award Calculation section, consider:

Option	Description
Manage Basis Total	Select if you want to apply merit increases to the total Primary Compensation Basis (PCB) for an employee, instead of to total base pay. During a compensation review process, Workday automatically allocates amounts to the individual plans that make up the employee's PCB.
Allow Target Override	This makes the Individual Target field available for entry on the Request Compensation Change task and in compensation assignments for staffing events that include this plan.
Hide Target from Security Groups	Select 1 or more security groups from which to hide funded plan targets. Workday hides the funded plan target beginning on the effective date of the plan. Reports that display plan assignments hide plan targets only when the plan is in effect. Workday doesn't hide funded plan targets during the *Initiate Compensation Review Process* or during the *Offer* or *Employment Agreement* business processes in the Task Consolidation context.
Target %	Enter the recommended increase percentage. You can enter up to 4 decimal places. Available for percentage-based plans only. Required for all merit plans that use a compensation matrix or multiple targets. Workday uses this value if it can find no other target increase percent for the employee. This can happen when employees: • Have no individual target. • Aren't eligible for any of the multiple plan profile targets. • Are eligible for multiple plan profile targets. • Have no target pulled from a compensation matrix. You can use a Target % for single-target merit plans. Doing so gives you the option to create a merit plan without using it to budget for merit increases.

Option	Description
	Note: Always run the Employees without Unique Targets audit report before launching the compensation review process to identify the employees without a unique target.
Target Amount	Available for amount-based plans only. Enter the recommended positive or negative amount with up to 4 decimal places. Use the Target Amount to assign employees identical merit increases (or decreases). You can select amount-based merit plans when creating a compensation matrix.
Reference Currency	This enables you to manage a merit plan in a single currency, but still accommodate employees who use a variety of currencies.
Reference Frequency	Workday uses this frequency to calculate the actual cost of the award, plus or minus any currency fluctuations.
Subject to Statutory Minimum	Applies to percentage-based plans only. Select to indicate that the plan is subject to statutory increases. If selected as of the Process Period End Date, Workday lists plans subject to a statutory minimum when you initiate a compensation review process. Workday uses the statutory minimum percentage you enter to calculate the merit pool if greater than the merit plan target percentage.
Compensation Matrix	Select to base merit increases on factors such as employee's performance reviews and potential ratings.
Use as Reference Only	Available if you select a compensation matrix. Select if you don't want Workday to calculate the individual target or pool amount using the selected compensation matrix. Workday displays only the percentage when proposing the employee award.
Time Proration Rule	Select a rule to prorate employees' target compensation in a compensation event for this plan according to time-based criteria such as leave of absence or time since hire.

3. (Optional) In the Plan Eligibility section, select a Waiting Period.

   You can also access the Create Eligibility Waiting Period task.

   A waiting period restricts eligibility until after the employee satisfies the waiting period criteria. By using a waiting period, you can assign the plan at any time and rely on the waiting period to control eligibility.

   If the waiting period is still in effect as of the Process Period End Date configured on the compensation review process, Workday:

   - Includes the employee as an exception.
   - Sets the suggested target percent (and prorated target increase percent, if applicable) to zero.

   The pool doesn't reflect the employee target and managers can override the zero target value.
4. In the Process Eligibility section, consider:

Option	Description
Include Active Employees Assigned Plan During Process Period	If selected, employees assigned to the plan during the process period, but not currently assigned to the plan, are eligible for an award.
Include Active Employees in Waiting Period	Select if you want to include employees assigned to the plan but are in a waiting period included in a compensation review process. Workday doesn't calculate the employee target amounts, which display as zero.

5. In the Merit Plan Profiles section, enter a Target % and select an Eligibility Rule:

   This enables you to create a single budget for what are effectively multiple plans.

   You can set up 1 profile with a target for individual contributors at 3 percent and a target for directors at 6 percent.

   When the merit plan has multiple targets (plan profiles), Workday calculates the merit pool based on the appropriate target for each employee. Workday uses the Eligibility Rule on the plan profiles. The appropriate target percentage displays on the employee compensation. If Workday doesn't find a unique target using eligibility rules, it uses the target percentage from the plan defaults.

Result

When the compensation review process generates the merit pool, it accounts for the rules, profiles, and other settings in the plan. This enables you to make sound budgeting decisions. The combined use of a compensation matrix and a performance management review type enables you to pay employees for performance based on completed review results.

Next Steps

You can:

- Assign (roll out) the plan to employees on the Rollout Compensation Plans to Employees task.
- Add the plan to a compensation package on the Create Compensation Package task.
- Access the Merit Plan and Merit Plans reports.
- Access the Edit Merit Plan task.
- Hide the compensation plan type from specified groups of workers using the *Worker Data: Compensation Plan Type* domain in the Core Compensation functional area.

Related Information

Tasks

Steps: Set Up Merit Plans on page 1088

Steps: Add or Remove Employees to or from Compensation Reviews on page 1208

Create Compensation Rounding Rules on page 1165

Reference

FAQ: Compensation Reviews on page 1185
FAQ: Merit, Bonus, and Stock Pool Calculations on page 1192
FAQ: Rounding and Precision in Compensation Review Calculations on page 1197

Bonus Plans

Steps: Set Up Bonus Plans

Prerequisites

Set up compensation components and grades.

Steps

1. (Optional) Steps: Create a Compensation Matrix on page 1151.

   To pay for employee performance, create or update the compensation matrix for use with the plan.

   If you must update the compensation eligibility rules for an existing compensation matrix, change the rules using the Edit Compensation Matrix Rules task.
2. (Optional) Define Employee Review Types on page 1625

   To pay for employee performance or view it as part of the bonus proposals, create or update the review type for the plan.
3. (Optional) Create Eligibility Waiting Periods for Compensation Review Processes on page 1161
4. (Optional) Create Time Proration Rules for Compensation Reviews on page 1162
5. (Optional) Create Compensation Scorecards on page 1099

   Workday factors company performance into the bonus pool only if you add the scorecard to the bonus plan and you have a qualifying performance results set.
6. (Optional) Create Compensation Rounding Rules on page 1165

   You can associate rounding rules with allowance, salary, merit, bonus, or stock plans, or with compensation bases managed by a compensation basis total.

   Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.
7. (Optional) Steps: Manage Compensation Basis on page 1133

   To use Compensation Basis to calculate the target bonus of employees in percent-based plans, configure the Compensation Basis settings for your tenant.
8. (Optional) Create Deferred Bonus Calculations on page 1102
9. Create Bonus Plans on page 1094

Related Information

Tasks

Roll Out Compensation Plans to Employees on page 1027

Reference

Reference: Compensation Plan Comparisons on page 1064

Steps: Pay for Company Performance

Prerequisites

Establish the compensation structure for the bonus plan.

Context

Factor company performance into the bonus funding.

Steps

1. Concept: Company Performance Options on page 1106
   Decide how you want to fund bonuses for the organizations within the company.
2. (Optional) Edit Business Processes

   Add the *Manage Bonus Process Funding* as the last step of the compensation review business process.

   Example: This step enables you to adjust the bonus funding percent on approved bonuses as the last step on the compensation review process.

   If you're not using this optional step for the organization, Workday recommends using the completion step that comes in the standard business process setup.
3. Create Compensation Scorecards on page 1099
   Create or update the performance scorecard for the company.

   You can also import scorecard data into Workday with the *Put Compensation Scorecard* Enterprise Interface Builder (EIB) web service.
4. (Optional) Create Compensation Scorecard Results on page 1100

   Define the criteria for rating the performance of the company. You can rate company performance at any time during the compensation review process but when you rate performance affects bonus funding defaults.

   If you want company performance results factored into the bonus funding pool, create them before rolling out the bonus to organizations. You can add or create them later during the *Manage Bonus Process Funding* step.
5. (Optional) Create Bonus Plans on page 1094
   Add the company performance scorecard to a bonus plan.
6. Roll Out Compensation Plans to Employees on page 1027
   If the bonus plan is new, roll out the bonus plan to a target population of employees.
7. (Optional) Access the Maintain Bonus Accrual Estimates report.

   You can estimate and report on bonus costs using compensation review initiation criteria, including organizations, bonus plans, and date parameters.

   Security: *Process: Compensation Management Events* domain in the Advanced Compensation functional area.
8. Initiate Compensation Review Processes on page 1205
9. Steps: Recalculate Bonus Targets, Pool, and Awards During Compensation Reviews on page 1212

Steps: Set Up Eligible Earnings Overrides for Bonuses

Prerequisites

Define your bonus plans and related compensation structure.

Context

Define eligible earnings when you want to use a specific value as an employee's estimated earnings to calculate their percent of salary-based bonuses. Eligible earnings overrides can only be used in compensation review processes that include bonus awards.

Steps

1. In the Create Eligible Earnings Override Period task, define the eligible earnings period.

   Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

2. Create Bonus Plans on page 1094
   To use eligible earnings as the basis for calculating bonuses, select Eligible Earnings Override as the compensation basis.
3. Create Eligible Earnings Overrides for Bonus and Stock on page 1160
   Define the eligible earnings for the employee, including the amount, the applicable period, and the applicable bonus plans.
4. (Optional) Before running the compensation review process, view the Employees without Eligible Earnings Override report.

   Ensure that you defined eligible earnings for all employees assigned to the bonus plan who should be receiving the bonus. To define eligible earnings, select Compensation > Create Eligible Earnings Override from the worker's related action menu.
5. Initiate Compensation Review Processes on page 1205
   To calculate bonuses based on the eligible earnings, run the process for the bonus plan and eligible earnings period.

Create Bonus Plans

Prerequisites

- Set up compensation components and grades.
- Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Context

You can create bonus plans to assign to employees. When Workday generates the bonus pool as part of a compensation review process, it takes into account the rules and target profiles in the bonus plan.

When creating bonus plans, consider how you want to:

- Divide or consolidate bonus plans, by region, job level, job profile, or grade.
- Set up targets for each bonus plan, such as no target, a single target, or multiple targets.

Steps

1. Access the Create Bonus Plan task.
2. In the Details section, consider:

Option	Description
Inactive	Select if the plan isn't available for use. Processes already using this plan will complete as normal.
Compensation Element	Select the element mapped to the payroll earning you want associated with this plan.

3. In the FTE section, consider:

Option	Description
Apply FTE%	For amount-based plans only. If selected, Workday prorates the bonus for part-time employees assigned to this plan based on their FTE. You can enable Paid FTE in the Staffing section on the Maintain Localization Settings task. If enabled, Workday prorates using the paid FTE override on the position. Otherwise, Workday calculates FTE by dividing Scheduled Weekly Hours / Default Weekly Hours when proposing compensation during these business processes:

Option	Description
	• *Offer*. • *Employment Agreement*. • *Hire*. • *Change Job*. • *Edit Position*. • *Add Job*. • *Start International Assignment*.
Use Assigned Value in 100% Calculations	For amount-based plans only. This option doesn't apply to workers Managed by Basis Total (MBT). If selected, Workday uses the assigned amount on the plan as the fixed proration value and the 100% value in calculations. If not selected, Workday divides the assigned amount by the employee's FTE for 100% FTE calculations. Example: You assign a worker with 50% FTE amount-based Bonus Plan A for 1,000 and amount-based Allowance Plan B for 1,000. You select the Use Assigned Value in 100% Calculations for Bonus Plan A and None of the above for Allowance Plan B. The 100% FTE value calculated for Bonus Plan A is the assigned amount of 1,000. Workday doesn't divide this amount by the worker's FTE. The 100% FTE value calculated for Allowance Plan B is 2,000, which equals the assigned amount (1000) divided by the employee's 50% FTE (0.5): (1000/0.5 = 2000).
None of the Above	Workday doesn't apply FTE% and doesn't use the assigned plan value in 100% calculations.

4. In the Award Calculation section, consider:

Option	Description
Compensation Basis	Available if you select Percent Based Plan. Select the compensation basis Workday uses to determine the target amount for this plan. Workday doesn't exclude this plan when calculating the target amount for employees managed by a compensation basis. If you select a compensation basis that includes this plan, Workday excludes this plan when calculating the target amount. If you select a subtractive compensation basis, Workday subtracts the subtractive basis amount from the employee's Primary Compensation Basis before calculating percentage-based target amount. You can't change a compensation basis if the plan is part of compensation basis that has the Manage Basis Total check box selected.
Target Amount	Available for amount-based plans only. Enter the amount of the target bonus award. Workday uses the target amount when the employee: • Doesn't have an individual target.

Option	Description
	• Isn't eligible for any of the plan profile targets. • Is eligible for more than 1 plan profile target.
Target %	Available for percent-based plans only. Enter the percent of the target bonus award. Workday uses the target % when the employee: • Doesn't have an individual target. • Isn't eligible for any of the plan profile targets. • Is eligible for more than 1 plan profile target.
Reference Currency	Selecting the currency enables you to manage a bonus plan in a single currency but still accommodate employees who use other currencies.
Reference Frequency	Workday uses this frequency to calculate the actual cost of the award, plus or minus any currency fluctuations.
Company Funding Scorecard	Determines the funding of the target bonus pool. The compensation review process factors company performance into the bonus pool only if you add the scorecard to the bonus plan and you have qualifying performance scorecard results. The Company Funding Scorecard can't contain profiles. You can update results on the *Manage Bonus Funding* step of the compensation review process.
Plan Modifier Scorecard	If you want to modify the target, select a scorecard. The Plan Modifier Scorecard can contain profiles. You can update results on the Recalculate Pool and Awards task while the compensation review is in progress.
Time Proration Rule	Select a rule to prorate employees' target compensation for this plan according to time-based criteria such as leave of absence or time since hire.
Allow Target Override	If selected, you can override the default plan or profile target for an individual employee.
Hide Target from Security Groups	Select 1 or more security groups from which to hide funded plan targets. Workday hides the funded plan target beginning on the effective date of the plan. Reports that display plan assignments hide plan targets only when the plan is in effect. Workday doesn't hide funded plan targets during the *Initiate Compensation Review Process* or during the *Offer* or *Employment Agreement* business processes in the Task Consolidation context.

5. (Optional) In the Plan Eligibility section, select a Waiting Period.

   A waiting period restricts eligibility until after the employee satisfies the waiting period criteria. By using a waiting period, you can assign the plan at any time and rely on the waiting period to control eligibility.

   If the waiting period is still in effect as of the Process Period End Date configured on the compensation review process, Workday:

   - Includes the employee as an exception.
   - Sets the suggested target percent (and prorated target increase percent, if applicable) to zero.

   The pool doesn't reflect the employee target and managers can override a target value of zero.
6. In the Process Eligibility section, consider:

Option	Description
Include Active Employees Assigned Plan During Process Period	Indicates that employees assigned to the plan at any point during the process period, but not currently assigned the plan, are eligible for an award. Workday determines the related target from: • The individual override as of the date the employee was last assigned the plan. • The plan profile as of the compensation snapshot date. • Target Changes in Period if selected on the proration rule.
Include Active Employees in Waiting Period	Select if you want to include employees assigned to the plan and in a waiting period included in a compensation review process. Workday doesn't calculate the employee target amounts, which display as zero.

7. (Optional) Select 1 or more Coverage Date Eligibility rules.

   If configured, Workday:

   - Displays editable Coverage Start Date and Coverage End Date columns for bonus plans during compensation reviews.
   - Applies coverage dates to bonus awards resulting from the compensation review event. Coverage dates become visible in Workday Payroll and Payroll Integration when the compensation review completes.

   Coverage dates enable Workday Payroll or Payroll Integration to associate dates with the bonus for US Fair Labor Standards Act (FLSA) reporting requirements.
8. In the Performance Factors tab, consider:

Option	Description
Compensation Matrix or Compensation Matrix for Individual Performance Factor	Identifies the compensation matrix used to calculate the individual target amount during the compensation review process.
Use Matrix as Reference Only	Available when you select Bonus Plan with Compensation Matrix and enter a compensation matrix. Select if you don't want Workday to calculate the individual target or pool amount using the selected compensation matrix. Workday

Option	Description
	displays only the percentage when proposing the employee award.
Apply Net Attainment	If selected, Workday uses net attainment as a multiplier for the bonus target or bonus amount during compensation reviews. Example: If a discretionary target with a weighted matrix is equal to 2000, a Net Attainment Percent of 50% reduces it to 1000.
Weighting	The total weight between all compensation matrices and scorecards must equal 100 percent.
Compensation Scorecards	Enter 1 or more scorecards. Workday uses them to calculate the bonus award.
Modifier	If you want to modify an individual performance or performance scorecard award amount, select a scorecard.

9. Enter a Tranche number and Tranche Percent for each tranche.

   You can define bonus plans distributed in predefined portions or installment amounts. Workday calculates the portions or installments by prorating the overall bonus target using a tranche percent.
10. In the Deferred Bonus tab, consider:

   You can configure the bonus plan to divide the deferred payments into an initial cash award, followed by a stock plan disbursement.

Option	Description
Deferred Bonus Eligibility	Select eligibility rules.
Default Calculation	Select a calculation created on the Create Deferred Bonus Calculation task.
Deferred Bonus Profiles	Select an Eligibility Rule, Calculation, and Stock Plan for subgroups of the employee population defined by the Deferred Bonus Eligibility rule.

   Workday uses the Default Calculation and Default Stock Plan for employees that either meet none or meet more than 1 of the deferred bonus profiles.

   During compensation review processes with bonus awards, Workday uses these eligibility rules and the associated calculations and stock plans to determine how to divide deferred bonus awards.

   You can override deferred bonus values if your compensation review grid configuration includes Deferred Bonus Amount, Deferred Bonus Percent, or both as editable columns.

Result

For percent-based plans, Workday multiplies the basis amount by the target percent to derive the target amount. For amount-based plans, Workday simply adds the targets for the employee. Workday then sums these employee target amounts to derive the organizational bonus pools and the overall bonus pool for the process.

For Bonus Plan Modifiers, Workday calculates individual employee target amounts:

```
Compensation Basis * Target Percent or Target Amount * Individual Performance
Scorecard Results
```

If you use modifiers, Workday automatically adjusts the pool and employee award amounts.

For tranches, Compensation Administrators are responsible for rolling out the correct number of bonus events and tranches for the bonus period. To base the final true up bonus on the difference between the true up target and completed payments, use the Complete Future Payment True Up Bonus task.

Example

If an employee:

- Earns 100,000 per year.
- Has an overall bonus target of 40%.
- The target for the first tranche is 12.5%.

The employee is eligible to receive a 5000 bonus for the first tranche (100,000 * 0.4 * 0.125 * 1). If the manager proposes a bonus for the employee, the suggested target bonus is 5000 or 5%.

Next Steps

You can:

- Assign (roll out) the plan to employees on the Rollout Compensation Plans to Employees task.
- Add the plan to a compensation package on the Create Compensation Package task.
- Access the Bonus Plan and Bonus Plans reports.
- Access the Edit Bonus Plan task.
- Hide the compensation plan type from specified groups of workers using the *Worker Data: Compensation Plan Type* domain in the Core Compensation functional area.

  Example: Use this security domain to hide the compensation plan type on the Compensation Plan Assignments report for workers in Germany. Workers can still see the plan name.

Related Information
Tasks
Steps: Set Up Bonus Plans on page 1092
Steps: Manage Compensation Basis on page 1133
Steps: Add or Remove Employees to or from Compensation Reviews on page 1208
Steps: Set Up Goals on page 1509
Reference
Reference: Full Time Equivalent in Compensation on page 1058
Examples
Net Attainment (Compensation)
Example: Time-Based Proration for Merit and Bonus Awards on page 1184

Create Compensation Scorecards

Prerequisites

- Create eligibility rules for compensation.
- Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Context

Scorecards capture company, division, or department goals and their attainment. A scorecard can have 2 components:

- Default scorecard goals
- Scorecard profile goals

You can assign a scorecard to percentage- or amount-based bonus plans. You can use scorecard profiles to override default goals and weightings using eligibility rules.

Example: Create a default scorecard to monitor goals for the Sales Department. If your sales employees are in different locations, they can have slightly different goals and weighting for 1 or more locations.

Example: You can create a company performance scorecard where customer satisfaction has the heaviest weight:

Scorecard Goal	Weight
All Critical Issues Resolved	20%
On-Time Product Delivery	15%
95 Percent Customer Satisfaction	50%
100 Million Annual Sales	15%

Steps

1. Access the Create Compensation Scorecard task.

   You can also import scorecard data into Workday with the *Put Compensation Scorecard* web service.
2. Select the Inactive check box if you don't want the scorecard available for use.

   If a process is already in-progress using this scorecard, it completes as normal.
3. In the Default Scorecard Goals section, enter a Scorecard Goal Name, Scorecard Goal Description, and Weight that you want to track.
   The sum weight of the goals must equal 100 percent.

Result

Rate the performance level for each criteria using the Create Compensation Scorecard Results task. Workday uses the results combined with achievement percentages to calculate the weighted results percent for the scorecard. If you include the scorecard performance in the bonus plan or when you initiate the compensation review process, Workday uses the weighted results when determining bonuses.

Next Steps

You can:

- Update or delete the scorecard using the Edit Compensation Scorecard task.

  You can edit or delete scorecards only if there are no performance results, or the current date is after the Evaluation Date of existing results. Example: If you have scorecard result sets from March 31 of this year and December 31 from the previous year, you can edit the scorecard only after March 31.
- Use scorecards to monitor performance, to influence funding for a bonus plan, or to adjust the funding amount after bonus approvals.

Related Information
Tasks
Create Eligibility Rules for Compensation on page 986

Create Compensation Scorecard Results

Prerequisites

- Create compensation scorecards.
- Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Context

Enter an achievement percent to rate the level of performance toward each goal within the selected compensation scorecard.

Note:

You can create company funding scorecard results:

- During the *Manage Bonus Process Funding* step in a compensation review process.
- Using the *Put Compensation Scorecard Results* web service.

You can also update in-progress compensation review processes with updated scorecard results using the Recalculate Pool and Awards task.

Steps

1. Access Create Compensation Scorecard Results.
2. Select the Evaluation Date on which to rate the performance.
   Workday associates this date with the performance result set.
3. For each criteria, enter an Achievement percentage to indicate how well the company did in meeting that performance goal.
   The Weighted Result Percent is the sum of Weight multiplied by Achievement for all rows of criteria. Workday automatically calculates and adjusts the value as you enter achievement percentages.

Result

The saved performance rating for the specified evaluation date becomes a performance result set. A result set is a combination of the performance scorecard and the evaluation date of the rating.

If you associate this scorecard with a bonus plan, Workday uses the company performance result set with the most recent Evaluation Date to determine bonus funding. If there are no results, the compensation review process continues and assumes 100 percent in calculating bonus funding.

Example

Performance Criteria	Weight	Achievement
All Critical Issues Resolved	20%	100%
On-Time Product Delivery	15%	100%
95 Percent Customer Satisfaction	50%	90%
100 Million Annual Sales	15%	200%

If you multiply the weight by the achievement for each row and sum all of the rows, you get a weighted funding of 110 percent.

Next Steps

To assign compensation plans to multiple employees, use the Rollout Compensation Plans to Employees task.

Related Information
Tasks

Roll Out Compensation Plans to Employees on page 1027

Create Deferred Bonus Calculations

Prerequisites

- Set up compensation eligibility rules.
- Set up stock plans.
- Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Context

You can give employees bonuses with an initial cash payment followed by a stock grant that vests over time. The deferred bonus calculation includes 1 or more amount ranges and corresponding deferred percentages. You can also configure a progressive calculation.

After you create the deferred bonus calculation, you can add it to bonus plans and specify the applicable eligibility rules and stock plans.

You can add Deferred Bonus Amount, Deferred Bonus Percent, or both as editable columns on your grid configuration. During compensation reviews, you can then override deferred bonus values for employees assigned to bonus plans with deferred calculations. The deferred bonus override amount must be 0.00 or greater and less than or equal to the total bonus amount.

Steps

1. Access the Create Deferred Bonus Calculation task.
2. Select Reference Field(s).
3. (Optional) Select the Progressive Calculation check box.

   If selected, Workday calculates deferred bonus payments progressively.

   Enter a Minimum Threshold amount to set the minimum bonus amount required for the progressive calculation. If the bonus amount is less than this minimum, Workday doesn't defer any bonus amount.
4. Configure the Definition of the calculation.

   Each row defines a range of bonus amounts and the percentage of the bonus to defer.

Example
This table depicts a nonprogressive deferred bonus calculation:

Range Name	To Value	Deferred Percentage
Tier 1	250,000	0%
Tier 2	500,000	10%
Tier 3	900,000	20%
Tier 4	1,500,000	30%
Max Tier	99,999,999	40%

The To Value of each row defines the lower limit of the range for the next row. Tier 2 has a lower limit of 250,000 because 250,000 is the To Value for Tier 1. In this deferred bonus calculation, a bonus award of 450,000 falls into Tier 2 with 10% deferred.

Related Information
Examples
Example: Deferred Bonus Progressive Calculation on page 1108

Create Future Payment Plans

Prerequisites

- Create bonus plans.
- Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.

Context

Create a future payment plan with a target that pays out to employees over several bonuses or one-time payments. To calculate the outstanding balance, add a final true-up process at the end.

Steps

1. Access the Create Future Payment Plan task.
2. In the Future Payment Defaults section, consider:

Option	Description
Allow Target Override	Select this check box to enable the entry of a target or percent for an individual employee assigned to the plan. To override the values for the plan and its profiles, enter an Individual Target when requesting a compensation change or assigning compensation. Example: Select this option to double the target for top performing individuals.
Compensation Element	Select a default compensation element. Compensation elements store the earnings associated with compensation. If you select a compensation element designated as base pay, Workday includes the compensation for the plan in the base pay calculation.
Reference Frequency	Workday uses the Reference Currency and Reference Frequency settings to calculate an estimated budget in a common currency and frequency. This is useful if you are in a global team environment.

Related Information
Tasks
Steps: Set Up Bonus Plans on page 1092
Roll Out Compensation Plans to Employees on page 1027
Calculate Outstanding Balances for Future Payment Plans on page 1104

Assign Future Payment Plans to Employees

Prerequisites

- Create a future payment plan.
- Security: *Worker Data: Compensation by Organization* domain in the Core Compensation functional area.

Context

You can assign 1 or more future payment plans with a target to pay out to employees:

- Over several bonus and one-time payments, and

- A final true up process at the end to calculate the outstanding balance to pay.

A future payment plan assignment is a package of assigned plans with an effective date.

Workday recommends that you have only 1 assignment per true up period. If the plan is paid out or processed and you want to assign a new target for the next period, make a new assignment.

Steps

1. Access the Assign Future Payment Plans task.

   This task is also available as a related action off the employee, under Compensation, provided a future payment plan is assigned.
2. Select the Effective as of date.

   An assignment of future payment plans is effective from this date until the day preceding the next set of assignments or forever if there's no subsequent set of assignments. You can't create 2 sets of assignments with the same effective date.

   The first time you create an assignment for an employee, Workday uses the eligibility rules associated with future payment plans to determine whether the employee matches the criteria. If the employee is eligible, Workday automatically populates Assign Future Payment Plans with this data. If the employee doesn't match any eligibility rule, Workday displays no plans.

   For subsequent assignments, Workday automatically pulls in all current plans and creates an entry for processed plans.

   If you create an assignment that has an earlier Effective as of date, Workday uses the eligibility rules to determine which plans to display.
3. Consider:

Option	Description
Individual Target	If you've enabled individual targets on the plan, you can enter an amount.
Processed	Indicates that the Complete Future Payment True Up Bonus has been run. You can't delete a plan that has the Processed check box selected.

Result

When you create an assignment of future payment plans to the employee, you must carry forward existing ones. If they aren't, Workday removes them from the employee.

Next Steps

You can use the Complete Future Payment True Up Bonus task to calculate the outstanding balance of a future payment or a bonus plan in tranches.

Calculate Outstanding Balances for Future Payment Plans

Prerequisites

- Assign future payment plans.
- Security: *Process: Compensation Plan Events* domain in the Core Compensation functional area.

Context

As the Compensation or HR Administrator, you can calculate the outstanding balance of a future payment or bonus plan in tranches. The target pool represents the amount still owed for the total true up pool.

Note: The Compensation History report displays all aspects of employee compensation.

This process doesn't address any salary changes during the period. If an employee in a future payment plan gets a salary increase during the period, the bonus calculation for that period might be higher. This might result in a lower target bonus during the true up process. The overall target bonus for an amount-based true up remains the same, regardless of salary fluctuations. For a percent-based true up, the overall target bonus fluctuates with salary changes.

Steps

1. Access the Complete Future Payment True Up Bonus task.
2. (Optional) Select Target Pay Date From and Target Pay Date To to narrow search results.
3. (Optional) Select 1 or more Organizations to narrow search results.
4. For each employee in the future payment plan, enter a Bonus Amount and a Target Payment Date.

   Workday pays the amount you enter on the date you select.

Example

You configure a future payment plan to consider multiple bonus and one-time payment plans. The target for the employees is 25,000 USD. In Quarters 1, 2, and 3, Workday pays the employees 6,250 USD and a one-time payment of 3,000 USD. The true up process calculates the outstanding balance as 3,250 USD.

Related Information
Tasks
Create Future Payment Plans on page 1103

Steps: Rescind or Forfeit Bonus Payments for Employees

Prerequisites

Enable the *Rescind* action for selected security groups in the *Employee Bonus for Bonus Process* business process.

Context

You can rescind or forfeit a bonus payment for a specific employee. You can also forfeit a one-time payment.

Steps

1. To rescind a bonus payment, as a related action off the worker, select Compensation > View Compensation History.

   On the Bonus and One-Time Payments tab, select Business Process > Rescind as a related action off the business process event for the worker's bonus payment.

   The *Initiate Compensation Review Process* must be complete.
2. To forfeit a bonus or one-time payment from the *Request One-Time Payment* business process, select Forfeit.

   - Configure the *Request One-Time Payment* process as a step on the *Termination* business process.
   - The Scheduled Payment Date must be after the Termination Date.
   - Select the Send to Payroll option on the payment.

   If you select Forfeit, Workday forfeits the payment, overriding Send to Payroll.

   The ability to forfeit applies only when the worker still has the primary position as when you configured the one-time or bonus payment. Workday only displays those payments for forfeit associated with the current position. Workday doesn't display a payment for forfeit if the worker changes jobs or gets a new primary position after you configured the payment. Example: Terry has a one-time payment associated with the old position and another associated with the current position. During the termination process for Terry, Workday displays only the one-time payment associated with Terry's current position, not the former position.

Result

The Workflow State for the employee's bonus payment updates to *Rescinded*.

Concept: Company Performance Options

Workday gives you several options for funding bonuses to factor in company performance. You can apply company performance results to:

- The initial bonus funding pool when you set up the compensation review process.

  To use this option:

  - Assign the compensation scorecard to the bonus plan.
  - Rate company performance before initiating the compensation review process.
- The updated bonus pool and spend for in-progress compensation reviews.

  To use this option:

  - Assign the compensation scorecard to the bonus plan.
  - Update company performance using the Edit Compensation Scorecard Results task while the compensation review process is in progress.
  - Use the Recalculate Pool and Awards task.
- Approved bonuses at the end of the compensation review process.

  To use this option:

  - Add the *Manage Bonus Process Funding* business process step to the organization's *Initiate Compensation Review Process* business process.
  - Assign the company funding scorecard to the bonus plan.
  - Rate company performance after bonus approval (once your results are in).

You can also:

- Use the compensation scorecard as a standalone way to track company performance.
- Give bonuses without taking company performance into consideration.
- Manually override the bonus funding percent before committing to it.

Depending on the option you select and when you rate company performance, Workday applies the performance results to bonus funding differently.

If You	And You Rate Performance before Compensation Review Process Initiation	And You Rate Performance after Compensation Review Process Approval
Apply company performance to the initial bonus funding pool only.	Workday includes company performance results when calculating the bonus funding pool.	Performance results have no impact because you haven't added the *Manage Bonus Process Funding* business process step to the organization's *Initiate Compensation Review Process* business process.
Apply funding to approved bonuses. You must add the	Assumes 100% funding.	Workday provides you with a step that enables you to use

If You	And You Rate Performance before Compensation Review Process Initiation	And You Rate Performance after Compensation Review Process Approval
Manage Bonus Process Funding step.		the new rating or to revise the funding percent.
Apply company performance to the initial bonus funding pool and apply funding to approved bonuses.	Workday includes company performance results when calculating the bonus funding pool.	Workday includes company performance results when calculating the approved bonuses.
Use the company performance scorecard only.	Performance results have no impact on bonus funding calculations. The scorecard is for tracking purposes only.	Performance results have no impact on bonus funding calculations. The scorecard is for tracking purposes only.
Award bonuses without accounting for company performance.	No impact to existing bonus processing. You aren't using compensation scorecards or the *Manage Bonus Process Funding* business process step.	No impact to existing bonus processing. You aren't using compensation scorecards or the *Manage Bonus Process Funding* business process step.

Concept: Future Payment Plans and True Ups

Compensation Administrators can create future payment plans to define the type of bonus (amount or percent) and bonus targets across multiple bonus or one-time payments. At the end of the period, the Compensation Administrator can true up a future payment plan by paying the outstanding balance. Future payment periods can extend beyond annual.

Typical bonus plans define the type of bonus (also amount or percent) and the plan target. A manager can distribute a bonus target over several predefined bonus payments (called tranches) and accumulate the bonus paid to date across bonus or one-time payment plans. Bonus plan frequencies can be annual, monthly, or quarterly. Bonus plans that include tranches don't use true up, but a future payment plan can include bonus plans that use tranches.

Plan Type	Security Group	Description
Future payment plan	Compensation Administrator	The bonus target can consider multiple bonus and one-time payment plans and does a true-up at the end to pay the outstanding balance.
Bonus plan with tranches	Manager	Workday pays out the bonus target in predefined installments using fixed frequencies.

A true up event represents a combination of fixed pay, variable pay, and short-term incentive pay. You can set a target bonus and accrue bonuses over the year or period until you reach the target bonus. A true up also enables you to distribute a total bonus in tranches over several periods. Distributing the payout over several tranches is an advantage to the company. The advantage to the employee is an advance on an annual bonus. During the final bonus cycle of the period, Workday totals and reconciles the individual period bonuses against the true up target. The final payout also provides an opportunity for managers to factor in performance against the period target for each employee.

There are 2 types of true up events:

- Single Plan True Up: The company grants an annual bonus (800) and defines tranches to pay out 1/8 of the target for the first 3 quarters. In the fourth quarter, the company pays the remaining 5/8

(500). Alternatively, a final process calculates the outstanding balance, paid as a true up. Workday supports this true up type within the current compensation review process.

- Multiple Plan True Up: The company sets a guaranteed minimum amount (800), and then awards various bonuses or one-time payments over the year. At the end of the year, you pay the remaining amount as the true up target. If an employee receives 3 bonuses totaling 500, the true up value is 300, which the Compensation Administrator or Manager can adjust. Workday can calculate the true up value across several bonus plans or one-time payment plans. Workday supports this true up type with these tasks:
  - Create Future Payment Plan.
  - Assign Future Payment Plans.
  - Complete Future Payment True Up Bonus.

In a single plan true up, Workday pays the total bonus amount in portions and prorates the bonus target by a percentage called a tranche percent.

Example: An overall bonus target is 40% and the target for the first tranche is 12.5%. An employee with an annual base salary of 100,000 is eligible to receive a 5000 bonus for the first tranche (100,000 X 0.4 X 0.125 X 1). When the manager proposes a bonus for this employee, Workday calculates 5000 or 5%. The employee receives 40% before the end of the true up period, but not all at once. You can define tranches to regulate when to pay bonuses and how much each portion is.

Note: The reference frequency for true up bonus plans or bonus plans with tranches is typically annual because the true up target is generally an annual target. In other words, the frequency reflects the true up period. If the bonus frequency doesn't reflect the true up period, Workday de-annualizes all employees' annual salaries and then applies the tranche percent, which might be inaccurate.

The purpose of a future payment plan is to contain the configuration options specific to the multiple plan true up process and the true up bonus target, currency, and frequency. The future payment plan is also the plan used when you launch the true up process. Future payment plans aren't full compensation plans. They're defined outside of worker compensation, similar to eligible earnings, and have the same security as eligible earnings.

Future payment plans enable you to enter multiple bonus and one-time payment plans, but not tranches, which apply only to bonus plans. Tranches apply to a single bonus plan target and are part of a single bonus plan. A future payment plan target can apply to multiple bonus and one-time payment plans.

Proration, waiting periods, and bonus accrual estimates aren't part of future payment plans. Merit Increase Matrices (MIM) don't apply to future payment plans. You can, however, assign a review type to the true up plan to view performance results for the period. Managers can also adjust recommended targets during a compensation review process.

To participate in a future payment plan, you must assign an employee to the plan and to any other relevant bonus plans for calculating the true up.

Related Information

Tasks

Create Future Payment Plans on page 1103

Assign Future Payment Plans to Employees on page 1103

Example: Deferred Bonus Progressive Calculation

Context

For progressive calculations, Workday applies more than 1 range to the same bonus award if there are marginal amounts.

Example: The deferred bonus calculation is:

Range Name	To Value	Deferred Percentage
Tier 1	250,000	Zero%
Tier 2	500,000	10%
Tier 3	900,000	20%
Tier 4	1,500,000	30%
Tier Max	99,999,999	40%

Kyle receives a 1,000,000 deferred bonus award. The deferred bonus calculation has the Progressive Calculation check box selected. The bonus award of 1,000,000 exceeds the 250,000 upper limit of Tier 1, leaving a balance of 750,000. Workday compares that balance to the upper limit of the tier and multiplies the smaller value by the deferral amount:

Tier	Remaining Bonus Amount	Difference from To Value	Smaller Value	Deferred %	Deferred Amount
1	1,000,000	250,000	250,000	Zero%	Zero
2	750,000	250,000	250,000	10%	25,000
3	500,000	400,000	400,000	20%	80,000
4	100,000	600,000	100,000	30%	30,000
Max	Zero	1,000,000	Zero	40%	Zero

The total amount deferred for Kyle's bonus award is 135,000.

Related Information
Tasks
Create Deferred Bonus Calculations on page 1102

Stock Plans

Steps: Manage Stock Plans and Grants

Prerequisites

Set up compensation components and grades.

Steps

1. Steps: Create a Compensation Matrix on page 1151
2. Access the Maintain Stock Grant Types task.

   Maintain the available grant types, view how many stock plans are using each type, and assign grant types to stock plans.

   Long Term Cash as a Grant Category enables you to offer cash that vests over time like stock.

   Security: *Set Up: Stock* domain in the Advanced Compensation functional area.
3. Access the Maintain Stock Vesting Schedules task.

   You can assign vesting schedules to stock plans. Use the Stock Vesting Schedules report to list all the entered vesting schedules.

   Security: *Set Up: Stock* domain in the Advanced Compensation functional area.

4. Access the Maintain Stock Date Rules task.

   Create rules that Workday uses to determine the vesting or expiration date for a stock grant. You can't delete stock date rules if their usage count is greater than zero. Rules are a concatenation of values in the Rule Type, Number, Unit, and From Date fields.

   Example:

   - Expiration Rule: Ten Years from Grant Date
   - Vest From Rule: Zero Days from Event Effective Date

   You can then assign expiration rules to a stock plan and use vesting rules when updating grants.

   Security: *Set Up: Stock* domain in the Advanced Compensation functional area.
5. (Optional) Create Compensation Rounding Rules on page 1165.

   You can associate rounding rules with allowance, salary, merit, bonus, or stock plans, or with compensation bases managed by a compensation basis total.

   Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.
6. (Optional) Access the Maintain Event Categories and Reasons task.

   You can enable the selection of reasons by manager role-based security group when requesting a stock grant. To do so, select Manager Reason for the *Request Stock Grant* business process, and the applicable reason code.
7. Create Stock Plans on page 1110.
8. Award stock to employees.

   Both of these tasks initiate the *Request Stock Grant* business process, but have important differences:

Request Stock Grant	This task is intended for Manager Self-Service for one stock grant to an employee or candidate at a time. See: Request Stock Grants on page 1113
Add Stock Grant	You can set up multiple grants and configure vesting details on this task. See: Add Stock Grants on page 1114

9. Create Stock Participation Rate Tables on page 1115.

Next Steps

To ensure that defaults display during staffing events, associate stock plans with a compensation package and rule.

Related Information

Tasks

Roll Out Compensation Plans to Employees on page 1027

Steps: Set Up Compensation Components on page 979

Create Stock Plans

Prerequisites

- Set up compensation components and grades.
- Security: *Set Up: Stock Plan* domain in the Advanced Compensation functional area.

Steps

1. Access the Create Stock Plan task.
2. Consider:

Option	Description
Amount Based Plan	Targets based on a fixed monetary amount.

Option	Description
Percent Based Plan	Targets based on a percent of salary.
Unit Based Plan	Targets based on a number of shares.

3. In the Award Calculation section, consider:

Option	Description
Allow Target Override	Select this check box if you want to enable overriding the default plan or profile target amount, percent, or shares. Example: For top performing individuals, you want to double the target.
Hide Target from Security Groups	Select 1 or more security groups from which to hide funded plan targets. Workday hides the funded plan target beginning on the effective date of the plan. Reports that display plan assignments hide plan targets only when the plan is in effect. Workday doesn't hide funded plan targets during the *Initiate Compensation Review Process* or during the *Offer* or *Employment Agreement* business processes in the Task Consolidation context.
Compensation Matrix	Select a compensation matrix if you want to give an individual employee stock grants based on a performance rating, retention rating, pay range quartiles, or eligibility rules.
Use as Reference Only	Available if you select a compensation matrix. Select if you don't want Workday to calculate the individual target or pool amount using the selected compensation matrix. Workday displays only the percentage when proposing the employee award.
Rounding Rule	Available for amount-based and percent-based plans only. During the *Update Stock Grant* business process, Workday calculates the number of shares by dividing the grant's currency amount or percent by the grant price. Workday applies the rounding rule to the number of shares granted.
Compensation Basis	Available if you select the Percent Based Plan option. Select the compensation basis Workday uses to determine the target amount (for employees not managed by a compensation basis) for this plan. For employees managed by a compensation basis, Workday doesn't exclude this plan when calculating the target amount.

Option	Description
	If you select a compensation basis that includes this plan, Workday excludes this plan when calculating the employee's target amount. If you select a subtractive compensation basis, Workday subtracts the subtractive basis amount from the employee's Primary Compensation Basis before calculating percentage-based target amount. You can't change the selected compensation basis if the plan is part of compensation basis that has the Manage Basis Total check box selected.
Use Target Currency for Grant	Available for amount-based plans only. Selecting this check box causes stock grants to display in the currency of the employee's plan target.

4. In the Stock Plan Defaults tab, consider:

Option	Description
Target Amount/Target %/Target Shares	The default recommendation for an employee assigned to this plan.
Currency	This enables you to manage a stock plan in a single currency, but still accommodate employees who use a variety of currencies.
Grant Type	Any grant type created using the Maintain Stock Grant Types task, such as ISO, RSU, or Cash. Note: Cash vests over time just like stock. In reports, Workday displays Cash grants under the Long Term Cash category.
Vesting Schedule	You can select a schedule for each Grant Type for both Stock Plan Defaults and Stock Plan Profiles.
Expiration Date Rule	Select a rule for each Grant Type for both Stock Plan Defaults and Stock Plan Profiles.

5. In the Stock Plan Profiles tab, enter values that differ from the defaults.

Next Steps

You can:

- Assign (roll out) the plan to employees on the Rollout Compensation Plans to Employees task.
- Add the plan to a compensation package on the Create Compensation Package task.
- Access the Stock Plan and Stock Plans reports.
- Access the Edit Stock Plan task.
- Hide the compensation plan type from specified groups of workers using the *Worker Data: Compensation Plan Type* domain in the Core Compensation functional area.

Related Information

Tasks

Create Compensation Packages on page 1044

Request Stock Grants

Prerequisites

- Security:
  - *Set Up: Stock* domain in the Advanced Compensation functional area.
  - Configure modify access on the *Candidate Data: Stock Grant Offer* domain in the Advanced Compensation functional area.
- Set up stock plans.
- Configure the *Request Stock Grant* business process to meet your needs.
- Configure the *Request Stock Grant Offer/Employment Agreement* business process if you use the Workday Recruiting *Offer* business process.

  If using Consolidated Tasks for *Offer*, select the Consolidate Tasks check box on the business process security policy.
- Access the Maintain Event Categories and Reasons task to create a reason for the *Stock Grant* category.

Context

Managers can request a stock grant for an individual employee or for a candidate as part of an *Offer*.

Steps

1. Access the Request Stock Grant task.
2. Consider:

Option	Description
Amount Requested	Available for stock plans based on currency amount.
Percent of Base Salary Requested	Available for stock plans based on percent of base salary.
Number of Shares Requested	Available for stock plans based on unit amount.

Result

Workday routes the request to the appropriate reviewers, if any, for approval according to the roles assigned to the *Review Stock Grant Request* step of the *Request Stock Grants* business process for the employee's organization.

Related Information

Tasks

Steps: Manage Stock Plans and Grants on page 1109

Steps: Update Approved Stock Grants on page 1117

Edit Business Processes

Steps: Set Up Task Consolidation for Offers on page 493

Add Stock Grants

Prerequisites

- Security: *Set Up: Stock* domain in the Advanced Compensation functional area.
- Configure the *Request Stock Grant* business process to meet your needs.
- Use the Maintain Event Categories and Reasons task to create a reason for the *Stock Grant* category.
- Set up stock plans.

Context

Award stock grants to 1 or more employees.

Steps

1. Access the Add Stock Grant task.
2. In the Stock Grant section, consider:

Option	Description
Percent Granted	Displays if the stock plan was created as a Percent. Enter the award as a percentage of base salary.
Amount Granted	Displays if the stock plan was created as an Amount Based Plan. Enter the award as a fixed monetary amount.
Shares Granted	Displays if the stock plan was created as a Unit Based Plan. Enter the award as a number of shares.
Converted Amount	Displays only for amount or percent-based plans and when the currency assigned to the employee is different than the currency for the grant price. Workday converts the amount or percent granted
Vesting Schedule	Displays the Vesting Schedule configured for the grant type on the stock plan or plan profile.
Vest From Date	The date that the stock grant becomes available to the employee. It's also the date that stock options become available for exercise. This is often the same date as the hire date or event date.
Options Pricing Factor	Displays only for amount-based or percent-based plans and when the grant category equals *Option*.

Option	Description
	Workday converts the amount or percent granted. Workday uses the Options Pricing Factor when calculating Calculated Shares.
Calculated Shares	Displays only for amount-based or percent-based plans. Workday calculates this value by dividing the amount granted by the Grant Price, and divided again by the Options Pricing Factor.

Next Steps

Access the Update Stock Grants task to update approved stock grants with the grant date, grant price, vest from date, and board approval.

Related Information

Tasks

Steps: Manage Stock Plans and Grants on page 1109

Edit Business Processes

Steps: Update Approved Stock Grants on page 1117

Edit Domain Security Policies

Create Stock Participation Rate Tables

Prerequisites

- Set up stock plans.
- Security: *Set Up: Stock* domain in the Advanced Compensation functional area.

Context

Stock participation rate tables enable managers to allocate stock to diverse populations of employees while maintaining control over the size of the pool. Eligibility rules control which employees can receive stock; participation rates control how much each employee contributes to the stock pool.

You can create rate tables based on:

- Classic criteria such as management level and grade.
- Eligibility rules.

You assign rate tables when you initiate a compensation review process with stock awards. Rate tables apply to any stock plan and any eligibility rules associated with the compensation review process.

During a compensation review process with stock, Workday evaluates each row of the rate table from top to bottom. Workday assigns only the first rate that applies to the employee and doesn't evaluate any others. If no rates apply, Workday uses the Default Percentage Rate.

To view the stock participation rate during a compensation review process, use a grid configuration that contains the Stock column group and the Stock Participation Rate % field.

If you use a rate table in a compensation review process, Workday disables the Autofill and Prefill functions for stock.

Steps

1. Access the Create Stock Participation Rate Table task.

2. Enter a Default Percentage Rate.

   Percentage rates can exceed 100. Workday uses the default rate if it can't find a match in the rate table.
3. Select the rate table type and enter 1 or more rows for Workday to evaluate when proposing awards:

Option	Description
Uses Classic Criteria	Select any combination of Management Level, Job Profile, Country, or Compensation Grade.
Uses Eligibility Rules	Select an Eligibility Rule .

   The Percentage Rate for either type of table can exceed 100.
4. Sort the rates in the order you want Workday to evaluate them.

   Workday assigns only the first rate that applies to the employee.

Result

The stock participation rate displays on when proposing stock awards during a compensation review.

Example

Company A has created a rate table with these dimensions:

- Table Name: Stock Participation – Management Level and Country
- Default Percentage Rate: 100%

Priority Order	Management Level	Country	Participation Rate
1	• Manager • Supervisor	• United States • United Kingdom • France • Canada	75%
2	• Manager • Supervisor	• Brazil • Russia • China • India • Mexico	65%
3	• Manager • Supervisor		50%
4	Individual Contributor		10%

Next Steps

You can:

- Edit rate tables using the Edit Stock Participation Rate Table task and delete them with the Delete Stock Participation Rate Table task. However, you can't edit or delete a rate table that's in use.
- Access the Stock Participation Rate Audit report to display workers, positions, assigned participation rate, and rate table dimensions. The report also lists multiple matches.

Related Information

Tasks

Create Grid Configurations for Compensation on page 1169

Initiate Compensation Review Processes on page 1205
Manage Awards for Compensation Reviews on page 1217

Steps: Update Approved Stock Grants

Prerequisites

Add and approve stock grants for 1 or more employees.

Context

You can update approved stock grants for an employee with the grant date, grant price, vest from date, and board approval.

There are 3 ways to update approved stock grants:

Stock Grant Update Option	Description
Update Stock Grants task.	Best used for individuals or a small numbers of employees.
Update Stock Grant Events mass operation type.	A less-complicated method, compared to web services, for updating large numbers of employees.
Update Stock Grant web service.	Best for integrated solutions and large numbers of employees.

Steps

1. (Optional) Use the Update Stock Grants task.

   Select the criteria based on the grants that you want to update. To see the updated values, use the Stock Grants Summary report.

   Security: *Process: Compensation Management Events* domain in the Advanced Compensation functional area.
2. Create an advanced type custom report using the *Completed Stock Grant Events* report data source. This report doesn't need to be optimized for performance. As you complete this task, consider:

Option	Description
Report Name	Update Stock Grant - MOM
Report Type	Advanced
Data Source	*Completed Stock Grant Events*. Leave the Optimized for Performance disabled.
Data Source Type	Standard
Primary Business Type	Stock Grant Event
Columns	• Business Object: Stock Grant Event • Field: Worker

3. (Optional) Use the *Update Stock Grant Events* mass operation type from the Mass Operation Management task.

   Access the Mass Operation Management task. As you complete the task, consider:

Option	Description
Mass Operation Type	*Update Stock Grant Events*.
Input Report	Select the custom report that you created.
Run Frequency	You can schedule the run, or select*Run Now*.

   Security:

   - *Mass Operation Management* in the System functional area.
   - *Process: Compensation Management Events* in the Advanced Compensation functional area.
   - rant access to the *Update Stock Grant Events* mass operation security segment. Add the segment to the existing segment-based group that includes Compensation administration with View and Modify Mass Operation Management permissions.
4. (Optional) Use the *Update Stock Grant* web service.

Next Steps
Related Information
Tasks
Steps: Manage Stock Plans and Grants on page 1109

Calculated Plans

Steps: Manage Calculated Plans for Compensation

Context

Compensation administrators can create powerful compensation plans based on customized calculations. Calculated plans can be:

- Assigned to employees like other compensation plans.
- Used as part of a compensation basis.
- Updated in the Other section in Compensation transactions and in Staffing transactions that include compensation.

Unlike other compensation plans, Workday doesn't automatically remove calculated plans with a zero value from Manage by Basis Total (MBT) employees. Workday recalculates plans with a zero value without having to reassign them.

Note: Calculations can be very complex. Workday recommends that you engage Workday Professional Services or a Workday Consulting Partner to help you configure the calculations for Compensation.

Steps

1. Create 1 or more calculations in the *Compensation* category using tasks such as:
    - Create Aggregate Calculation
    - Create Constant Value Calculation
    - Create Lookup Calculation

    Security: *Set Up: Payroll (Calculations – Generic)* in the Core Payroll functional area.

    Example: Your US federal agency uses locality pay and you access the Create Locality Pay Area task to enter a percentage for each locality pay area. You then access the Create Arithmetic Calculation task to configure a Locality Pay Calculation. You also create a calculated plan that uses your Locality Pay Calculation. Finally you assign the calculated plan to employees or positions.
2. Access the Create Calculated Plan task.
    a) Select how Workday calculates plan amounts:
        - Dynamic: Workday recalculates plan amounts based on current values whenever a compensation event occurs or you view the plan.
        - Event Driven: Workday calculates plan amounts when a compensation event occurs or when you run the *Calculated Plan Assignment Updates by Position* operation type on the Mass Operations Management task. Workday creates an event whenever a plan amount changes.

    b) (Optional) Enter a Plan Type Name Override to replace the automatically populated name.

    c) (Optional) Select the Exclude from Total Salary and Allowance Compensation Basis check box.

    Doing so excludes the calculated plan when Workday calculates the *Total Salary and Allowance* compensation basis.

    d) Select a Compensation Element to associate this plan with a payroll earning.

    e) Select a Calculation, or click Create.

    f) (Optional) Select a Target Percent Calculation, a Ceiling Amount Calculation, or both on amount-based plans.

    Given a defined Target Percent Calculation or Ceiling Amount Calculation, Workday evaluates salary-dependent plans for MBT workers when calculating the Primary Compensation Basis (PCB).

    However, Workday doesn't include calculated plans that lack a target when allocating compensation basis amounts.

    You can use these fields for reporting and in Payroll or Payroll Integration.

    g) Select 1 or more Eligibility Rules.

    Security, in the Core Compensation functional area:
    - *Set Up: Base and Plan*
    - *Add Compensation Plans: Add Calculated*
    - *Compensation Change: Calculated*
3. Run the *Calculated Plan Assignment Updates by Position* mass operation.
    - Create a custom report using the Positions for HCM Reporting data source.
    - Access the Mass Operation Management task. As you complete the task, consider:

Option	Description
Mass Operation Type	*Calculated Plan Assignment Updates by Position*.
Effective Date	The date of this event becomes effective.
As of Date	Workday evaluates the plan as it existed on this date. Example:

Option	Description
	• You have a calculated plan that calculates the number of service years * 100. • You want the amount to change on the first of the month for any employee with a service year change during that month. • You run the operation type the first day of every month and set both the Effective Date and the As of Date to March 1. • A worker with a service date of March 15 won't get a new amount because Workday evaluated the plan as it existed on March 1. To avoid this, configure an As of Date of March 31.
Input Report	Select the custom report that you created.
Run Partial Calculation	Select to perform partial calculation only for employees with calculated plan assignment changes. Workday recalculates plans with dependencies on the calculated plan. If not selected, Workday recalculates the calculated plan and adjusts the PCB.
Update Selected Calculated Plans Only	Workday updates only the selected calculated plans during calculations. Workday updates the PCB regardless if you selected Retain Basis Total on the basis.
Update Selected Calculated Plans and Dependent Plans - MBT Only	Workday updates the selected plans only if they have changes, and updates their dependent plans. However, Workday doesn't update dependent plans for non-MBT employees. Workday doesn't update dependent plans for MBT employees if the dependent plans have changes but the selected plans don't. Workday might update the PCB regardless if you selected Retain Basis Total on the basis.
Update All Compensation Plans - MBT Only	Workday recalculates all compensation plans only when 1 or more selected calculated plans have changes. Workday maintains the PCB constant, regardless if you selected Retain Basis Total on the basis.

For MBT employees, Workday updates both dynamic and event-driven plans. For non-MBT employees, Workday updates only event-driven plans. You can run this operation on a regular basis for employees, including MBT employees or those with multiple positions. You can also use this operation to calculate amounts for event-driven plans on demand.

Security:

- *Mass Operation Management* domain in the System functional area.
- Set up segment security for mass operations.

Example

Create a calculated plan to give each eligible employee a fixed amount for every year of service.

1. Access the Create Arithmetic Calculation.

   Create a calculation called Seniority Pay that multiplies Length of Service by a fixed Seniority Accrual amount set up as a Constant Value.

2. Access the Create Calculated Plan task and select Seniority Pay in the Calculation field.
3. Access the Rollout Compensation Plans to Employees task to assign your calculated plans.

Related Information

Concepts

Concept: Payroll Calculations

Concept: Delete Calculations

Concept: Calculated Fields and Calculations

Tasks

Set Up Mass Operations

Reference

Reference: Numeric Calculations

Reference: Date Calculations

The Next Level: The Calculation Engine in Compensation

The Next Level: Non-Manage Basis Total Calculated Plans

Reference: Calculations and Calculated Fields Comparison

Concept: Calculated Plans for Compensation

Compensation administrators can create powerful compensation plans based on customized calculations.

Calculations

Calculated compensation plans rely on calculations created on the Create Arithmetic Calculation, Create Conditional Calculation, or other tasks. Calculations can be simple, such as a constant value, or very complex with nested operations.

You must create calculations in the *Compensation* category to use them in Compensation. Workday recommends not modifying calculations in other categories because doing so might negatively affect other Workday product areas.

You can create calculations using a wide variety of Workday-delivered report fields and Instance Value Calculations within the *Compensation* category.

Calculated Plans

After you create calculations, use the Create Calculated Plan task to associate your calculations with plans. Calculated plans can be of 2 types, dynamic or event-driven. Each work differently depending on whether they're Managed by Basis Total (MBT):

<table>
<tr><th></th><th>Dynamic</th><th>Event-Driven</th></tr>
<tr><td>MBT</td><td colspan="2">Workday updates plan assignment amounts when:
A compensation event occurs.
You run the Calculated Plan Assignment Updates by Position operation type on the Mass Operations Management task.
Workday creates new effective-dated events each time the amount is updated.

Workday doesn't calculate a negative target percent calculation or ceiling amount calculation when the calculated plan is salary dependent.</td></tr>
</table>

	Dynamic	Event-Driven
Non-MBT	Workday updates plan assignment amounts whenever you view the plan assignment. Workday doesn't generate new compensation events when plan amounts change. You can't use the Mass Operations Management task to update plan assignment amounts. Workday is able to calculate a negative target percent calculation or ceiling amount calculation when the calculated plan is salary dependent.	Workday updates plan assignment amounts when: • A compensation event occurs. • You run the *Calculated Plan Assignment Updates by Position* operation type on the Mass Operations Management task. Workday creates new effective-dated events each time the amount is updated. Workday doesn't calculate a negative target percent calculation or ceiling amount calculation when the plan is salary dependent.

You can then:

- Assign calculated compensation plans to employees like other compensation plans.
- Use plans as part of a compensation basis.
- Use plans for MBT employees and non-MBT employees.

  Note: Calculations based on commission plans, remainder plans, or nonfixed salary plans won't be accurate for MBT scenarios.
- View or update data in the Other section in Compensation reports and transactions, and in staffing transactions that include compensation. Example: During a *Request Compensation Change* business process, Workday displays a list of compensation plans for the employee. You open the Other section to display any calculated plans assigned to the employee.

Calculated plans for MBT employees can't have dependencies on commission plans or remainder plans.

Unlike other compensation plans, Workday doesn't remove calculated plans with a zero value. Workday can recalculate zero value calculated plans when compensation transactions, or staffing transactions that include compensation, change the value.

For dynamic plans not part of the Primary Compensation Basis, Workday updates assignment amounts for MBT employees. However, Workday only changes the effective date if the event requires a recalculation.

Workday can't process salary-dependent calculated plans that:

- Use a subtractive calculation compensation basis and a salary plan.
- Use a guaranteed calculation compensation basis for MBT workers.
- Include plans with a ceiling and maximum salaries that don't equal 100%.
- Include plans without a target percent in the calculated plan and where the compensation element is in a base pay group.

Calculated Plan Assignment Updates by Position

For MBT employees, Workday updates calculated plans when performing top-down calculations. You can also update calculations on a schedule using the Mass Operation Management task.

Create a calculated plan that adds a fixed amount to the salary of each employee for every year of service. Use the Create Arithmetic Calculation task to create a calculation that multiplies years of service (using a Workday-delivered report field) by a fixed Accrual amount set up as a Constant Value. Then use the Mass

Operation Management task and the *Calculated Plan Assignment Updates by Position* operation type to update these employees once each year.

Related Information
Concepts
Concept: Payroll Calculations
Concept: Delete Calculations
Concept: Calculated Fields and Calculations
Tasks
Create Calculations
Reference
Reference: Boolean Calculations
Reference: Numeric Calculations
Reference: Date Calculations
The Next Level: Non-Manage Basis Total Calculated Plans
Reference: Calculations and Calculated Fields Comparison

Locality Pay

Steps: Set Up Locality Pay Areas

Prerequisites

Security: *Set Up: Locality Pay* domain in the Core Compensation functional area.

Context

A locality pay area in Workday consists of 1 or more locations that share a percentage cost-of-living adjustment to base pay. You can use the percentage when calculating compensation plans. When an unfilled position is eligible for 2 locality pay areas, Workday uses the greater of the 2 percentages. You can assign locations only to 1 locality pay area.

Steps

1. Access the Create Locality Pay Area task.

   Assign a percentage for the base pay adjustment and select locations for the locality pay area.
2. Access the Create Arithmetic Calculation task.

   Configure a locality pay calculation.
3. Assign the locality pay calculation to a compensation plan.

   See Steps: Manage Calculated Plans for Compensation on page 1118.
4. Roll Out Compensation Plans to Employees on page 1027.

Next Steps

Run the Active Locality Pay Areas report to view a complete list of active locality pay areas.

Related Information
Reference
2022R2 What's New Post: Locality Pay Areas

Concept: Locality Pay Areas

When you set up locality pay areas in Workday, you can group multiple work locations into an area and assign a percentage of additional base pay to it. Example: You can group employees in San Francisco and Los Angeles into the locality pay area for California. Then, you can configure that area to add 25 percent to their base pay.

You can leverage the locality pay area percentage in calculated compensation plans.

Using locality pay areas is helpful when you:

- Have set base salaries for identical positions within given compensation grades and steps.
- Have multiple work locations with different costs of living or other unique attributes.
- Use multiple complex calculations to determine additional base pay by location.

This feature is available for all customers.

Related Information
Reference
2022R2 What's New Post: Locality Pay Areas

One-Time Payment Plans

Steps: Set Up and Manage One-Time Payments

Prerequisites

Set up compensation elements and eligibility rules.

Context

You can use one-time payments for:

- Referral bonuses.
- Retention incentives.
- Severance payments.
- Signing bonuses.

You can also access these web services:

- *Get One-Time Payment Plans*
- *Put One-Time Payment Plan*
- *Request One-Time Payment*

Steps

1. (Optional) Access the Create One-Time Payment Plan Configurable Category task.

   You can create categories for one-time payments for informational or reporting purposes. You can use these Workday-delivered categories:

   - *Referral* for rewarding employees that refer successful new hires.
   - *Clawback* to enable the tracking of a clawback date on one-time payment processes. See: Concept: Forfeit and Clawback for Terminated Workers on page 1132.

   Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.

2. (Optional) Access the Create One-Time Payment Plan Schedule task.

   Select a number and a unit for each schedule you create.

   Example: Create a schedule called *Retention Bonus* with Number set to 2, Unit set to Year, and From Date set to *Scheduled Payment Date*. If you select *Retention Bonus* in an amount-based plan with Category set to *Clawback*, you can recover the bonus up to 2 years after the Scheduled Payment Date.
   Example: Create a schedule called *Wait Period* with a Number of 3 and a Unit of Months. If you select *Wait Period* on an amount-based plan with Category set to *Referral*, Workday pays when the employee serves 3 months beyond the Hire Date.

   Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.
3. (Optional) Access the Edit Tenant Setup - HCM task.

   Select the Route Business Processes Based on Costing Overrides option in the Compensation section. If you use worktags on these business processes:

   - *Request One-Time Payment*
   - *Request One-Time Payment Offer/Employment Agreement*

   Workday routes steps to the managers associated with the worktags.

   You can optionally select the Data Entry Check Options > Select areas to switch on Data Entry Check > Request One-Time Payment - OTP Amount item on the Edit Tenant Setup - HCM task. Doing so enables Workday to validate the data you enter for the one-time payment amount. If the numeric value you enter is a statistical outlier, Workday displays a validation message. Outliers are determined from historical entries of the one-time payment plan type. See: ../../../manage-workday/tenant-configuration/tenant-setup/dan1370797339945.dita

   Consider selecting the Enable Multiple One-Time Payments check box on the Edit Tenant Setup - HCM task. If not selected:

   - You can only configure 1 one-time payment for each event.
   - Workday prevents you from adding a one-time payment during the *Termination* process if the employee has a clawback payment.

   Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.
4. Create One-Time Payment Plans on page 1126.
5. (Optional) Access the Maintain Custom Validations report to configure custom validations for one-time payments.

   Custom validations enable you to warn or prevent users from submitting one-time payments with invalid data combinations. You can also specify one-time payment plans within the conditions of your custom validation.

   We recommend not making configuration changes to custom validations while there are one-time payments in progress.

   Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.
6. (Optional) Access the Maintain Event Categories and Reasons task.

   You can enable the selection of reasons by manager role-based security group when requesting a one-time payment. To do so, select Manager Reason for the *Request One-Time Payment* business process, and the applicable reason code

   Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.

7. (Optional) Access the Configure Optional Fields task.

   You can hide or require most fields delivered as optional on these business processes:

   - *Request One-Time Payment*.
   - *Request One-Time Payment for Self*
   - *Request One-Time Payment Offer/Employment Agreement*.
   - *Request Referral Payment*.

   Changes made to optional fields apply to all:

   - Payments that are part of the event.
   - Events already in progress and all those in the future.

   Note: Any fields configured as hidden or required applies even when the business process is used as a subprocess of another business process.

   Security: *Set Up: Configure Optional Fields* domain in the System functional area.
8. (Optional) Add one-time payment business processes as steps on the *Offer*, *Hire*, or *Change Job* business processes.

   If you include *Request One-Time Payment* as a subprocess of *Offer* as a signing bonus, Workday recommends adding it to both *Hire* and *Change Job* too. Doing so ensures that any one-time payment included with an offer carries forward into *Hire* and *Change Job*.

   If you plan to use *Request One-Time Payment Offer/Employment Agreement* as a subprocess of *Offer*, consider configuring your one-time payment plans with eligibility rules based on job requisition attributes.

   You can automate referral bonuses by:

   - Creating referral payment plans.
   - Associating referral payment plans to job requisitions or job profiles.
   - Adding the *One-Time Payment for Referral* subprocess to the *Hire* business process.
9. Request One-Time Payments for Employees on page 1129.
10. (Optional) Steps: Enable Self-Service One-Time Payments on page 1131.

Related Information

Tasks

Steps: Set Up Referrals on page 437

Steps: Set Up Referral Payment Processes on page 441

Create and Edit Job Requisitions on page 611

Steps: Set Up Compensation Components on page 979

Configure Custom Validation Messages

Steps: Enable Self-Service One-Time Payments on page 1131

Create One-Time Payment Plans

Prerequisites

- Set up compensation components and grades.
- Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.

Context

You can create one-time payment plans and use them for:

- Referral bonuses.
- Retention incentives.
- Signing bonuses.

- Severance pay.

After you create one-time payment plans, you can assign them to employees.

Steps

1. Access the Create One-Time Payment Plan task.
2. (Optional) Select the Enable Coverage Dates check box to display the Coverage Dates section on the Request One-Time Payment task.

   Coverage dates enable Workday Payroll or Payroll Integration to associate dates with the one-time payment for US Fair Labor Standards Act (FLSA) reporting requirements.
3. (Optional) Select a Category.

   Workday delivers these categories:

Option	Description
Clawback	If selected, Workday displays the Clawback Payment Options section and enables the Clawback Date field on any *Request One-Time Payment* process configured using this plan.
Referral	For use with amount-based employee referrals only. To add the *One-Time Payment for Referral* step to the *Hire* business process, you must add the *Referral* category. One-time payment plans that use the *Referral* category aren't available for use in other business processes.

   You can create additional categories for reporting and sorting purposes on the Create One-Time Payment Plan Configurable Category task.
4. (Optional) Configure the Clawback Payment Options section.

   This is only available if you selected the *Clawback* category.

Option	Description
Clawback Schedule	Select a schedule created with the Create One-Time Payment Plan Schedule task. Example: Create a schedule called *Retention Bonus* to recover the bonus up to 2 years after the Scheduled Payment Date. Workday populates the Clawback Date on any *Request One-Time Payment* process configured with this plan. You can access the One-Time Payments Eligible for Clawback report to display one-time payments with a clawback date that occurs after the worker's termination date.
Clawback Calculation	Select a calculation created in the Compensation category on tasks such as Create Arithmetic Calculation and others to assist in calculating an amount for clawback during the worker's termination process. You can use Workday-delivered calculations as a starting point, such as: • Recommended Clawback Percent based on Length of Employment. • Recommended Clawback Percent based on Scheduled Payment Date.
5. (Optional) Configure Referral Payment Options.

   This is only available if you selected the *Referral* category.

Option	Description
Payment Schedule	(Optional) Select a schedule created with the Create One-Time Payment Plan Schedule task.

Option	Description
	Example: Create a schedule called *Wait Period* to hold payment for 3 months after the hire date. If not selected, Workday pays the referral bonus on the hire date.
Cost to New Hire Organizations	(Optional) Select to charge the referral to the hiring organizations during the *Hire* process. If selected, Workday: • Automatically populates worktags with relevant organization assignments from the referrer and hiring organizations. • Displays the organization assignments for both the new hire and referrer.

6. In the Defaults section, consider:

Option	Description
Compensation Element	If you select a compensation element with a gross up earning, Workday automatically selects the Gross Up check box.
Target Amount	Enter the amount to pay to the employee. For a gross up earning, enter the desired net payment.
Target Percentage	Enter the percentage of total base pay used to calculate the payment amount. For a gross up earning, enter the percentage for the desired net payment.
Currency	Enter the currency for the payment.
Reference Frequency	Select the frequency for Workday to use when calculating the payment amount. Example: • Total base pay for Leslie is 125,000. • You select 10 percent for the Target Percentage. • You select *Quarterly* for the Reference Frequency. Workday calculates the payment amount: 125,000 * 0.10 * 0.25 = 3,125, or 10 percent of one quarter of the total base pay.
Recommended Minimum / Recommended Maximum	Select values to serve as guidelines for the manager requesting the one-time payment. Managers can enter values outside of the range.

7. In the Plan Eligibility section, select 1 or more eligibility rules.

   For referral plans, eligibility rules can use report fields on the hired worker and the referral to determine eligibility.
8. (Optional) Select 1 or more Worktags configured on the Maintain Worktag Usage task for integration with Workday Payroll or a third party payroll integration.

   You can't select worktags if you selected the Cost to New Hire Organizations check box.

9. (Optional) Set up 1 or more profiles in the One-Time Payment Plan Profiles section if you want multiple plan targets.

   If you're defining the plan to have multiple targets, the One-Time Payment Plan Profiles section enables you to create a single plan for what are effectively multiple plans.

   Example: You can set up 1 profile where the target for individual contributors is 500 USD and the target for directors is 1000 USD.

Next Steps

You can hide the compensation plan type from specified groups of workers using the *Worker Data: Compensation Plan Type* domain in the Core Compensation functional area.

Related Information

Concepts

Concept: Compensation Elements and Payroll Processing

Tasks

Roll Out Compensation Plans to Employees on page 1027

Roll Out Compensation Plans to Employees on page 1027

Steps: Set Up Referral Payment Processes on page 441

Request One-Time Payments for Employees

Prerequisites

- Configure the *Request One-Time Payment* business process for your organizations.
- Configure the *Request One-Time Payment Offer/Employment Agreement* business process if you use the Workday Recruiting *Offer* business process.

  If using Consolidated Tasks for *Offer*:

  - Select the Consolidate Tasks check box on the business process security policy.
  - Configure modify access on the *Candidate Data: One-Time Payment Offer* domain in the Core Compensation functional area.
- Set up primary or required worktags with the Maintain Worktag Usage task to integrate with Workday Payroll or Payroll Integration.
- Security: *Request: One-Time Payment* in the Core Compensation functional area.

Context

You can request a one-time payment for an employee when:

- You access the Request One-Time Payment task for a referral bonus, a retention incentive, or for another reason.
- You've included the *Request One-Time Payment* business process as a step in business processes such as *Offer*, *Hire*, *Change Job*, or *Termination*.

You can also use the *Request One-Time Payment* web service.

Steps

1. Access the Request One-Time Payment task.
2. (Optional) Select an Employee Visibility Date.

   If configured, Workday hides updated pay-related compensation data from the worker until the date. If left blank, Workday uses the effective date. See: FAQ: Employee Visibility Date on page 1191.
3. (Optional) Select Add to configure the one-time payment.
4. Select a One-Time Payment Plan.

5. (Optional) Select 1 or more Worktags to integrate with Workday Payroll or Payroll Integration.

   For more control of payroll expense reporting, you can configure related worktags on the Maintain Related Worktag Usage task. See: ../../../manage-workday/user-experience/worktags/baj1561753561443.dita.Example: Configure Cost Center as a related worktag for one-time payments.

   If you use worktags, you can also enable the Route Business Processes Based on Costing Overrides option in the Compensation section on the Edit Tenant Setup - HCM task. Doing so enables Workday to route business process steps to the managers associated with the worktags.
6. (Optional) Select a Costing Company.

   Workday overrides the default company and charges the one-time payment to the company you select.

   This only displays if you selected the Intercompany Accounting - Enable check box in the Payroll Accounting section on the Edit Tenant Setup – Payroll task. See: ../../../manage-workday/tenant-configuration/tenant-setup/dan1370796805364.dita.
7. Select a Scheduled Payment Date greater than the Effective Date.

   This only displays if you selected the Enable Multiple One-Time Payments check box in the Compensation section on the Edit Tenant Setup - HCM task. See: ../../../manage-workday/tenant-configuration/tenant-setup/dan1370797339945.dita.

   When using multiple one-time payments, the Scheduled Payment Date can differ for each payment.

   Workday processes the one-time payment in the on-cycle payroll calculation for the pay period that includes the Scheduled Payment Date.
8. (Optional) Select a Coverage Start Date and Coverage End Date.

   The Coverage Period section only displays if you selected Enable Coverage Dates on the one-time payment plan. Coverage dates enable Workday Payroll or Payroll Integration to associate dates with the one-time payment for US Fair Labor Standards Act (FLSA) reporting requirements.
9. Select the Send to Payroll check box for Workday Payroll or Payroll Integration to process the payment.

   Otherwise, Workday doesn't process the payment.

   With Send to Payroll selected, the Forfeit check box displays during terminations for both one-time and bonus payments under certain conditions. See: Concept: Forfeit and Clawback for Terminated Workers on page 1132.

   If you select Forfeit, Workday forfeits the payment, overriding Send to Payroll, and won't pay the one-time or bonus payment.

   If the pay group detail is locked, then the one-time payment may be delayed until the next payroll cycle.
10. Select a Clawback Payments option:

Option	Description
Do Not Clawback	If selected, Workday still creates the clawback payment for reporting purposes, but takes no other action. Use this option if you don't plan on recovering the payment.
Send to Payroll	If selected, Workday processes the clawback payment through Payroll on the Scheduled Clawback Date.
Recover Manually	Select this if you intend to recover the one-time payment manually, outside of Workday.

Related Information

Concepts

Concept: Compensation Elements and Payroll Processing

Concept: Off-Cycle Payments

Tasks

Add Worklets to Business Processes on page 2969
Maintain Worker Documents on page 106
Attach Documents to a Business Process Step
Steps: Set Up and Manage One-Time Payments on page 1124
Steps: Set Up Task Consolidation for Offers on page 493
Steps: Set Up Referral Payment Processes on page 441

Reference

FAQ: Payroll Input
FAQ: Employee Visibility Date on page 1191

Steps: Enable Self-Service One-Time Payments

Context

You can enable workers to request one-time payments for themselves using the *Request One-Time Payment for Self* business process.

Steps

1. Edit Business Process Security Policies.

   Access the Create Business Process Definition (Default Definition) task and create a default definition and security policy for the *Request One-Time Payment for Self* business process type.

   Give security groups access to the *Self-Service: Request One-Time Payment* domain in the Core Compensation functional area.
2. Hide or Require Optional Fields.

   Access the Configure Optional Fields task and select Core Compensation > Request One-Time Payment for Self from the By Functional Area prompt.

   Workday permanently hides these fields from the worker during the *Request One-Time Payment for Self* business process:

   - Coverage Dates
   - Gross Up
   - Recommended Maximum
   - Recommended Minimum
   - Send to Payroll
   - Target Amount
   - Target Currency
   - Target Frequency
   - Target Percent
3. Access the Maintain Custom Validations report to configure custom validations for one-time payments.

   Existing custom validations for the *Request One-Time Payment* process also apply to the *Request One-Time Payment for Self* process. Use the *One Time Payment Event for Self* source external field to exclude these types of events from specific custom validations.

   Configure any custom validations that your organization requires. Consider adjusting any custom validations that you use only for the *Request One-Time Payment* event.
4. Select the Worker Selectable check box on one-time payment plans to enable them for self-service.

   Doing so enables the plan for selection during the *Request One-Time Payment for Self* business process, provided the worker is eligible for the plan. If you don't select Worker Selectable, workers can't select the plan during the *Request One-Time Payment for Self* process.

Result

Workers with the appropriate security can access the Request One-Time Payment for Myself task to initiate the *Request One-Time Payment for Self* business process. Workers can also access the task from the Benefits and Pay Hub.

Workers can cancel their one-time payment request but only while it's still in progress. Workers can't correct or rescind their own *Request One-Time Payment for Self* process after it completes, regardless of the business process security policy.

Related Information

Reference

Reference: Benefits and Pay Hub on page 1060

2022R2 What's New Post: Self-Service for One-Time Payments

Concept: Forfeit and Clawback for Terminated Workers

Workday provides the ability to forfeit and claw back one-time payments to terminated workers processed through Workday Payroll or Payroll Integration.

Workday Payroll only processes the one-time payment when you select the Send to Payroll option on the Request One-Time Payment task. With Send to Payroll selected, the Forfeit option displays during terminations for both one-time and bonus payments only when both:

- You have configured *Request One-Time Payment* as a step in the *Termination* business process.
- The Scheduled Payment Date on the one-time or bonus payment is after the Termination Date.

  The worker still has the primary position as when you configured the one-time or bonus payment. Workday only displays those one-time or bonus payments associated with the current position. Workday doesn't display a payment if the worker changes jobs or gets a new primary position after you configured the payment.

  Example: Terry has a one-time payment associated with their current position, but also has another associated with their old position. During the termination process for Terry, Workday displays only the one-time payment associated with Terry's current position.

If you select Forfeit, Workday forfeits the payment, overriding Send to Payroll, and won't pay the one-time or bonus payment.

You can also claw back one-time payments. The Clawback section displays only when 1 or more of the worker's one-time payments meet these criteria:

- You selected the *Clawback* category on the one-time payment plan.
- You selected Send to Payroll.
- The Clawback Date on the one-time payment is after the worker's Termination Date.
- The Scheduled Payment Date is on or before the Termination Date.
- The worker still has the primary position as when you configured the one-time or bonus payment. Workday only displays those one-time or bonus payments for clawback associated with the current position. Workday doesn't display a payment for clawback if the worker changes jobs or gets a new primary position after you configured the payment.

Related Information

Tasks

Steps: Enable Self-Service One-Time Payments on page 1131
Request One-Time Payments for Employees on page 1129

Compensation Basis

Steps: Manage Compensation Basis

Steps

1. (Optional) Create Compensation Rounding Rules on page 1165.
2. Create Configurable Compensation Basis on page 1134.
3. (Optional) Create Calculation Compensation Basis on page 1136.
4. (Optional) Access the Map Retirement Savings Plans to Compensation Basis task.

   For Workday to calculate the employer contribution amount based on a percentage of the employee's salary, identify the compensation basis that defines the components that make up the employee's salary. Otherwise, Workday can't calculate the employer contribution amount and the compensation basis amount is zero.

   If the plan is part of a compensation basis that has the Manage Basis Total check box selected, you can't change the selected compensation basis.

   Security: *Set Up: Base and Plan* and *Worker Data: Total Rewards* domains in the Core Compensation functional area.
5. (Optional) Access the Set Up Compensation Basis Adjustment task.

   Adding or changing a rounding rule on an existing compensation basis applies only to future compensation transactions, but not the existing Primary Compensation Basis (PCB). After you've added or changed a rounding rule on an existing compensation basis, use this task to apply it to employee's existing PCB.

   You can select all workers that have the compensation basis, select 1 or more eligibility rules, or select 1 or more specific employees.

   Security: *Process: Compensation Plan Employee Management* domain in the Core Compensation functional area.
6. Associate compensation bases with percent-based compensation plans, such as allowance, period salary, bonus, or stock plans:

   Workday uses this to calculate the employee's individual target amounts. Workday uses individual target amounts to calculate pool amounts.
7. (Optional) Access the Model Allocation by Compensation Basis report.

   For workers managed by a compensation basis, simulate the changes that result from business processes such as *Change Job*, *Change Position*, *Hire*, or *Request Compensation Change*.

   Note: Workday doesn't display data unless the business processes would change it.
8. (Optional) Manage merit awards using a compensation basis.
   a) Create Compensation Packages on page 1044

      To assign a compensation basis to the compensation package, complete the Compensation Basis tab.
   b) Create Merit Plans on page 1088

      Select the Manage Basis Total check box.

   Workday allocates merit increases during a compensation change, job change, promotion, transfer, or demotion to the compensation plans associated with the compensation basis.
9. (Optional) Create Compensation Rounding Rules

   You can associate rounding rules with allowance, salary, merit, bonus, or stock plans, or with compensation bases managed by a compensation basis total.

   Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Related Information

Concepts

Concept: Compensation Basis on page 1137

Tasks

Steps: Set Up Eligible Earnings Overrides for Bonuses on page 1093
Edit Domain Security Policies
Steps: Manage Stock Plans and Grants on page 1109
Steps: Set Up Merit Plans on page 1088
Steps: Set Up Bonus Plans on page 1092
Create Compensation Packages on page 1044
Create Period Salary Plans on page 1072
Create Allowance Plans on page 1082

Create Configurable Compensation Basis

Prerequisites

- Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.
- Create compensation plans.

Context

You can create a compensation basis from 1 or more compensation plans. You can then use the basis to manage merit awards and assign or change employee compensation.

You can also use these web services to retrieve, add, or modify configurable compensation bases:

- Get Configurable Compensation Basis.
- Put Configurable Compensation Basis.

Note: You can't use these web services to retrieve or upload configurable compensation bases with Manage by Basis Total selected. Use the Create Configurable Compensation Basis task instead. You also can't use these web services for calculation compensation bases. Use the Create Calculation Compensation Basis task instead.

Steps

1. Access the Create Configurable Compensation Basis task.
2. In the Details section, consider:

Option	Description
Eligibility Rule	Select 1 or more eligibility rules to apply the compensation basis only to specific employees. If you leave the field blank, the compensation basis applies to all employees.
Functional Areas	Select 1 or more: • *Benefits*: If you're going to include a retirement savings plan. • *Compensation*: If you want to use it in compensation-related transactions or in the severance worksheet. • *Planning*: If you want to create a custom compensation basis for your headcount plans. (Requires access to the Workday Planning product.)

Option	Description
	• *Projects and Work*: (For Projects only.) If you want to use this compensation basis to derive a fully burdened cost rate for worker on a project.
Use to View Compensation	Available only if you selected *Compensation* in the Functional Areas field. If selected: • Configurable Compensation Basis displays on the worker's related actions menu. • Compensation Basis is available for percentage-based plans such as bonus or allowance.
Ranking	Available only if you selected *Compensation* in the Functional Areas field. If an employee is eligible for more than 1 compensation basis, Workday: • Calculates the amount using the highest ranking compensation basis, known as the Primary Compensation Basis (PCB). • Uses the PCB for reporting estimated earnings. Example: Sam is eligible for compensation bases with Ranking set to 2, 3, and 4. Sam isn't eligible for the compensation basis ranked 1. The compensation basis ranked 2 is the highest Sam is eligible for and is the PCB.
Compensation Plan	• *All*: All compensation plans of the same type included in the calculation of the compensation basis. • *Base Pay Only*: Includes all compensation plans of the same type in the calculation of the compensation basis, provided the compensation element selected on the plan is part of the employee's compensation grade as a base pay element.

3. In the Manage Basis Total section, consider:

Option	Description
Manage Basis Total	If selected, you can manage the change to an employee's compensation as a total compensation amount. Workday distributes the change to the components that make up the compensation basis.
Salary Plans Maximum	Example: If an employee's total compensation amount is 100,000 USD and the Salary Plans Maximum is 30 percent, then the amount allocated to salary plans can't be greater than 30,000 USD.

Option	Description
Rounding Rule	Workday rounds compensation plan assignment amounts for all future compensation transactions. A rounding rule created using the Create Compensation Rounding Rule task with the Round to Currency Precision check box selected provides the most precise results. Discrepancies between the original PCB entered and what is displayed after plan allocation might result from unit-based plans that include a payment frequency. Example: If the total compensation basis equals 200,000 USD, the displayed value of the total compensation basis might be rounded down to 199,999.10 USD if the 2 unit-based allowance plans are: • Rounded to currency precision. • Paid quarterly.
Retain Basis Total	If selected, Workday retains the compensation basis total even when a staffing transaction changes compensation plan assignment. Example: If Retain Basis Total is selected, Workday populates the proposed total with the existing compensation basis total during the *Propose Compensation* step of the *Change Job* process. Workday then rebalances the plan assignments but keeps the compensation basis total fixed. If Retain Basis Total isn't selected, Workday recalculates the compensation basis total based on the changed plan assignments.

Include an amount-based allowance, bonus, stock, or commission plan that allows overrides to handle any remainder amounts from Workday's automatic distribution. Otherwise, Workday can't allocate the full amount of the change to the employee.

4. (Optional) Select Calculation Bases created on the Create Calculation Compensation Basis task.
5. Complete the information for each plan you want to include in the compensation basis.

Next Steps

If you edited an existing compensation basis and added or changed a rounding rule with Manage Basis Total selected, you can use the Set Up Compensation Basis Adjustment task to apply the rule to existing plan assignment amounts.

Related Information
Tasks
Create Compensation Rounding Rules on page 1165

Create Calculation Compensation Basis

Prerequisites

- Create compensation plans.
- Security: *Set Up: Base and Plan* domain in the Core Compensation functional area.

Context

You can use a calculation compensation basis to augment a compensation basis used to support global operations.

Steps

1. Access the Create Calculation Compensation Basis task.
2. Select the type:

Option	Description
Adjustable Basis	Comprised of variable and guaranteed plans that Workday might adjust during the calculation.
Guaranteed Basis	Comprised of plans, the sum of which is guaranteed for the worker. Workday can only decrease the guaranteed amount when the worker's Primary Compensation Basis (PCB) amount decreases.
Subtractive Basis	Associated with a percentage-based compensation plan. Workday decreases the PCB by the amount defined by the subtractive basis. Workday then calculates the percentage-based plan target amount.
Variable Basis	Defines the variable amount of the compensation basis and can include: • Plans that decrease when you must add funds to the guaranteed plans to preserve the guaranteed amount. • Plans that you adjust in inverse proportionality to the amount needed to fund the guaranteed amount.
Fixed Basis	Includes fixed compensation plans that Workday won't change during Manage by Basis Total calculations, even if you selected Retain Basis Total. Workday treats the compensation plans you select as a higher priority than maintaining the PCB.

3. (Optional) Select the Compensation Plans that make up the calculation compensation basis.

Result

You can select calculation compensation bases created on the Create Calculation Compensation Basis task. You can select subtractive calculation compensation bases when creating or editing a percentage-based compensation plan.

Next Steps

- Create a compensation basis associated with a calculation compensation basis.

  Note: If Apply FTE % is selected on both the calculated compensation basis and on the salary or allowance plan, Workday applies the FTE % twice. Example: If a calculation compensation basis has Apply FTE % selected and includes an allowance plan that also has it selected, Workday prorates the allowance plan twice.
- View Calculation Compensation Basis, Edit Calculation Compensation Basis or Delete Calculation Compensation Basis tasks.

Concept: Compensation Basis

A compensation basis groups together compensation components that define estimated earnings for employee populations.

Examples:

- On Target Earnings US: Includes salary plans, commission plans, bonus plans.
- On Target Earnings UK: Includes salary plans, allowance plans, commission plans, bonus plans.
- Cost to Company: Includes salary plans, allowance plans, and bonus plans.

Workday uses the value associated with the grouped compensation components:

- As the basis for percentage-based allowance, bonus, period salary, and stock plans; and compensation packages.

  Example: You can define an allowance plan to be 10 percent of total cost to company.
- To define how Workday manages merit changes for an employee, or other processes that change compensation.

  You can either change an employee's compensation at the individual plan level or manage by basis total (MBT). If you use MBT, Workday automatically distributes the new total amount across the plans that make up the compensation basis.

Workday delivers 3 compensation bases:

- *Total Base Pay*: Includes all salary and allowance plans defined as base pay for the compensation grade or grade profile.
- *Total Salary and Allowances*: Includes these plans assigned to a position:
  - Allowance plans.
  - Calculated plans.
  - Salary plans.
  - Period salary plans.
  - Unit salary plans.
  - Hourly plans.
- *Eligible Earning Override*: For bonus plans and processes only. Includes customer-defined currency amounts at the employee level used as the basis for bonus calculations.

For employees eligible for more than 1 compensation basis, Workday calculates the amount using the highest ranking basis, called the Primary Compensation Basis (PCB). Workday uses the PCB for reporting estimated earnings.

You can configure and manage your compensation bases, including the Ranking, on these tasks:

- Create or Edit Configurable Compensation Basis
- Create Calculation Compensation Basis
- Maintain Compensation Basis

See: Steps: Manage Compensation Basis on page 1133

You can then view the compensation basis value for employees using reports and processes such as the Compensation Basis Analytics report.

Manage Basis Total (MBT)

Managing employees by a compensation basis total simplifies the management of diverse, interrelated compensation components common for companies that operate globally. Rather than updating several individual plans from the bottom up, managing by a basis total enables you to update a single value from the top down. Workday then redistributes the total across the individual plans that comprise the basis. See:FAQ: Manage Basis Total (MBT) on page 1140

For compensation review processes, select the Manage Basis Total check box on the merit plan. If these conditions are met, when you enter 120,000 USD as the merit increase, Workday distributes this sum in this order:

1. Applies the award to amount-based compensation plans that don't allow overrides.
2. Applies the award to percent-based compensation plans.
3. Applies the award to amount-based compensation plans that allow overrides.
4. Workday applies any remainder amount to the compensation plans that allow overrides.

Note: If your plan doesn't allow overrides, Workday doesn't distribute the full amount.

Calculation Compensation Basis

A calculation compensation basis augments a compensation basis and is used primarily in support of global operations. A calculation compensation basis can be of these types:

Calculation Compensation Basis Type	Description
Adjustable Basis	Comprised of variable and guaranteed plans that Workday adjusts during the calculation.
Guaranteed Basis	Comprised of plans, the sum of which is guaranteed for the worker. Workday can only decrease the guaranteed amount if the worker's PCB amount decreases. Workday won't exceed a ceiling set on a percentage-based allowance plan.
Subtractive Basis	Associated with a percentage-based compensation plan. Workday decreases the PCB by the amount defined by the subtractive basis. Workday then calculates the percentage-based plan target amount.
Variable Basis	Defines the variable amount of the compensation basis. A variable basis can be made up of: • Plans that Workday decreases when funds must be added to the guaranteed plans to preserve the guaranteed amount. • Plans that Workday adjusts in inverse proportionality to the amount needed to fund the guaranteed amount.

Workday uses adjustable, guaranteed, and variable calculation compensation bases as parameters when calculating the compensation basis.

You manage calculation compensation bases with the Create Calculation Compensation Basis, Edit Calculation Compensation Basis, and Delete Calculation Compensation Basis tasks. Use the Create Configurable Compensation Basis or Edit Configurable Compensation Basis tasks to associate calculation compensation bases with a compensation basis.

To use a subtractive compensation basis, you must edit a percentage-based compensation plan to include it. Workday decreases the PCB by the amount defined by the subtractive basis. Workday then calculates the percentage-based plan target amount.

Managing employees with a compensation basis linked with a calculation compensation basis changes how Workday calculates plans.

Guaranteed Basis Example: Company A is located in France. The vacation premium is a guaranteed amount and part of the collective agreement. Within Workday, this guaranteed amount can never be reduced unless the employee is demoted. The guaranteed vacation premium amount remains in place through compensation changes while the collective agreement remains valid for the employee.

To guarantee the amount remains in place in Workday:

- Create a guaranteed calculation compensation basis.
- Add the vacation premium plan to the guaranteed compensation basis.
- Associate the guaranteed calculation compensation basis with the worker's PCB.

Subtractive Basis Example: A bonus plan defined as a percentage of the PCB minus commissions.

Variable Basis Example: Sales Incentive plans.

Related Information
Tasks
Steps: Manage Compensation Basis on page 1133

Reference

The Next Level: Compensation Series: Manage Basis Total

FAQ: Manage Basis Total (MBT)

What is Manage Basis Total (MBT)?

What's the difference between MBT and non-MBT compensation?

Why should I use MBT?

Why should I use non-MBT compensation instead of MBT?

How difficult is it to switch from MBT back to non-MBT compensation?

How does Workday calculate MBT?

What happens when a grade step changes for an MBT worker?

When does Workday calculate MBT?

How does Workday calculate non-MBT compensation?

What is a partial calculation and when is it used?

Can I use MBT if I must provide a guaranteed amount?

Does Workday persist updated compensation basis values when using MBT?

If I use MBT, does it apply to all workers?

What are some best practices for implementing MBT?

<table>
<tr><td>What is Manage by Basis Total (MBT)?</td><td>Managing employees by a compensation basis total (MBT) simplifies the management of diverse, interrelated compensation components common for companies that operate globally. MBT is a method to manage total cash compensation through 1 overall value rather than multiple values at the plan level. Example: During a compensation transaction, you update the employee MBT value and Workday allocates the changed value to all the compensation plans that comprise the compensation basis.</td></tr>
<tr><td>What's the difference between MBT and non-MBT compensation?</td><td>It's an entirely different method of managing compensation. Whether to use MBT is as important a decision as selecting a staffing model. While MBT enables you to update 1 value, non-MBT compensation requires that you individually update the value of every compensation plan that makes up the compensation basis.
<table>
<tr><td>MBT</td><td>Update 1 value. Workday allocates the change from the top down to all compensation plans that comprise the basis.</td></tr>
<tr><td>Non-MBT Compensation</td><td>Update the value of the compensation plans that comprise the basis from the bottom up.</td></tr>
</table></td></tr>
</table>

Why should I use MBT?	It’s much easier to manage a single value than to manage a diverse and complicated set of compensation components and their interdependencies. This is especially true for multinational corporations with multiple compensation components and dependencies on country-specific regulations, employment agreements or union contracts, and company policies. Implementing MBT: • Enables you to enter a single total compensation amount. • Configures Workday to allocate the total among the compensation plans that comprise the basis. • Enables managers to use a single point of entry to manage complex compensation events. • Workday persists an assignment amount and currency for every plan type for each assignment. A compensation event must take place to update the assigned amounts.
Why should I use non-MBT compensation instead of MBT?	We don't recommend using MBT if you have employees with fixed compensation components or have assigned compensation plans that must be managed directly. With non-MBT compensation: • You must enter amounts for each individual compensation plan that comprise the basis, or let Workday automatically populate values based on the plan configuration. • You must understand the details and the dependencies of complex compensation configurations. • Workday calculates individual assignment amounts dynamically every time you view or report on an employee's compensation, based on the current state of compensation.
How difficult is it to switch from MBT back to non-MBT compensation?	You must run a Mass Operation Management task that converts stored data for workers that have a Primary Compensation Basis (PCB) with MBT. However, after the conversion, workers may have different total compensation amounts due to the difference in how Workday calculates amount-based and percent-based compensation plans. Workday recommends that you carefully analyze when deciding to switch back to non-MBT compensation from MBT.
How does Workday calculate MBT?	Rather than updating several individual plans, MBT enables you to update a single value. Workday then

allocates the total across the individual plans, using this this sequential calculation:

Group	Description
1	Fixed amount plans.
2	Percentage plans, based on the PCB.
3	Percentage plans based on Groups 1 and 2, and any of their dependent plans.
4	Salary plans.
5	Percentage plans based on Groups 1 through 4, and any plans dependent upon the salary plans.
6	Remainder plans, which include amount plans that allow individual overrides.

The resulting changes to individual compensation amounts comprise a single compensation event.

During a compensation review process, you can change an employee's total compensation by changing their PCB. Workday automatically allocates that amount to the compensation plans that make up the PCB, provided it:

- Has the Manage Basis Total section completed.
- Is associated with the employee's compensation package.
- Is the PCB for the employee. Example:
    - You have CompBasis A with a ranking of 1, CompBasis B with a ranking of 2, and CompBasis C with a ranking of 3.
    - Based on the eligibility rules associated with each compensation basis, an employee qualifies for CompBasis B and CompBasis C.
    - Because the ranking for CompBasis B is higher than CompBasis C, the employee's PCB is CompBasis B.

What happens when a grade step changes for an MBT worker?

For employees with grade steps managed by a compensation basis total, Workday treats salary plans differently depending on whether they allow overrides. When a grade step changes:

- If the Allow Override option isn't selected on the salary plan step, Workday treats the salary increase associated with a step change as a fixed amount and doesn't alter it.
- If the salary plan does allow overrides, Workday allocates the plan as necessary.

	In both cases, Workday performs a partial calculation for any plans that depend on the salary plan and adjusts the PCB.
When does Workday calculate MBT?	Workday runs the MBT calculation during these business processes, even when used as a step in another process: • *Propose Compensation Hire* • *Propose Compensation Offer/Employee Agreement* • *Propose Compensation Change* • *Request Compensation Change* • *Request Compensation Change for Leave of Absence* • *Initiate Compensation Review Process*
How does Workday calculate non-MBT compensation?	You update individual plans and Workday sums the change into the compensation basis. However, each update to individual plans may require managers to understand minute details and dependencies to determine compensation plan allocations.
What is a partial calculation and when is it used?	Workday performs partial calculations in cases where you update an individual compensation component during a business process such as *Change Job*. Workday then recalculates plans in the same sequence as a normal MBT calculation but begins at the step associated with the updated component, and skips previous steps. Example: The compensation administrator updates the salary plan amount assigned during a *Change Job* business process. With this change in salary plan, Workday performs a partial calculation beginning with the salary plan and continuing downward.
Can I use MBT if I must provide a guaranteed amount?	Yes. You can configure a calculation compensation basis and select Guaranteed Basis for the type. A guaranteed basis consists of plans, the sum of which is guaranteed for the worker. Workday can only decrease the guaranteed amount when the worker's PCB amount decreases. See: Create Calculation Compensation Basis on page 1136 and Manage by Basis Total - Advanced.
Does Workday persist updated compensation basis values when using MBT?	Yes. With MBT, Workday persists an assignment amount, currency, and frequency for every plan type for each assignment. A compensation event must take place to update the assigned amounts. For non-MBT compensation, Workday doesn't store plan assignment amounts for certain plan types at the assignment level. Workday recalculates these

	amounts dynamically each time they display, taking into account the current state of compensation data. Workday also calculates percent-based plans differently and this often results in very different assignment amounts compared to MBT.

If I use MBT, does it apply to all workers?	No. An MBT worker must:
	• Meet the conditions of the eligibility rule associated with the MBT compensation basis.
	• Be eligible a PCB compensation basis that has:
	  ◦ An associated eligibility rule the worker qualifies for.
	  ◦ The Manage Basis Total option selected.
	  ◦ Compensation included in the Functional Areas field.
	  ◦ The Use to View Compensation option selected.
	  ◦ The Ranking must be set to 1.

What are some best practices for implementing MBT?	Workday recommends that you follow these best practices when configuring a compensation basis with MBT: • Use the same frequency and currency for all pay components. Doing so ensures consistency when Workday recalculates individual pay assignments based on the PCB. • Add MBT to the name of any compensation basis you create with the Manage Basis Total option selected. Consider doing the same if you use eligibility rules specifically for MBT.

Related Information

Tasks

Steps: Manage Compensation Basis on page 1133

Create Configurable Compensation Basis on page 1134

Reference

Manage by Basis Total

Set Up Compensation Reviews

Setup Considerations: Compensation Reviews

You can use this topic to help make decisions when planning your configuration and use of compensation reviews. 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

Compensation reviews enable you to plan for and grant periodic:

- Merit increases to base pay, including promotions, allowances, and lump sum awards.
- Bonuses, including cash and deferred bonus in the form of stock.
- Stock grants as shares, options, or cash.

As part of your planning process, you can decide on compensation review milestones and set up grid configurations and named sets of initiation options.

Business Benefits

The compensation review process enables you to:

- Schedule important compensation milestones.
- Configure the organization type and roles with authority to create, edit, or review awards.
- Process staffing changes while compensation reviews are in progress.
- Manage budgets.
- Include merit, bonus, or stock plans.
- Select the organizations to include.
- Select the eligibility rules for target employee populations.
- Identify those responsible for planning, approving, and reviewing awards.

You can create a custom set of fields, or grid configurations, to guide managers during compensation reviews. You can set the fields to read-only, editable, or advanced (drill-down). You can reuse or update grid configurations in subsequent review cycles.

Use Cases

You can plan and schedule regular compensation reviews, including:

- Annual reviews that include merit, bonus, and stock awards.
- Semiannual or quarterly reviews that include bonus awards.
- Periodic reviews that include only stock awards and align with your fiscal cycle.

Questions to Consider

Questions	Considerations
Do you have employees in multiple countries or managers with direct reports in other countries?	As a best practice, consider selecting the Calculate Inverse Rate on the Maintain Currency Conversion Rates task for the selected rate type and affected currencies. If selected, Workday automatically calculates the inverse currency exchange rate between the source and target currencies. You can also select your own currency exchange rate.
Which goals factor into bonus awards?	To calculate bonuses, you can create compensation scorecards to capture company, division, or department goals and their attainment.

Questions	Considerations
Do you offer stock to your employees?	You can configure stock plans based on amount, percent, or units. You can also grant cash in the same manner as stock. You can use a third-party stock administration application to enable employees to manage their stock awards.
Do you move employees between organizations or create new organizations during compensation reviews?	You can use the Maintain Compensation Review Process Employee Participation report to add or remove employees to or from in-progress compensation review processes. You can also use the *Compensation Review Maintain Employee Participation* operation type on the Mass Operation Management task to remove or add back previously removed employees. The Compensation Review Update New Organization Data task runs automatically on a regular schedule to detect organizations that aren't currently in a compensation review process but have eligible employees resulting from: • The Maintain Compensation Review Process Employee Participation report. • The *Change Job* process. • The *Request Compensation Change* process. • The *Move Workers* process. • The *Change Organization Assignment* process. This task automatically adds new organizations provided they're both subordinate to the top level organization and existed before you initiated the process. Optionally, you can use this task to manually add newly detected organizations more quickly than the automatic process. See: Steps: Add or Remove Employees to or from Compensation Reviews on page 1208 As a best practice, Workday recommends that you create new organizations that you intend to add to a compensation review process before you initiate the process.
How do you manage staffing and compensation changes that occur while the compensation reviews are in-progress?	You can configure participation rule sets to manage individual compensation, grade, or job changes while the compensation review is in-progress. You can also: • Access the Create Compensation Review Options task. • Allow specific business processes to proceed with options for date ranges or eligibility rules.

Questions	Considerations
	If you don't configure participation rule sets, Workday blocks job or compensation changes for eligible employees. • After process initiation. • Before the latest effective date of any award in the compensation review event.
Do you need to allow some staffing or compensation changes while compensation reviews are in progress?	You can configure compensation review options that allow *Change Job* or *Request Compensation Change* events to proceed. You can: • Allow all events for the process to proceed for 1 or more date ranges. • Allow only events for the process to proceed for 1 or more eligibility rules and for 1 or more date ranges.
What fields do you want managers to view during compensation reviews?	You can configure compensation review grid configuration fields as read-only, editable, and advanced (drill-down) fields.
Is 1 compensation review grid adequate, or do you require more than 1, each targeted for a specific population?	You can set up grid configuration profiles, each targeted at users based on locale, organization, assigned roles, and other attributes. You can also set up a default grid configuration. See: Steps: Configure Compensation Review Grid Profiles on page 1172.
Do you use eligibility waiting periods?	You can configure eligibility waiting periods to determine whether employees are eligible for merit raises or bonuses.
Do you prorate merit or bonus target amounts?	You can base proration rules on base pay changes, time since hire, leaves of absence, and other criteria.
What period do you consider when prorating awards?	Workday uses the process period end date to determine: • Eligible employees based on their plan assignments. • The proration calculations and performance ratings used.
When do you want employees to find out their awards?	You can set an employee visibility date to hide awards until management communicates with employees outside of Workday.

Recommendations

Workday recommends that you create or retire organizations either before initiating a compensation review process or after the process completes.

If you use compensation matrices and include performance ratings, Workday recommends that you complete performance ratings before the process period end date of the compensation review.

Determine whether your event is large enough that you need to work with the Workday Production Readiness team.

See Workday Community: Production Readiness: Large Volume Events Best Practices. for guidelines about opening a Production Readiness case.

Requirements

No impacts.

Limitations

Workday doesn't support intersection security groups with exclusion criteria for compensation reviews.

Tenant Setup

You can configure these compensation review options on the Edit Tenant Setup - HCM task:

Option	Description
Disable Create New Compensation Review Statement functionality for Employee on View Compensation Review Statements	Prevents employees from creating their own compensation review statement.
Preferred Compensation Review Employee Awards Grid Limit	Workday limits to 500 the number of employees in the same organization hierarchy that a planner can view.

Security

These security domains in the Advanced Compensation functional area.

Domains	Considerations
Worker Data: Stock Grants	Required to configure stock pools or issue stock grants.
Worker Data: Propose Stock Award as Part of Compensation Review	Required to issue stock awards during compensation reviews. You can only configure roles on the same organization type as used in the *Complete Employee Awards* step.
Worker Data: Compensation Review Statements	Enables managers to print statements for their direct reports.
Self-Service: Compensation Review Statement	Enables employees to print their own statements.
Process: Compensation Management Events	Enables compensation administrators to initiate and finalize the process.
Process: Compensation Review Process Controls	Enables the Manager role to access and complete tasks.
Process: Compensation Review Process Participant	Enables support roles such as HR Partner and Compensation Partner to view and edit employee awards.
Process: Compensation Review Process Reviewer	Enables Reviewers (HR Partners and location or regional managers) to view or edit awards.

Domains	Considerations
Process: Compensation Review Rule Based Access	Enables you to configure rule-based security for compensation administrators and others with heightened security to control employee-as-self access.
View Compensation Review Pool Data	Enables you to hide compensation review pool and budget wheel graphics from target populations of compensation review users.

Business Processes

Before configuring the *Initiate Compensation Review Process* business process for all compensation reviews, consider which roles:

- Should have control over submitting employee awards. Examples: Merit Planner or Manager.
- To add to the *Complete Employee Awards* subprocess: Example: Compensation Administrator.

Reporting

Reports	Considerations
Compensation Review Process Search Employees (Default)	You can use this report to give participants access to the grid configuration within the Organization Summary.
Compensation Review Organization Search Report (Default)	You can use this report to give reviewers access to the grid configuration within the Organization Summary.
Compensation Review Process Status Report By Hierarchy	Administrators can use this report to access organizations in the process and review budgets, spend, and status.
Maintain Bonus Accrual Estimates	You can use this report to estimate bonus costs using the same initiation parameters as a periodic compensation review.

Integrations

Workday provides these public web services to support compensation reviews:

Web Service	Description
Get Compensation Matrices	Retrieves compensation review matrices. You can also use the *Put Compensation Matrices* web service.
Get Compensation Review Participation Rule Sets	Retrieves compensation review participation rule sets created on the Maintain Compensation Review Participation Rule Sets task. You can also use the *Put Compensation Review Participation Rule Sets*
Get Compensation Review Validation Rules	Provides validation rules created in Workday for compensation review processes.

Web Service	Description
Get Deferred Bonus Calculation	Displays deferred bonus calculations that you created on the Create Deferred Bonus Calculation task.
Get Eligibility Waiting Period	Provides eligibility waiting periods created on the Create Compensation Eligibility Rule task or the *Put Eligibility Waiting Period* web service.
Get Employee Awards	Provides employee awards for a specific employee by position or all employees in a supervisory organization.
Get Import Compensation Review Budget Pools	Imports into the compensation review budget pools for single or multiple organizations, by compensation review event and organization. You can include subordinate organizations by compensation plan type.
Import Compensation Review Budget Pools	Updates the budget pool, holdback, and reserve information for all supervisory organizations for a specified compensation review.
Import Eligible Earnings Override	Adds or updates eligible earnings override information for a given employee. Workday updates in-progress compensation reviews that: • Have participation rule sets. • Include bonus awards.
Import Employee Awards	Updates employee awards for specified employees, organization, and compensation review.
Put Compensation Matrices	Uploads compensation review matrices. You can also use the *Get Compensation Matrices* web service.
Put Compensation Review Participation Rule Sets	Uploads compensation review participation rule sets. You can also use the *Get Compensation Review Participation Rule Sets* web service.
Put Compensation Review Validation Rules	You can upload new or modified validation rules for compensation review processes into Workday.
Put Deferred Bonus Calculation	Add or change a deferred bonus calculation.
Put Eligibility Waiting Period	You can upload new or modified eligibility waiting periods.

Touchpoints and Connections

Compensation review events can touch many other areas in Workday, including the *Hire* and *Change Job* business processes, Workday Payroll, Workday Expenses, and Workday Talent.

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.

Related Information

Concepts

Concept: Coordination of Events During Compensation Reviews on page 1179

Concept: Best Practices for All Large-Scale Events

Tasks

dan1370796711847.dita

Steps: Prepare for Compensation Reviews on page 1154

Steps: Set Up the Compensation Review Business Process on page 1157

Reference

Reference: Compensation Review Participation Rule Set Options on page 1200

Reference: Event-Specific Best Practices

FAQ: Employee Visibility Date on page 1191

The Next Level: Annual Compensation Events

25R2 Release Note: Rule-Based Security Groups for Compensation Review

Examples

Example: Coordination of Organization Events in Compensation Reviews on page 1181

Example: Time-Based Proration for Merit and Bonus Awards on page 1184

Steps: Create a Compensation Matrix

Prerequisites

Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Context

You can configure a compensation matrix to help you determine merit increases, bonus targets, or stock grants for employees during a compensation review. You can build a classic compensation matrix with:

- Rating scales.
- Potential rating.
- Compa ratio.
- Retention ratings.
- Pay range segments.

You can also configure a total value compensation matrix based on a custom conditional calculation that incorporates skills from the job profile, performance, or other worker attributes.

Examples:

- Give high-performing employees paid within the lower quartile of their grade range a larger bonus or pay increase.
- Plan relative increases, bonus awards, or stock grants in order to reward performance, encourage retention, or equalize pay within a grade.

During compensation reviews, managers can see a suggested range that uses performance, talent, and market data to determine the award.

Steps

1. Access the Create Compensation Matrix task.

2. Select the type of compensation matrix:

Option	Description
Classic Compensation Matrix	Configure a matrix based on rating scales, potential rating, compa ratio, retention ratings, and so on.
Total Value Compensation Matrix	Configure the matrix with a custom calculation that evaluates worker attributes. Example: • Terry doesn't have a review rating and Workday can't calculate a performance factor using a classic compensation matrix. • By using a total value compensation matrix with a custom calculation, you can default a 2 percent factor for workers like Terry that don't have a review rating.

3. As you complete this task, consider:

Option	Description
Amount	An amount matrix is for amount-based stock, bonus, or merit plans and consists of an exact amount for the minimum and maximum bonus amount, and a default currency. The exact amount can be positive or negative and up to 2 decimal places. Example: • Terry has an amount-based stock plan with a 10,000 target. • Terry has a performance rating of 3-Meets Expectations. • The compensation matrix has a Minimum of 8000, a Maximum of 12500, and the default currency is USD. • The recommended stock grant for Terry ranges from 8,000 to 12,500 USD.
Percent	A percent matrix can be used for percent-based stock, bonus, or merit plans and consists of the exact percent for the minimum and maximum values. Example: • Casey has a base salary of 100,000. • Casey has a performance rating of 3-Meets Expectations. • The compensation matrix has a Minimum of 2% and a Maximum of 3%. • The recommended merit increase for Casey is 2-3% based on a percent-based matrix with Review Rating = 3, Minimum = 2%, and Maximum = 3%.
Weighted	A weighted matrix can be used for amount- or percent-based bonus or merit plans. It can also be used for an amount-, percent-, or unit-based stock plan. Use a weighted matrix if you want the minimum and maximum target ranges based on a factor used to derive the targets for a plan based on a percentage amount. Example: • Haley, has a percent bonus plan with a 6% target. • Haley has a base pay of 100,000 and receives a performance rating of 3-Meets Expectations.

Option	Description

	• The weighted matrix has a Minimum of 50% and a Maximum of 75%.
	• The recommended bonus range is:
	  • Minimum = 100,000 * 0.06 * 0.5 = 3,000.
	  • Maximum = 100,000 *0.06 * 0.75 = 4,500.

Use Above and Below Segments	Available if you selected Include Pay Range Segments. Adds rows for Below Segment 1 and Above Top Segment to the matrix. Enter the Number of Pay Range Segments.
Use Multiple Targets	Select this check box if you want the matrix to apply to specific employees that match 1 or more eligibility rules. Select 1 or more Eligibility Rules to identify the target population for the matrix.
Calculation	For a total value compensation matrix, select a custom calculation that determines a default factor. You can edit the calculation even when the compensation matrix is used in an in-progress event, provided the calculation produces a numeric value. See ../../../manage-workday/tenant-configuration/calculations/uso1574201918193.dita
Default Currency	Select a default currency. Select Apply Currency to apply your choice for Currency to all eligibility rules displayed in the Currency by Eligibility Rule list. Apply Currency displays for amount-based matrixes with Use Multiple Targets selected.
Currency by Eligibility Rule	(Optional) Select the currency for each eligibility rule.
Compensation Matrix	Enter the Minimum and Maximum values for each row of the matrix. Workday doesn't automatically enforce the minimum and maximum values you enter. To enforce the minimum and maximum, you must create custom validations. See Steps: Set Up Custom Validations.

You can also use the *Get Compensation Matrices* and *Put Compensation Matrices* web services.

4. (Optional) Access the Maintain Compa Ratio Range task.
   a) Enter the Segment Top to establish the maximum value for the compa ratio range.
   b) Create the compa ratio ranges you'll use for the compensation matrix.

      Examples: you can create rows for 25, 50, 75, 100 and 125 that results with ranges of:

      - Zero - 25% (zero - 25.000)
      - 25 - 50% (25.001 - 50.000)
      - 50 - 75% (50.001 - 75.000)
      - 75 - 100% (75.001 - 100.000)
      - 100 - 125% (100.001 - 125.000)
      - 125% and greater (125.001 +)

5. (Optional) Access the Edit Compensation Matrix Rules task.
    - Convert a single target matrix to a multitarget matrix and update the name.
    - Add or remove compensation eligibility rules for a multitarget matrix.

Result
You can now assign the compensation matrix to a merit, bonus, or stock plan.

When you process the plan, Workday uses the compensation matrix factors and associated plan targets to calculate the pool and provide managers with target ranges. You can also assign the matrix to a merit plan as reference only.

Related Information
Tasks
../manage-compensation-reviews/kur1380757488368.dita
Create Compensation Grades on page 989
Create Compensation Packages on page 1044
Create Grid Configurations for Compensation on page 1169
Reference
Reference: Compensation Step and Grade Progression Reports on page 1003
Total Value Compensation Matrix

Steps: Prepare for Compensation Reviews

Prerequisites

Set up merit, bonus, or stock plans.

Steps

1. Steps: Set Up the Compensation Review Business Process on page 1157.
2. Edit Domain Security Policies.

    To include stock in the process, grant access to these domains in the Advanced Compensation functional area:

    - *Worker Data: Propose Stock Award as Part of Compensation Review*.
    - *Worker Data: Stock Grants*.

    To print compensation review statements, configure these security domains in the Advanced Compensation functional area:

    - *Self-Service: Compensation Review Statements* domain, so employees can print their own statements.
    - *Worker Data: Compensation Review Statements* domain, so managers can print statements for their direct reports.
3. Enable domains (in the Advanced Compensation functional area) and assign roles:

Domain	Roles	Description
Process: Compensation Management Events	Compensation Administrator	Required to initiate and finalize a compensation review process.
Process: Compensation Review Rule Based Access	Compensation Administrator	Enables you to create rule-based security groups that determine access to employee level data in compensation reviews,

Domain	Roles	Description
		including whether they can modify awards or planning for themselves.
Process: Compensation Review Process Participant	Planners: • Manager • Primary compensation planner	Plan compensation for an organization and view or plan subordinate supervisory organizations. Requires Modify access to plan awards.
Process: Compensation Review Process Controls	Manager	Required for access to Complete on Behalf.
Process: Compensation Review Process Controls and *Process: Compensation Review Process Participant*	Support roles: • HR Partner • Compensation Partner	View and edit employee awards as a planner. Can have either View or Modify access.
Process: Compensation Review Process Reviewer	Reviewers: • HR Partners • Location partners • Location or regional managers	View or edit the awards of their assigned employees. Can have either View or Modify access. The Business Process step *Review Employee Awards* uses any role-based security groups with Modify access on this domain in its configuration selection list.

Compensation Administrator	

Compensation Administrator	

4. (Optional) ../../../manage-workday/tenant-configuration/tenant-setup/dan1370797339945.dita.

Option	Description
Disable Create New Compensation Review Statement functionality for Employee on View Compensation Review Statements	Prevents employees from creating their own compensation review statement.
Preferred Compensation Review Employee Awards Grid Limit	Workday limits the number of employees in the same organization hierarchy displayed to a planner. You can enter a limit up to 500 or leave blank to use the default of 100.

5. Create and assign compensation plans.

6. (Optional) Configure how Workday manages merit changes for an employee:

   - To determine individual targets for percent-based plans and enter award amounts for each assigned plan, use total base pay. For this option, you don't have to create a compensation basis; Workday provides it for you.
   - To determine individual target amounts for percent-based plans, use the Primary Compensation Basis (PCB). Enter a total amount for the award. Workday allocates that amount to the individual plans that make up the PCB.

   See Steps: Manage Compensation Basis on page 1133.
7. Access the Maintain Event Categories and Reasons task.

   Create event categories and reasons for giving each award.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
8. Access the Maintain Currency Rate Types task to create at least 1 rate type specifically for compensation review processes.
9. (Optional) Manage Compensation Review Participation Rule Sets on page 1166.

   Define rules that Workday uses to handle compensation-related events that occur during the compensation review process.
10. (Optional) Access the Maintain Bonus Accrual Estimates report.

    Use compensation review initiation criteria, including organizations, bonus plans, and date parameters to estimate bonus costs.

    a) Configure compensation review initiation options as you would for any periodic review with bonus awards.
    b) Select an action.

       You can calculate your estimate immediately or configure a run schedule. Workday then generates the bonus accrual report. You can also cancel (delete), edit, or review an estimate.
    c) Click an accrual report to view and download your estimated bonus costs.

    Security: *Process: Compensation Management Events* domain in the Advanced Compensation functional area.
11. (Optional) Steps: Create Custom Compensation Review Statements on page 1223.

    Create employee compensation review statements to meet reporting requirements.

    Workday recommends:

    - Use the Workday-delivered Compensation Review Employee Adjustment for Statements report data source.
    - If scheduling a PDF print run in advance, access the Release Compensation Review Statement task and schedule it for off hours. You can use custom layouts and manage when employees can view their compensation review statement.
12. Create Grid Configurations for Compensation on page 1169.

    Grid configurations can include read only, editable, or advanced fields for drilling down into details.
13. Steps: Configure Compensation Review Grid Profiles on page 1172

    Grid profiles enable you to use more than 1 grid configuration for each compensation review process.
14. (Optional) Create Stock Participation Rate Tables on page 1115.

    Applies only to compensation review processes that include stock awards.
15. (Optional) Access the Create Compensation Review Process Template task.

    Create templates to enable Workday to populate fields in compensation review processes. See Initiate Compensation Review Processes on page 1205 and Manage Compensation Review Pools on page 1213 Steps: Configure Compensation Review Grid Profiles on page 1172 for detailed field descriptions.

You can also manage compensation review templates using these web services:

- *Get Compensation Review Template*
- *Put Compensation Review Template*

Next Steps

Run these reports to review the date, time, responsible party, and notes for the last submitted change to awards:

- Compensation Review Merit Award Audit
- Compensation Review Talent Audit
- Compensation Review Bonus Payment Audit
- Compensation Review Stock Plan Award Audit

Related Information

Tasks

../manage-compensation-reviews/kur1380757488368.dita

Steps: Manage Compensation Review Statements on page 1225

Manage Funding for Bonuses on page 1219

Steps: Update Approved Stock Grants on page 1117

Reference

25R2 Release Note: Rule-Based Security Groups for Compensation Review

Steps: Set Up the Compensation Review Business Process

Prerequisites

Decide which roles, such as Planner or Manager, require control over submitting employee awards. Workday determines roles for the entire compensation review when you initiate the process and ignores any subsequent changes in role assignments.

Context

You can set up the *Initiate Compensation Review Process* business process for all award types, including bonus and stock awards, with or without merit awards.

You can set up an integration with a third-party stock administration application to manage vesting and other stock administration needs.

Note: Don't delete business process condition rules that you associate with either active or inactive compensation plans. Doing so might result in unexpected errors. You can't recover deleted condition rules.

Steps

1. Select Business Process > Edit Definition from the related actions menu of the *Initiate Compensation Review Process* business process.
2. As you complete this task, consider:

Option	Description
Complete Employee Awards	a. Add the Compensation Administrator role to oversee the compensation review process, monitor organization status, maintain pools, and review employee participation. b. Activate Pending Security Policy Changes.

Option	Description
	c. Select Configure Participation. Then select the Organization Type to Use and the Group (role), such as Manager or Planner. The organizations you configure on this step must also be configured on the Create Compensation Review Options task. Workday recommends not to configure a delay on the Shared Participation step in this business process. A delay may result in irreversible problems with My Task items, sending back, and so on.
Manage Impacted Employees	This must be the second step in the *Initiate Compensation Review Process*.
• *Configure Pool* • *Distribute Pool* • *Launch Employee Award*	These steps must remain in this order.
Manage Bonus Process Funding	(Optional) For compensation review processes with bonus awards. If included, make this the completion step.
Review Employee Awards	(Optional) This step must follow the *Complete Employee Awards* step. The organizations you configure on this step must also be configured on the Create Compensation Review Options task. You can grant role-based security groups outside of your specified organizational hierarchy access to approve awards using assignable roles for organizations on the *Process: Compensation Review Process Reviewer* domain.

Related Information
Tasks
Edit Business Processes
Create Custom Business Processes

Steps: Manage Custom Calculations for Compensation Reviews

Prerequisites

Security:

- *Set Up: Payroll (Calculations – Generic)* in the Core Payroll functional area.
- *Grid Management* domain in the System functional area.
- *Process: Compensation Management Events* domain in the Advanced Compensation functional area.

Context

You can use custom calculations to populate fields in compensation reviews.

During a compensation review, Workday uses the calculation table to populate fields on your grid.

Steps

1. Create 1 or more calculations in the *Compensation* category using tasks such as Create Arithmetic Calculation or Create Lookup Calculation.

   You'll use calculations created in the *Compensation* category when you build the calculation table.

   Note: Calculations can be very complex. Workday recommends that you engage Workday Professional Services or a Workday Consulting Partner to help you configure the calculations for Compensation.
2. Access the Maintain Compensation Review Calculation Lists task.

   Configure 1 or more calculation lists and up to 50 list values. When you configure a compensation review calculation table, you can select that list and associate it with calculations and grid configuration fields. You can modify list values while a compensation review is in progress.

   Example: Enter Performance Factor for the list name with values for: Top Performer, Meets Expectations, and Needs Improvement. When you configure the calculation table, you can select the Performance Factor list and associate a calculation to each value.

   Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.
3. Access the Create Compensation Review Calculation Table task.

   A calculation table creates an association between the values on a custom calculation list, calculations, and update fields on your grid configuration.

   a) Select Calculation Table Entries, including 1 or more rows, each with an Input list value from a calculation list, a Calculation, and an Update grid configuration field.

      During the compensation review,
   b) Select the Custom Calculation Lists tab for merit, promotion, bonus, or stock.
4. Create Grid Configurations for Compensation on page 1169.

   Add custom calculation fields into the Merit or Bonus section of your grid configuration. Example: Custom Calculation Merit Numeric or Custom Calculation Bonus Currency. As a best practice, Workday recommends that also you add the update fields you used to create your calculation table.

   If you use a custom calculation bonus list, add Custom Calculation Bonus List Value to the Bonus section as an editable field.
5. Create Compensation Review Options on page 1174

   Select your Compensation Review Calculation Table or create a calculation table without leaving the task.
6. Initiate Compensation Review Processes on page 1205

   Select:

   - The grid configuration with 1 or more custom calculation fields.
   - The set of compensation review options that includes your Compensation Review Calculation Table.

Result

During the compensation review, Workday:

- Displays your grid with the custom calculation and other fields you configured. You can any update fields that you configured as editable when you set up the grid configuration.
- Recalculates the value of any Update Field based on changes to fields that it depends on.

Example

1. Create a calculation in the *Compensation* category on the Create Arithmetic Calculation task.
2. Create the Performance Factor calculation list on the Maintain Compensation Review Calculation Lists task with values for: Top Performer, Meets Expectations, and Needs Improvement.

3. On the Create Compensation Review Calculation Table task, you select the Custom Calculation Lists tab and on the Custom Calculation Bonus List prompt, select the Performance Factor calculation list.
4. On the Calculation Table Entries tab, you select *Custom Calculation Bonus List Value* for the Input field, select a Calculation, and select *Bonus Factor %* for the Update field.
5. On the Create Grid Configuration task, add the Bonus Factor % as an editable field to the Bonus section.
6. During the compensation review, you select a value from the Custom Calculation Bonus List Value List and enter a Bonus Factor % for each employee.

Related Information

Concepts

Concept: EIB Spreadsheet Data Entry Guidelines

Concept: Payroll Calculations

Tasks

Create Calculations

Reference

Reference: Numeric Calculations

2022R2 What's New Post: Compensation Review Calculation Lists for Bonuses

Create Eligible Earnings Overrides for Bonus and Stock

Prerequisites

Security: *Worker Data: Compensation Management by Organization* domain in the Advanced Compensation functional area.

Context

You can configure the actual earnings amount for an eligible earnings override, the period associated with the eligible earnings, and the qualifying bonus or stock plans.

Example: Rhonda worked over 40 hours of overtime from November 1 through December 31. You create the eligible earnings override for Rhonda with the exact eligible earnings amount. Workday then uses your override amount as the eligible earnings when calculating the bonus or stock awards.

You can only use eligible earnings overrides in compensation review processes that include bonus or stock awards.

You can also use these web services to manage eligible earnings overrides:

- *Import Eligible Earnings Override*.
- *Get Eligible Earnings Override*.

Steps

1. Access the Create Eligible Earnings Override task.
2. Select the Employee.

   If the specified employee has multiple jobs or positions, you can also select the Position.
3. Select the Eligible Earnings Override Period (date range) for which the employee's earnings are eligible for bonus or stock.

   If the period you require doesn't exist, select Create Eligible Earnings Override Period to create it.
4. Select any combination of bonus and stock plans.
   Example: Select Apply to All Bonus Plans to have the compensation review process apply eligible earnings to all bonus plans assigned to the employee, including newly assigned plans. Then select

3 Stock Plans to restrict the application of eligible earnings for stock to only those 3 plans. The override now applies to all bonus plans and 3 specific stock plans assigned to the employee.

Selecting the Bonus Plans or Stock Plans option without selecting any specific plans is equivalent to selecting None of the Above.

If you assign new plans to the employee, consider accessing the Edit Eligible Earnings Override task to update your configuration.

5. Enter the exact amount of the employee's Eligible Earnings Override for the specified plans and period.

   Note: Workday doesn't calculate the eligible earnings override. Enter the exact value that you want Workday to use as the basis for calculating awards.
6. Select the Currency of the eligible earnings amount.

   Eligible earnings use the frequency associated with the plan.

Next Steps

Access these reports:

- Eligible Earnings Override.
- Employees without Eligible Earnings Override.
- View Eligible Earnings Override Period.

Related Information

Tasks

Manage Compensation Review Participation Rule Sets on page 1166

Create Eligibility Waiting Periods for Compensation Review Processes

Prerequisites

Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Context

Create or update a compensation eligibility waiting period on the Create Eligibility Waiting Period task, which determines whether employees are eligible for a raise or a bonus. You base the rule on a single value, such as a hire date. If you run the process before the waiting period expires, you can add employees in a waiting period an exception with a target of zero.

You can also use these web services:

- *Get Eligibility Waiting Period*
- *Put Eligibility Waiting Period*

Employees in the waiting period don't automatically receive an award when the waiting period is over. Run the process again after the waiting period ends to give awards to these employees.

Steps

1. Access the Create Eligibility Waiting Period task.
2. Enter the Number and select a Unit value for the rule logic.

   Example: To configure a 1 year waiting period, select *12* and *Months*.
3. Select a From Date from which Workday starts counting.

4. If you selected Date of Last Base Pay change, you can select Excluded Criteria to exclude events that Workday won't consider as an increase.

   You can select:

   - Any number of staffing events to exclude.
   - Event categories and reasons regardless of segment security configuration.

   You can define types of excluded criteria on the Maintain Event Categories and Reasons task.

Example

When configuring the plan, you can select the Include Active Employees in Waiting Period option. If selected, Workday includes employees assigned to the plan and in the waiting period, as of the Process Period End Date, in the compensation review. However, Workday includes these employees as exceptions with a target of zero. Consider:

- Eligibility waiting period: *3 Months from Hire Date*.
- Include Active Employees in Waiting Period: selected.
- Process Period End Date: December 31.
- Two employees have different hire dates, September 23 and October 6.

Hire Date	Eligible for award on December 31?
September 25	Yes, September 23 to December 31 is more than 3 months. The waiting period ended on December 23.
October 6	No, October 6 to December 31 is less than 3 months. This employee is included in the process as an exception with a target of zero.

Next Steps

Assign the waiting period to merit and bonus plans. You can assign the same waiting period to multiple plans.

Related Information
Tasks
Steps: Set Up Bonus Plans on page 1092
Steps: Set Up Merit Plans on page 1088

Create Time Proration Rules for Compensation Reviews

Prerequisites

Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Context

You can create proration rules to determine the portion of the merit or bonus target amount that employees receive in compensation review processes.

You can use proration rules on various criteria:

- Compensation basis. Example: base pay changes.
- Factors. Example: FTE or scorecard changes.
- Time. Example: time in plan or time since a specified date.

Workday processes proration rules associated with merit or bonus plans during the compensation review process period and evaluates anything not specifically prorated on the compensation snapshot date. Exclusion criteria ignore the event that meets the rule, except in cases where other rules must evaluate the event.

Steps

1. Access the Create Time Proration Rule task.
2. (Optional) Select a Leave of Absence Grace Period Table.

   You can use grace period tables only in compensation reviews.

   You can also access the Create Leave of Absence Grace Period Table task.

   Each grace period table must have:

   - Leave Type
   - 1 or more Location Hierarchies
   - Grace Period Days
3. Select the Proration Criteria you want to use to calculate the individual target amount and contribution to the award pool.

   To exclude certain types of events, select Excluded Criteria. You can define types of Excluded Criteria in the Maintain Event Categories and Reasons task.

   For rules that define the process period start date, Workday uses the most conservative criteria. Example: If you use both *Time Since Hire* and *Time Since Continuous Service Date* in the same rule, Workday uses the most recent criteria to set the process period start date.

   For bonus plans with the compensation basis with eligible earnings override:

   - Prorates time and target percentage-based proration rules.
   - Doesn't prorate base pay changes.

   FTE Changes in Period only applies to compensation plans that have Apply FTE% selected. Workday evaluates other plans as of the compensation snapshot date. Combining FTE Changes in Period with Base Pay Changes in Period results in the most accurate application of the basis in the proration segments.

Rule Category	Rule	Description
Compensation Basis	Base Pay Changes in Period	Creates a segment for each of these business processes when they create a basis change during the process period: • *Request Compensation Change* • *Propose Compensation Change* as part of *Change Job*. This determines the basis to use, unless specifically excluded in the Exclusion Criteria. A base pay change might be caused by a change to FTE regardless of the use of the FTE Changes in Period rule.
Factor Change	FTE Changes in Period	Creates a segment for each of these business processes that change the FTE% during the process period: • *Request Compensation Change* • *Propose Compensation Change* as part of *Change Job*. • *Edit Position*. For percent-based bonus plans, Workday applies the FTE% to the basis to determine the merit or bonus target. For amount-based bonus plans, Workday applies the FTE% to the target award amount the employee is eligible for.

Rule Category	Rule	Description
		Example: You configure an amount-based bonus plan with an FTE time proration rule. Ben has an FTE change during the process period of the compensation review. Workday calculates proration segments based on Ben's FTE changes.
Factor Change	Scorecard Profile Changes in Period	Creates a segment for each of these business processes, without exclusion, and evaluates the scorecard result as of the segment end dates: • *Change Job* • *Change Organization Assignment* • *Move Workers (by Organization)* • *Move Workers (Supervisory)* Workday might prorate these scorecards: • Compensation matrix modifier. • Performance factor scorecard. • Performance factor scorecard modifier. • Plan modifier scorecard.
Factor Change	Target Changes in Period	Creates a segment for each each of these business processes when they change the employee target during the process period: • *Request Compensation Change* • *Propose Compensation Change* as part of *Change Job*. Workday applies the target to each segment.
Time	Leave of Absence	Subtracts any leave of absence taken from the process pay period. If you selected a Leave of Absence Grace Period Table, Workday subtracts the grace period from the total number of days on leave.
Time	Time in Plan	Excludes any period when the employee wasn't in the plan.
Time	Time in Position	Uses the date the employee was assigned to their position as of the beginning of the process period.
Time	Time Since...	Sets the beginning of the process period to 1 of these dates: • *Company Service Date*. • *Continuous Service Date*. • *Hire*. • *last Base Pay change*. • *last Merit increase*.

Next Steps

Assign the time proration rule to merit or bonus plans. You can assign the same time proration rule to multiple plans.

Create Compensation Rounding Rules

Prerequisites

Security: *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Context

You can create rounding rules for compensation plans or a compensation basis.

You can add a rounding rule to salary plans, but only when you've selected the Apply FTE% option and the worker's FTE % isn't 100 percent. Using a rounding rule on salary plans eliminates any need to round salary plan values with an integration and maintains consistency between Compensation and Payroll. See: Steps: Set Up Salary Plans on page 1068.

You can apply a rounding rule to allowance plans, but only when you’ve selected a Percent Based Allowance Plan and a ceiling is not also configured on the plan. Using a rounding rule on allowance plans eliminates any need to round allowance plan values with an integration and maintains consistency between Compensation and Payroll. Workday uses the pay range frequency to calculate the rounded compensation amount in Workday and payroll calculations.

Workday rounds merit and bonus award amounts during compensation review processes according to the rounding rules on the plans, if configured. See: Steps: Set Up Merit Plans on page 1088, Steps: Set Up Bonus Plans on page 1092, FAQ: Rounding and Precision in Compensation Review Calculations on page 1197 .

For stock awards, Workday reads the amount- or percent-based stock plans, if configured with rounding rules, and displays the amount or percent, but doesn't determine the final number of stock units in whole numbers until the grant is updated with a strike price. See: Steps: Manage Stock Plans and Grants on page 1109.

You can, however, configure compensation calculation tables that round stock awards by number, percent, or amount to whole numbers of stock units. Example:

- Create a calculation in the *Compensation* category that rounds values.
- Select the *Custom Calculation Stock Numeric* field for the Input column.
- On your grid configuration, add *Custom Calculation Stock Numeric* as an editable field to the Stock section.
- Workday rounds the stock award values you enter during the compensation review.

See: Steps: Manage Custom Calculations for Compensation Reviews on page 1158.

For compensation bases managed by a compensation basis total, Workday applies the rounding rule to the assignment amounts for all future compensation transactions. Steps: Manage Compensation Basis on page 1133.

Steps

1. Access the Create Compensation Rounding Rule task.
2. Select the Rounding Option:

Option	Description
Round	Examples: • 1.4 rounds down to 1.0. • 1.5 rounds up to 2.0.
Round down	Examples: Both 1.4 and 1.7 round down to 1.0.
Round half down	Examples: • Both 1.4 and 1.5 round down to 1.0.

Option	Description
	• 1.6 rounds up to 2.0.
Round up	Examples: Both 1.4 and 1.7 round up to 2.0.

3. Select 1:

Option	Description
Round to Currency Precision	Use the standard decimal precision for the currency.
Round to Nearest	Enter the number to which the rule resolves. Examples: • With *Round* selected, entering 1 for Round to Nearest rounds 7.20 to 7 and 7.80 to 8. • With *Round* Up selected, entering 10 rounds 7 to 10 and 14 to 20. • With *Round down* selected, entering 10 rounds 7 to 0 (zero) and 14 to 10.

4. (Optional) Add 1 or more Compensation Rounding Rule Profiles.

   For each profile, select an eligibility rule.

   Example: Some of your overseas offices have regulatory requirements to round pay to whole numbers. Workday provides tools to help you become compliant. You can configure 1 profile for each country that requires rounding to whole numbers, and select an eligibility rule based on locale. Workday rounds pay to whole numbers for those employees in those locales. Workday uses the default rounding rule for those employees in other locales.

Result

The effect of different rounding methods associated with compensation plans can have a cumulative effect on merit or bonus pool totals. Pool totals might differ from the sum of award amounts due to rounding of the individual amounts or the use of different rounding methods.

Next Steps

Access the View Compensation Rounding Rule report and select the related action off a rule to see an example.

Related Information

Reference

FAQ: Rounding and Precision in Compensation Review Calculations on page 1197

Manage Compensation Review Participation Rule Sets

Prerequisites

Security *Set Up: Merit and Bonus* domain in the Advanced Compensation functional area.

Context

You can create participation rule sets that determine how Workday coordinates events that might conflict with each other. Potentially conflicting events include organization changes, terminations, eligible earnings overrides, and parallel events that occur during a compensation review and result from these business processes:

- *Change Job*.
- *Change Organization Assignments*.

- *Propose Compensation Change*.

  When configuring the parent process, *Propose Compensation Change* must either come before the completion step or be the completion step.
- *Move Workers*.
- *Request and Return from Leave of Absence*.
- *Request Compensation Change*.
- *Request Grade Change*.

You can also use these web services:

- *Get Compensation Review Participation Rule Sets*.
- *Put Compensation Review Participation Rule Sets*.

Steps

1. Access the Maintain Compensation Review Participation Rule Sets report.
2. (Optional) Select an action on any existing participation rule set.
3. Select Create Participation Rule Set.

   Select the type of rule set to create:

Option	Description
Organization Assignment	Organization assignments include those effective before the Organization Snapshot Date you configure when initiating the compensation review.
Compensation Parallel Event	Parallel events include those effective: • On or before the merit, bonus, or stock Compensation Snapshot Date. • Between the Compensation Snapshot Date and the Effective Date. • After the Effective Date. Configure each of these date range tabs: • On or Before Compensation Snapshot Date • Between Compensation Snapshot Date and Effective Date • After Effective Date
Termination	Terminations effective before the Effective Date.

4. As you configure a participation rule set, consider:

Option	Description
Employee Options	Select what Workday does with an employee and their compensation data: • Updates employee compensation basis, prorated targets, title, and other attributes. • Keeps the employee in the compensation review process. • Removes the employee from the compensation review process.
Pools Options	Select what Workday does with an employee's pool contribution:

Option	Description
	• Keeps the employee's pool contribution static or adjusts the organization pool. • Updates the pools with the recalculated plan, target, compensation basis, and proration data. • Removes the employee's pool contribution from the organization. Note: Workday stores pool contributions at the individual employee level and calculates pools once at process initiation to determine pools at the organization level.
Award Options	Select what Workday does with an employee's award: • Keeps it fixed but updates the compensation basis, target, title, and other attributes. • Sets award to zero. • Reverts the award to a previously entered amount or percent, or updates to a new target, spend, and pool.

5. (Optional) In the Rule Profiles section, create 1 or more rule set profiles that apply to specific populations of employees based on eligibility rules.

Result

You can select rule sets when configuring compensation review options. When managing impacted employees in a compensation review process, you can cancel conflicting events or notify the initiators of the source processes.

Next Steps

You can access the Create Compensation Review Options task and configure participation options.

Related Information

Tasks

Steps: Manage Multiple Events During Compensation Reviews on page 1210

Steps: Add or Remove Employees to or from Compensation Reviews on page 1208

Create Eligibility Rules for Compensation on page 986

Create Compensation Review Options on page 1174

Reference

Reference: Terminations During Compensation Review Processes on page 1203

../understand-compensation-reviews/qoq1520895776952.dita

The Next Level: Compensation Coordination of Events

Troubleshooting: Compensation Review Participation Rule Sets on page 1199

Examples

../understand-compensation-reviews/uuw1516733825351.dita

Steps: Manage Custom Modifiers for Compensation Reviews

Prerequisites

Security: *Worker Data: Compensation Management by Organization* domain in the Advanced Compensation functional area.

Context

You can configure custom modifiers to calculate bonus proration segments for specified employees. Examples:

- Set a proration segment to zero.
- Prorate a segment up to or greater than 100 percent.
- Prorate employee awards with multiple performance ratings.
- Prorate awards using more strategic modifiers that scorecards don't address.

Steps

1. Access the Maintain Compensation Review Custom Modifiers task.

   Enter 1 or more custom modifier names. Workday generates the Reference ID for use with the Enterprise Interface Builder on these web services:

   - *Get Employee Proration Segment Details*
   - *Import Employee Proration Segment Details*
2. Create Compensation Review Options on page 1174.

   In the Custom Modifier section on the Participation Rules tab, select what Workday does with the planned bonus award when a custom modifier is altered for an employee during the *Complete Employee Awards* or *Review Employee Awards* steps of a compensation review process:
3. Access the Maintain Compensation Review Custom Modifiers for Employee task.

   Apply custom modifiers to the employee's proration segments as determined by your selected compensation review process and bonus plans.

   For each Custom Modifier you configure for an employee's proration segment, enter a Custom Modifier Percent.

   Example: You apply 2 custom modifiers to Terry's second proration segment:

Option	Description
Company Adjustment	88
Position Performance Factor	110

   The Maintain Compensation Review Custom Modifiers for Employee task only works during these steps of an in-progress compensation review process:

   - *Configure Pools*
   - *Complete Employee Awards*
   - *Review Employee Awards*

Next Steps

Access the View Bonus Calculation report to display any custom modifiers used to calculate the bonus.

Related Information

Tasks

Steps: Create a Compensation Matrix on page 1151

Create Compensation Review Options on page 1174

Create Grid Configurations for Compensation

Prerequisites

Security: *Grid Management* domain in the System functional area.

Context

You can configure the grids and their editable, read-only, and advanced fields that display during compensation review processes. Each compensation review process can utilize 1 or more grid configuration. To use more than 1, however, you must:

- Set up grid configuration profiles. See:Steps: Configure Compensation Review Grid Profiles on page 1172.
- Set up 1 default response grid that encompass all award types in the compensation review process, If a manager or planner isn't eligible of any of your grid profiles, they'll see the default response grid.

You can optionally configure Data Entry Check Options (DEC) on the Edit Tenant Setup - HCM task. Workday delivers the feature on by default. However, you can click Select areas to switch on Data Entry Check and configure which compensation review fields to enable for DEC. Doing so enables Workday to validate the numeric data you enter for compensation reviews. If the numeric value you enter is outside historical amounts, Workday displays a validation message. Outliers are determined based on historical entries. See: ../../../manage-workday/tenant-configuration/tenant-setup/dan1370797339945.dita

A grid configuration consists of:

Grid Section	Description	Result in Completed Grid Configuration
Composite Column	Contains up to 4 business objects and related fields. Example: Employee name, titles, and photo.	Displays as the first column.
Individual Columns	Contains up to 4 fields for Compensation Review grids. Other grid types contain up to 2 fields.	Displays immediately to the right of the Composite Column.
Column Groups	Contains 1 or more fields. Examples: Merit, Promotion, Performance, Bonus, Stock.	Becomes a tab that, when opened, displays all of the fields configured for the Column Group.
Smart Panel / Summary View	(Optional) You can include fields selected as the Individual Column or as part of any Column Group in the Smart Panel and Summary View.	The Smart Panel displays at the end of each row. The Summary View becomes the first tab of the completed grid configuration.

When configuring a grid, you can select read only, editable, or advanced (drill-down) fields. You can then audit your grid to ensure that there are no missing fields based on the selected merit, bonus, or stock plans.

Steps

1. Access the Create Grid Configuration task.
2. Select:

Option	Description
Create Blank Configurable Grid	Select *Compensation Review Process* from What type of grid do you want to create?
Copy Details from Existing Configurable Grid	Select an existing grid of the type *Compensation Review Process*.

Option	Description
	Workday doesn't copy custom calculated fields. You must create them manually.

3. In the Composite Column section:

    - To define the column name in the completed grid configuration, enter a Label. Example: Employee Details.
    - Select a Business Object and a related Field for Title, First Subtitle, Second Subtitle, or Image.

    The Composite Column displays at the far left of the completed grid configuration.
4. Configure the Individual Columns and Grouped Columns sections. Consider:

Option	Description
Read Only	Displays a read-only business object and 1 of its related fields on the grid.
Editable	Not available for the Individual Columns.
Advanced	Displays a link that users can drill down on to view detailed data. For bonus awards, you can add an Advanced column type and select either the Actual Bonus Amount or Rounded Total Bonus Target Amount. On the completed grid configuration, you can drill down on these fields to reveal bonus calculation details.

    Example: Select Bonus for the Column Group and add Deferred Bonus Amount, Deferred Bonus Percent, or both as editable columns. You can also use these fields with the *Get Employee Awards* and *Import Employee Awards* web services.
5. (Optional) If you selected Read Only, enter a Label Override and, for numeric columns, a Format.
6. (Optional) Add 1 or more custom calculation fields. Example: Custom Calculation Merit Numeric, Custom Calculation Stock Numeric, or Custom Calculation Bonus Currency.

    Custom calculation fields work only with a calculation table. When you update a custom calculation field during a compensation review, Workday reads the calculation table and populates the values of its update fields. Workday recommends that you include all the update fields that make up your calculation table.
7. (Optional) If you selected Advanced, select the Errors field.

    This field is only available if you set up custom Critical or Warning validations using the Maintain Compensation Review Validations report. You set up compensation review validations the same way as other custom validations.

    During the compensation review process, managers must resolve critical exceptions before submitting their work. Example: You can set up a critical exception that prevents a manager from granting both merit and lump sum awards to the same employee.

    These fields are for use in Workday Financials and are incompatible with compensation reviews:

    - Critical Validation Exists
    - Validation Errors and Warnings
    - Warning Validation Exists
8. (Optional) Under Display Options, select 1 or more of the Valid Options to determine how data displays on the Smart Panel and the Summary View. The options available depend on the column type and field you've selected.

    Example: Selecting Show In Panel displays the field in the Smart Panel on the completed grid configuration. You can also add it to the Summary View.

9. (Optional) You can increase the limit on the Preferred Compensation Review Employee Awards Grid Limit on Edit Tenant Setup - HCM task from 500 to 2000.

   To increase the custom search report to 2000 lines, on the Advanced tab on the Copy Standard Report to Custom Report task, select the corresponding mass action:

   - Compensation Review Organization Summary Mass Action for Data Paging: to enable planners of the process to view more than 500 employees in the search report.
   - Compensation Review Process Search Employees Results Mass Action for Data Paging : to enable controllers and the Compensation Administrator to view more than 500 employees in the search report.

   Workday strongly recommends that you use these mass action operations only when the organizations and the compensation review process meet the criteria for infinite scrolling. Workday enables infinite scrolling on the compensation review grid when both:

   - From My Tasks, all employees in the organization are assigned no more than 1 plan of the same plan type.
   - From the Search Results, all employees in the process are assigned no more than 1 plan of the same plan type.
10. To verify that the grid includes fields that the merit, bonus, or stock plans indicate should display as read only or editable, run the Grid Configuration Audit report.
    a) Select a Grid Configuration.
    b) Select 1 or more merit, bonus, or stock plans for the process.

       The audit compares the grid to the selected plans:

       - Blocker: Identifies fields that you must add because they're editable on the plan.
       - Warning: Identifies fields the plan indicates should display as read only but are missing from the grid. Consider adding these fields.

Next Steps

Initiate a compensation review process.

Related Information

Concepts

Concept: Zero Increase Fields in Compensation Reviews on page 1181

Tasks

Initiate Compensation Review Processes on page 1205
Manage Awards for Compensation Reviews on page 1217
Manage Compensation Review Pools on page 1213
Configure Custom Validation Messages
Review Promotions in Compensation Reviews on page 1218
fcd1562624249943.dita
Create Compensation Review Options on page 1174

Steps: Configure Compensation Review Grid Profiles

Prerequisites

Context

You can create compensation review grid profiles that enable you to use multiple grid configurations for the same compensation review process. You can target each grid configuration for a specific audience, based on locale, organization, assigned roles, or other attributes. Compensation review participants see only a grid that makes sense for them, given their attributes.

To use multiple grid configurations for the same compensation review process, you must set up:

- More grid configurations, 1 for each target audience and 1 to use as a default.
- Grid profiles, which are conditional calculations that associate conditions with specific grid configurations.
- Select a grid profile on the compensation review template or when initiating a the compensation review process.

Grid profiles consist of 1 or more conditional calculations. Each conditional calculation specifies a target population, and must be associated with specific grid configuration. When you set up the compensation review, you select a grid profile configuration instead of a grid configuration to use multiple grids in the process.

Workday recommends as a best practice that you plan both your grid configurations and your grid profiles in advance of your compensation reviews:

- Plan a set of grid configurations and a matching set of conditional calculations, 1 for each target a population of your compensation review participants. When a participant enters the compensation review process, their attributes determine what grid configuration displays. Each grid configurations must match at least 1 of the conditional calculations you use for your grid profiles.
- Plan 1 default response grid configuration that encompass all award types present in the compensation review process. Workday displays the default response grid for participants not eligible for any of grid profiles.

Steps

1. Create your profile and default response grid profile configurations.

   See Create Grid Configurations for Compensation on page 1169.
2. Access the Create Conditional Calculation task.

   As you complete this task, consider:

Option	Description
Condition	Select from the Compensation category. Each must correspond to a target population of compensation review participants.
Result	Select a grid configuration to associate with each Condition. You can use the same grid configuration for multiple conditions.
Default Response	Select your default response grid configuration to display in case a participant doesn't meet any of the grid profile conditions.

   Security: *Set Up: Payroll (Calculations – Generic)* in the Core Payroll functional area.
3. (Optional) Access the Create Compensation Review Template task.

   Select a Grid Profile Configuration.
4. Initiate Compensation Review Processes on page 1205.

   Select either a:

   - Compensation Review Process Template that already has a grid profile configuration.
   - Grid Profile Configuration directly.

Result

Your compensation review displays different grid configurations for different populations of participants. Any participants not eligible for a grid profile see the default response grid.

Related Information
Reference
Grid Configuration Profiles for Compensation Review

Create Compensation Review Options

Prerequisites

- Configure rule sets on the Maintain Compensation Review Participation Rule Sets report.
- Security in the Advanced Compensation functional area:
  - *Process: Compensation Management Events* domain.
  - *Process: Compensation Review Process Reviewer* domain.

Context

You can create sets of parameters for options used when initiating compensation review processes.

Steps

1. Access the Create Compensation Review Options task.
2. As you complete the Process Options tab, consider:

Option	Description
Organization Details	Configure the organizations you include on the *Complete Employee Awards* and *Review Employee Awards* steps of the business process. Select an active Top Level Organization that doesn't have any superior organizations. When you select a top level organization, Workday includes employees assigned to plans targeted for the process and all those in the selected organization and its child organizations. (Optional) Select 1 or more Process Top Level Organization from the active child organizations within the structure of the Top Level Organization. Doing so restricts the employees and participants in the process to the subordinates under these organizations.
Approvals and Visibility	When you select: • *Entire Hierarchy*: The top-level planner/participant must approve all organizations. • *Next Participant Only*: Workday limits the approval to 1 planning level above and limits the planner's ability to edit to 1 level below.
Compounding Options	When you select Additional Adjustment and Promotion Awards as Percent of Current Compensation Basis, Workday adds awards to the current compensation basis instead of compounding the award. Example: Brendt's current compensation basis is 100,000. He receives a 10% merit increase, a 2% additional adjustment, and another 2% for his promotion. Workday sums all of Brendt's awards (0.10 + 0.02 + 0.02 = 0.14) and calculates his new current compensation basis: 100,000 + (100,000 x 0.14) = 114,000.
Autofill / Pre-Fill Value	When you select 1 of these options for Merit Awards and Bonus Awards: • *Compensation Matrix*: Workday populates awards to the midpoint of the matrix. • *Target*: Workday populates awards with the funded, prorated target associated with the plans.

Option	Description
	This applies if you: • Set up the merit or bonus plans to use a compensation matrix. • Selected to autofill or prefill values for the award type when you initiated the process.
Compensation Review Calculation	You can select an existing compensation review calculation table or create one here.

3. As you complete the Planning Preferences tab, consider:

Option	Description
Planner / Reviewer Preferences	Configure defaults for: • Edit in Currency: Display either the pay range or reference currency in editable currency amount fields. This setting has no effect on read only, advanced, or calculated fields. Regardless of setting, Workday pays awards in the employee's pay range currency. Workday pays stock plans configured with Use Target Currency for Grant selected in the target currency. • Organization Budgets: Display either all or your current organizations budget graphics during the process. • Exposure to Planners/Reviewers: When you select this check box, planners and reviewers can override the default from their My Tasks items and throughout the compensation review.
Search Reports	Workday enables access to the grid from these reports: • Compensation Review Process Search Employees (Default): Enables access to the grid configuration for security groups on the *Process: Compensation Review Process Reviewer* domain. • Compensation Review Organization Search Report (Default): Enables participants to search employees at the organizational hierarchy level from the My Tasks item. You can also access the compensation review grid from custom reports.
Pool and Spend	When you hide any award type, Workday allows pool overages and enables read-only access for all award types when you configure pools.

4. As you complete the Participation Rules tab, consider:

Option	Description
Date Range	Select 1 or more date ranges for the process, if applicable. Workday: • Allows events to proceed for the date ranges you select. • Blocks events for date ranges you don't select. Workday doesn't apply date ranges to Move Workers or Change Organization Assignments.

Option	Description
	Workday always enables all date ranges for Request and Return from Leave of Absence by default.
Allow All	Select to allow all events to proceed for the selected business process. Workday always enables this option for Request and Return from Leave of Absence by default.
Allow Only	Select 1 or more eligibility rules where you want Workday to allow parallel events to proceed. Workday uses the employee's compensation data as of the compensation snapshot date to determine eligibility.
• Organization Assignments and Reorganizations • Compensation Parallel Events • Terminations	Select a participation rule set for each award type. Rule sets include employee, pool, and award options that control how Workday manages conflicting transactions.
Leave of Absence	Each award type that you select remains on hold during the compensation review process until you release the leave of absence event on the Manage Compensation Review On Hold Events task. When you release, the effective date configured on the award type determines when awards take effect.
Eligible Earnings Overrides	Select what Workday does with the planned bonus awards when you make changes to the eligible earnings override during a compensation review process: • *Previously Entered Percent*: Workday updates the award to the previous percent. • *Update Pool Contributions*: Workday updates the employee contribution to the pool with the Eligible Earnings Override compensation basis.
Custom Modifier	Select what Workday does with the planned bonus awards when you make changes to the custom modifier during a compensation review process: • *Clear Award*: Workday sets proposals or awards to zero, overriding any prior proposals or awards. • *Keep Award Fixed*: Workday keeps the award fixed. • *Update Award to Previously Entered Percent*: Workday updates the award to the previous percent. • *Update Award to Previously Entered Factor*: Workday updates the award to the previous factor for bonus plans with an individual performance factor. • *Update Award to New Employee Target*: Workday updates the employee target, the spend, and the pool.

Result

Workday doesn't block parallel events already in progress before you initiate the compensation review process. Workday uses your configured participation rule sets to manage employee, pool, and award options. If you don't allow parallel events to proceed, Workday notifies and prevents the initiator of the business process from completing the parallel event.

Related Information

Tasks

Steps: Manage Custom Calculations for Compensation Reviews on page 1158
Steps: Prepare for Compensation Reviews on page 1154
Manage Compensation Review Participation Rule Sets on page 1166
Steps: Manage Custom Modifiers for Compensation Reviews on page 1168

Access Compensation Review Grids from Custom Reports

Prerequisites

Create compensation review option sets.

Context

You can create custom reports from which planners and reviewers can access the compensation review grid.

Steps

Access the Create Custom Report task.

As you complete this task, consider:

Option	Description
Data Source	Select *Compensation Review Process Employee Adjustments - Indexed*.
Data Source Filter	If you select Securing Filter for Participant, Workday uses the report parameters for search criteria when: • The number of employees exceeds the Preferred Compensation Review Employee Awards Grid Limit configured on the Edit Tenant Setup - HCM task. • When you select Search Employees from the Organization Summary. If you select Securing Filter for Reviewer, use the Hide Workday Delivered Report task to hide the Compensation Review Search Employees (Default) report. Note: When you hide standard reports, Workday doesn't display them in searches. You can also use the Hide Workday Delivered Report task to find hidden reports.
Report Definition > Sharing Options	Select Share with all authorized users.
Action > View Options	Select Exclude Execution Link from Search for any reports using the Securing Filter for Participant option to prevent running these reports outside the context of the Organization Summary.
Action > Advanced	Select Compensation Review Organization Summary Mass Action to populate the report from the Organization Summary for participants. Select Compensation Review Process Search Employees Results Mass Action for reviewers.

Related Information

Concepts

Concept: Custom Reports

Tasks

Create Custom Reports

Understand Compensation Reviews

Concept: Compensation Reviews

Compensation reviews configured with approval limited to the entire hierarchy are a collaboration between process participants. Planners can complete the process for a subordinate organization on behalf of its participant. Planners can also send the process back for correction.

The Compensation Administrator or HR Partner can also review organizations and awards as a planner. The My Tasks notification completes only after all organizations submit up to the Compensation Planner level and the Planner submits.

You can configure compensation reviews to use cost centers, custom organizations, location hierarchies, and supervisory organizations.

Note: Cost centers aren't hierarchical organizations except when grouped as a cost center hierarchy. When configuring the participation on the business process, there's 1 role that is the participant for both the organization and the organization hierarchy. The same role must exist on both organization and organization hierarchy.

Workday stores pool contributions at the individual employee level and calculates pools once at process initiation to determine pools at the organization level. Workday stores remainder amounts or adjustments at the organization level. Example: An organization has a 10,000 pool divided among 3 employees with each receiving 3,333.33. Workday stores the remaining 0.01 at the organization level.

Workday then updates values if employee contributions change due to parallel events. The employee-level contribution isn't reportable for employees removed from the process.

When you distribute or maintain pools, you can change pool amounts and apply holdbacks at any organization level.

If the grid configuration has editable targets, you can create budget pools that:

- Deduct the spend from the merit pool.
- Configure a separate pool based on the merit target of each employee or any configured amount.

Workday records changes to employee targets as overrides on the latest of these effective dates:

- Merit
- Additional adjustment
- Promotion

As you manage impacted employees, you can:

- Apply the original contribution.
- Apply the new contribution.
- Replace the original contribution for the employees that you've manually removed from the process.

Logan accesses the Create Compensation Review Options task and:

- Configures the Autofill / Pre-Fill Value section. Both Merit Awards and Bonus Awards use the compensation matrix to populate awards to the midpoint of the matching compensation matrix row.
- Leaves the Approval Limited To prompt set to *Entire Hierarchy*.

Naomi manages 15 people directly and reports to Drake, who manages 2 managers and 1 direct report. Drake reports to Don, the Vice President of Manufacturing. Don has 4 subordinates.

Logan is the Compensation Administrator and HR Partner. Logan also has the Controller role with the ability to finalize the process and remove planning from the initial participants.

After Logan initiates the compensation review process, Naomi sees a notification to complete the process. She accesses the process and sees the direct reports listed in the grid configuration selected for the process. After reviewing the plans, she decides to click Autofill, enabling Workday to populate the award amounts. She reviews the amounts for each of her reports and submits.

Concurrently, Drake opens his notification, which displays his 2 organizations and direct report. Drake reviews the plan and spend for his entire organizational hierarchy, looking into Naomi's and Julie's organizations. He remembers that Julie is traveling, so he clicks Complete on Behalf and clicks Autofill to populate the awards for her people. While reviewing Naomi's group, he decides it needs work and clicks Send Back for Naomi to reconsider.

Finally, Don reviews the entire process and makes a few adjustments. He reviews the bonus award for some of Naomi's employees, and drills into how Workday calculated the bonus. He clicks Jeremy's rounded bonus target to display the bonus plan modifier and rounding rule applied. Drilling down further, Don sees the discretionary targets, performance factor, and applicable scorecards. Drilling down again, Don sees that Jeremy's prorated numbers because he went from full-time to half-time over the past year. Workday displays the sum of the 2 proration segments, including the eligible earnings, and the target amount. After his subordinates have submitted and Don has corrected some awards, Don's satisfied that everything is in order and submits.

With all subordinate organizations reporting into Don have now submitted, Logan finalizes the process. Workday removes the notification for any outstanding planners who haven't submitted. After the business process completion step, Logan ensures that Workday created all of the compensation worker events accordingly.

Related Information

Tasks

Manage Compensation Review Participation Rule Sets on page 1166

Steps: Add or Remove Employees to or from Compensation Reviews on page 1208

Steps: Prepare for Compensation Reviews on page 1154

Reference

FAQ: Employee Visibility Date on page 1191

The Next Level: Compensation Review Overview

Concept: Coordination of Events During Compensation Reviews

If you initiate compensation or staffing events while a compensation review process is in-progress, any changes you make to compensation attributes might conflict. Because such changes to compensation might affect target or pool calculations, you must configure how Workday manages these conflicts.

If the compensation review is in progress, Workday prevents the initiator of the business process from completing the parallel event. However, Workday allows business process events to proceed if they're in progress before you initiate the compensation review.

For those parallel events in progress before the compensation review, Workday uses participation rule sets to manage conflicting events. You create participation rule sets on the Maintain Compensation Review Participation Rule Sets report. Each participation rule set:

- Applies to a process type: organization assignments, parallel events, or terminations.
- Consists of options that determine what Workday does with employees, their pool contributions, and their awards.
- Can include profiles, each associated with eligibility rules.

When you configure the compensation review process, you can assign participation rule sets to determine how Workday will reconcile the conflicting transactions. Workday displays employees with competing events on the *Manage Impacted Employees* step of the process. These events occur after the Compensation Snapshot Date and before the Effective Date.

Examples:

- If a reorganization occurs during the process, configure a participation rule set that moves the employee awards to the new organization if it's in the process.
- If there's a compensation change outside of the compensation review process, you can remove the employee merit award and their contribution from the merit pool.

There's a way to allow certain business process events to proceed even if initiated while a compensation review is already in progress. You can use the Create Compensation Review Options task to allow business process events to proceed while a compensation review is in progress: You can:

- Allow all events for the process to proceed for 1 or more date ranges.
- Allow only events for the process to proceed for 1 or more eligibility rules and for 1 or more date ranges.

For employees placed on hold, you can access the Manage Compensation Review On Hold Events task. You can release on-hold leave of absence events, cancel on-hold awards, or cancel events. When you release a leave of absence (LOA) event, the effective date configured for the award type determines when awards take effect. Workday doesn't release awards automatically when the employee returns from leave. You can only release on hold events if the employee doesn't have any other in-progress parallel events.

Compensation reviews can only process certain reorganization actions before the organization snapshot date, provided you configure participation rule sets.

Organization Changes	Description
Assign superior organization.	The superior organization must be in the compensation review before the organization snapshot date.
• Create subordinate organization. • Divide organization. • Activate organization.	When employees in a compensation review move to the new organization, either manually or by participation rule sets, the new organization displays in the hierarchy or My Tasks item.
Inactivate organization.	Compensation reviews can't act on inactivated organizations. Reactivate the organization.

Related Information
Tasks
Manage Compensation Review Participation Rule Sets on page 1166

Steps: Add or Remove Employees to or from Compensation Reviews on page 1208

Steps: Manage Multiple Events During Compensation Reviews on page 1210
Reference
Reference: Compensation Review Participation Rule Set Options on page 1200

The Next Level: Compensation Coordination of Events

Troubleshooting: Compensation Review Participation Rule Sets on page 1199

Concept: Zero Increase Fields in Compensation Reviews

If an employee is eligible for an award, but receives no recommendation (zero), Workday cancels the event by default. Workday only displays the event to users with security access to see cancelled events and doesn't include cancelled events on the Compensation Review Statement.

To override the default behavior, add 1 or more of these fields, set to Editable, to your grid configuration:

- Merit Zero Increase
- Bonus Zero Increase
- Stock Zero Increase

The planner can then select Yes for these fields during the compensation review. The default is No. When a worker is eligible for an award but receives a zero recommendation, selecting Yes for these fields results in:

- A successfully completed event displaying an award amount of 0 (zero).
- A Compensation Review Statement displaying an award amount of 0 (zero).

Workday recommends using these validations if you use 1 or more of the zero increase fields on your grid configuration:

- If the recommendation is 0 and the zero increase field is No, ask the planner to either enter a recommendation or change the zero increase field to Yes.
- If the recommendation isn't 0 and the zero increase field is Yes, ask the planner to either enter a recommendation of 0 or change the zero increase field to No.

Related Information
Tasks
Create Grid Configurations for Compensation on page 1169

Example: Coordination of Organization Events in Compensation Reviews

Organization events that occur while a compensation review is in progress can have an effect on how Workday calculates awards.

Context

Global Modern Services is preparing their 2014 performance period, using this schedule:

01/01/2013 to 12/31/2013	12/31/2013	01/05/2014	02/05/2014	02/10/2014	02/17/2014	03/01/2014
Eligibility Period (Process Period)	• Process Period End Date • Bonus Compensation Snapshot Date • Stock Compensation Snapshot Date	• Process Launched • Organization Snapshot Date	Process Complete	Effective Date of Stock	Effective Date of Bonus	• Merit Compensation Snapshot Date • Effective Date of Merit

The compensation review process involves these compensation plans and organizations:

- Merit Plans A and B
- Bonus Plans D and E
- Stock Plan F
- Organizations X and Y

Betty Liu, Jared Ellis, and Leslie Silko are eligible for merit, bonus, and stock awards in 2014. Parallel compensation or staffing events at the initiation of the process don't affect them.

Result
Betty Liu

Betty Liu has these compensation plans:

- Merit Plan A from 01/01/2013 to 12/31/2013.
- Merit Plan B from 01/01/2014 to 12/31/2014.
- Bonus Plan D from 01/01/2013 to 01/10/2014.
- Bonus Plan E from 01/11/2013 onward.
- Stock Plan F from 01/01/2013 onward.

Betty was a member of Organization X from 01/01/2013 to 01/03/2014. She was a member of Organization Y from 01/04/2014 onward.

Eligibility Period (Process Period)	01/01/2013 to 12/31/2013	Betty is eligible for the process and the merit, bonus, and stock awards because of her plan assignments during the eligibility period.
• Process Period End Date • Bonus Compensation Snapshot Date • Stock Compensation Snapshot Date	12/31/2013	Workday determines Betty's compensation for bonus and stock on this date. Workday calculates the pools as part of Organization Y. Bonus target for Bonus Plan D = 10% * 100% of year. Stock target for Stock Plan F = 2%.
Organization Snapshot Date	01/05/2014	Betty is considered part of Organization Y for the process.
Effective Date of Stock	02/10/2014	
Effective Date of Bonus	02/17/2014	
• Effective Date of Merit • Merit Compensation Snapshot Date	03/01/2014	Merit target for Merit Plan B = 6%.

Jared Ellis

Jared Ellis has these compensation plans:

- Merit Plan A from 01/01/2013 to 12/31/2013.
- Merit Plan B from 01/01/2014 to 12/31/2014.
- Bonus Plan D from 01/01/2013 to 12/10/2013.
- Bonus Plan E from 12/11/2013 onward.
- Stock Plan F from 01/01/2013 onward.

Jared was a member of Organization X from 01/01/2013 to 02/14/2014. He was a member of Organization Y from 02/15/2014 onward.

Eligibility Period (Process Period)	01/01/2013 to 12/31/2013	Jared is eligible for the process and the merit, bonus, and stock awards because he has the eligible plans during the eligibility period.
• Process Period End Date • Bonus Compensation Snapshot Date • Stock Compensation Snapshot Date	12/31/2013	Workday determines Jared's compensation for Bonus and Stock on this date for the process. Bonus target for Bonus Plan D = 10% * 96.98% of year. Bonus Plan E = 15% * 3.02% for the remainder of the year. Bonus total = 10.151%. Stock target for Stock Plan F = 2%.
Effective Date of Bonus	12/31/2013	
Effective Date of Stock	12/31/2013	
Organization Snapshot Date	01/05/2014	Jared is considered part of Organization X for the process. Workday calculates all pools as part of Organization X.
• Effective Date of Merit • Merit Compensation Snapshot Date	03/01/2014	Merit target for Merit Plan B = 6%.

Leslie Silko

Leslie Silko has these compensation plans:

- Merit Plan Q from 02/15/2014 to 12/31/2014.
- Merit Plan A after 03/04/2014, after Effective Date of Merit.
- Bonus Plan D from 01/01/2013 to 01/10/2014.
- Bonus Plan E from 01/11/2014 onward.
- Stock Plan F.

Leslie was a member of Organization X from 01/01/2013 onward.

Process Period (Performance Period)	01/01/2013 to 12/31/2013	Leslie is eligible for the process but only for the bonus, and stock awards because she has the eligible plans during the eligibility period. However, she doesn't have a merit plan assigned at the launch of the process because Merit Plan A's assignment occurred only after process launch.
• Process Period End Date • Bonus Compensation Snapshot Date • Stock Compensation Snapshot Date	12/31/2013	Workday determines Leslie's compensation for Bonus and Stock on this date. Bonus target for Bonus Plan D = 10% * 100% of year. Stock target for Stock Plan F = 2%.
Effective Date of Bonus	12/31/2013	
Effective Date of Stock	12/31/2013	

Organization Snapshot Date	01/05/2014	Leslie is considered part of Organization X for the process. Workday calculates all pools as part of Organization X.
• Effective Date of Merit • Merit Compensation Snapshot Date	03/01/2014	Leslie had Merit Plan Q before the Merit Compensation Snapshot Date, but her change to Merit Plan A only happened after the completion of the process. She won't receive a merit award during this process. Leslie remains eligible for the Bonus and Stock Awards because there were no changes to those plans.

Example: Time-Based Proration for Merit and Bonus Awards

Context

A time proration rule includes *Time since Hire*, *Time since last Merit increase*, and *Leave of Absence* proration criteria:

- You hire Elena on January 1 at 90,000 USD annual.
- You give her a pay increase of 10,000 USD annual on February 1 resulting in 100,000 USD annual.
- She takes 1 month of personal leave in March.
- The focal merit review begins on April 1.
- Her nonprorated target merit increase is 5% annual.

Result

Workday takes the most recent proration criteria, which is the compensation increase. The resulting eligible merit increase period is February 1 to April 1, or 2 months out of 12. The next proration criteria is the personal leave, which subtracts a month from the eligible period. Elena is eligible for 1 month of the merit increase (1/12) of the 100% merit increase target of 5,000 USD. Her target merit increase is 42% or 416.67 USD = the original merit increase target of 5% (or 5000) divided by 12.

The logic is slightly different if the leave of absence occurs before the compensation increase. If Elena:

- Took her leave in February.
- Received a pay increase that took effect on March 1.

Workday takes the most recent proration criteria, which is the compensation increase. The resulting eligible merit increase period is March 1 to April 1, or 1 month out of 12. The next proration criteria is the personal leave. However, because the leave occurred before the compensation increase, Elena still has 1 eligible month. She's eligible for 1/12 of the 100% merit increase target of 5,000 USD. Her target merit increase equals the original merit increase target of 5% (or 5,000 USD) divided by 12. The result is 0.42% (rounded) so her target merit increase for this period is 416.67 USD. The resulting increase is exactly the same but the logic is necessarily different.

Related Information
Tasks
Create Time Proration Rules for Compensation Reviews on page 1162

Example: Include Active Employees Assigned Plan During Process Period

Context

Workday can use only 1 merit plan for each employee to calculate their merit award during a compensation review. Workday uses the most recently assigned plan, depending on plan configuration. If Include Active Employees Assigned Plan During Process Period is selected on the plan, employees assigned to the plan on the Process Period End Date (PPED) remain eligible for an award even if they're no longer assigned to the plan on the Compensation Snapshot Date (CSD).

Note: Workday can't determine a merit award based on a plan unless the plan is included in the process.

Example:

- Terry is assigned to merit plan A on the PPED.
- The Annual compensation review process includes merit plans A and B.
- Merit plan A has Include Active Employees Assigned Plan During Process Period selected. Merit plan B doesn't.
- You reassign Terry to merit plan B after the PPED and before the CSD.
- Workday determines Terry's merit award using merit plan B. Because merit plan A has Include Active Employees Assigned Plan During Process Period selected, Terry is still eligible to receive an award during the Annual compensation review, provided merit plan A is in the review process.

More examples:

Include Active Employees Assigned Plan During Process Period	Plans included in Process	Merit Plan in Effect as of PPED	Merit Plan in Effect as of MCSD	Workday Determines Award Based on Merit Plan...
Selected on Merit Plan A	A	A	B	A, because the option is selected and plan B isn't included in the process.
Not Selected on Merit Plan A	A, B	A	B	B. The option isn't selected on plan A and plan B is the most recently assigned plan.
Selected on Merit Plan A	B	B	A	B. Even though the option is selected on plan A, it's not included in the process.
Not Selected on Merit Plan A	A, B	B	A	A. The option isn't selected for plan A, but it's the most recently assigned plan.

Related Information

Reference

Reference: Terminations During Compensation Review Processes on page 1203

FAQ: Merit, Bonus, and Stock Pool Calculations on page 1192

FAQ: Compensation Reviews

How is an employee included in a compensation review process?

What target takes precedence when an employee matches multiple targets?

How do I keep my budget in sync with the compensation matrix?

How does Workday include performance reviews in compensation review processes?

How do I change a completed and funded compensation review process?

Can I set up compensation review processes on organization types other than supervisory?

How do I deal with different pay periods?

Can I use process setup parameters on a recurring basis?

Can I select not to compound additional adjustment and promotion awards?

Is proration calculated to the month or to the day?

How is an employee included in a compensation review process?	When initiating a compensation review process, you configure: • A Process Period End Date. • A merit, bonus, or stock Compensation Snapshot Date. • An Organization Snapshot Date. Workday uses eligibility rules in effect as of the Process Period End Date to: • Determine which employees to include in the process. • Ensures that valid compensation data exists as of the applicable Compensation Snapshot Date. • Processes the Organization Snapshot Date to determine included organizations. You can include terminated employees in a compensation review process that includes bonus awards. Select the Include Employees Terminated During Process Period check box when initiating the process. Workday includes terminated employees subject to rules configured on the bonus plan and on the Maintain Compensation Review Participation Rule Sets report. You can also select Include Active Employees in Waiting Period on the merit or bonus plan. When employees are assigned both the plan and in the waiting period on the Process Period End Date, Workday includes them with a target of zero.
What target takes precedence when an employee matches multiple targets?	Workday uses this order of precedence to derive merit and bonus targets for each employee: 1. Guaranteed minimum target (for individual employee). 2. Employee individual target. 3. Compensation matrix target. 4. Plan profile target. 5. Plan default.

How do I keep my budget in sync with the compensation matrix?	The merit pool displays the increase amount, based on the compensation matrix. If you know what your budget is, you can adjust the merit pool to match it.
How does Workday include performance reviews in compensation review processes?	Workday uses the most recently entered performance rating, either from an in-progress or a completed performance review, when: • A compensation matrix is associated with the merit plan and isn't for reference only. • The performance review template has a period end date relative to the frequency of the plan before the Process Period End Date. For merit, this is 1 calendar year before the Process Period End Date, regardless of the Process Period Start Date. • The performance review rating is either complete or was entered after you initiated the compensation review and before the Process Period End Date. If Workday can't find a performance review rating, it reads the default target on the plan. Workday doesn't retroactively revise the award if the performance review is updated after the Process Period End Date. Workday calculates the overall rating for the specified review templates. Workday then matches this result to the performance level on the compensation matrix to determine the recommended merit increase. If the matrix definition includes pay range segments, Workday determines which segment the employee's salary falls into, based on assigned grade.
How do I change a completed and funded compensation review process?	If you've already distributed the merit pool to organizations, you can select Business Process > Cancel as a related action off the event. Alternatively, you could ask all the managers to award more or less than their designated pool amount. If incorrect pool amounts are likely to be an issue, add a step to the business process to review the merit pool before sending it to the managers. For a completed process, select Business Process > Rescind as a related action off the event. If incorrect employee changes are possible, consider adding a step at the organization or location hierarchy level before completion.
Can I set up compensation review processes on organization types other than supervisory?	Yes. You can select these organization types from the Configure Participation button on the *Initiate Compensation Review Process* business process: • Cost Center • Custom Organization

	• Location Hierarchy • Supervisory Workday displays the organization types you select when you initiate the process.
How do I deal with different pay periods?	Workday considers different pay periods during calculations, and converts all salaries into the reference frequency specified during the compensation review process.
Can I use process setup parameters on a recurring basis?	Yes. Configure named sets of process options on the Create Compensation Review Options and Create Compensation Review Process Template tasks.
Can I select not to compound additional adjustment and promotion awards?	Yes. Select the Additional Adjustment and Promotion Awards as Percent of Current Primary Compensation Basis check box when you initiate the process. If selected, Workday adds awards to the Primary Compensation Basis (PCB) instead of compounding the award. Example: Brendt's PCB is 100,000. He receives a 10% merit increase, a 2% additional adjustment, and another 2% for his promotion. With the check box selected, Workday: • Sums all of Brendt's awards: (0.10 + 0.02 + 0.02 = 0.14). • Calculates his new PCB: 100,000 + (100,000 * 0.14) = 114,000. If left blank, Workday calculates Brendt's new salary in these cumulative steps: • 100,000 + (100,000 * 0.10) = 110,000. • 110,000 + (110,000 * 0.02) = 112,200. • 112,200 + (112,200 * 0.02) = 114,444.
Is proration calculated to the month or to the day?	To the day. Workday calculates employee days as: `proration rule / days in the review period.`
What date does Workday use as the merit year in order to calculate proration?	To calculate the proration, Workday uses Process Period End Date specified when you initiate the process and goes back exactly 1 year.
Can I set the proration period dates?	Yes. You can select the Process Period Start Date for each merit or bonus plan on the Initiate Compensation Review Process task. Workday displays the Days in Period for reference. The default is the difference between the Process Period End Date and the plan frequency. You can select a date up to 15 months before the Process Period End Date.

	The process period start and end dates determine how Workday divides proration segments and employee eligibility. Setting a Process Period Start Date also affects merit and bonus plan eligibility for plans with either of these options enabled: • Include Employees Terminated During Process Period • Include Active Employees Assigned Plan During Process Period
Can I change an employee's compensation plan target during a compensation review?	Yes, by including 1 of these editable fields on the grid configuration: • Allowance Target Amount - Proposed. • Allowance Target Percent - Proposed. • Bonus Target Amount - Proposed. • Bonus Target Percent - Proposed. • Commission Draw Amount - Proposed. • Commission Target Amount - Proposed. • Stock Target Amount - Proposed. • Stock Target Percent - Proposed. Workday determines plan eligibility and the value of the default target as of the merit effective date. Planners can edit the future target if: • The plan allows individual overrides. • The employee is in the process with a related merit plan not managed by basis total. • The employee is still eligible for the plan as of the merit effective date. • The employee isn't being promoted into a position that removes the related plan, such as from Bonus Plan A to Bonus Plan B, or the PCB. Planned targets for promoted employees don't transfer to the *Change Job* process from the Review Promotions in Merit task.
When does a salary increase take effect after the compensation review process?	Workday uses the Effective Date specified when you initiate the compensation review process as the date the new salary takes effect. Example: The Compensation Administrator initiates the compensation review process on February 15 and specifies April 1 as the Effective Date. The process completes on March 10. The employee salaries in Workday reflect the change on April 1.
What happens if there's a compensation change to an employee's salary after the process finishes but before the Effective Date of the salary change?	On the Effective Date, Workday replaces the old salary with the new salary from the merit increase. Example: The Compensation Administrator initiates the compensation review process on February 15 and specifies April 1 as the Effective Date. An employee has a salary of 50,000, and the manager

	approves a 10% raise to 55,000 as part of this process. The process is complete on March 10, and the salary remains 50,000, awaiting the April 1 effective date for the raise to take effect. On March 15, the HR Partner requests an immediate base salary change for the employee, from 50,000 to 60,000, effective March 15. Workday warns that this increase will be superseded. On April 1, the employee's merit increase replaces her current salary. Her merit increase was 55,000. On April 1, her salary is set at 55,000, instead of the previous 60,000 paid between March 15 and March 31. Note: Use the Out of Order Compensation Changes report to verify employees with a compensation change effective earlier than the existing compensation change. You can give an employee a raise that an earlier compensation change with a later effective date voids.
What date does Workday use to determine the current salary amount to use as the basis for the merit percent calculation?	Workday determines what the employee's salary will be on the applicable Compensation Snapshot Date and uses that salary throughout the process. Workday doesn't recalculate the result of the percentage increase on the date the salary change takes effect. The formula for determining the new salary is: `old salary + (old salary * merit increase %) = new salary`. Example: The Compensation Administrator initiates the compensation review process on February 15 and specifies April 1 as the Effective Date and March 31 as the Merit Compensation Snapshot Date. On February 15, Workday determines the employee's salary will be 50,000 on March 31. When the manager gets the compensation review event for the employee, she sees a salary of 50,000 and gives a 10% increase. The new salary is 55,000. The increase is approved, the process completes March 10, and the salary remains 50,000. On April 1, the employee's merit increase replaces her current salary. Since her merit increase was 5,000 (`10% * 50,000`), her salary starting on April 1 is 55,000.
Do changes to a compensation basis update plans other than salary and hourly?	If the merit plan has the Manage Basis Total option selected, yes. If not, changes to the compensation basis during a compensation review update only salary and hourly plans. Example: An employee is assigned: • Merit plan A. Manage Basis Total isn't selected. • Allowance plan B. The PCB is Total Base Pay. • A base pay plan that is a salary plan.

	Workday applies the merit increase percent only to the salary plan, increasing it by the percentage specified. To ensure that updates to a compensation basis affect plans other than salary or hourly, configure Manage Basis Total on both: • The merit plan. • A custom compensation basis that includes both the base pay plan and any other plans you want to include in the calculation.
How do I pay a referral bonus?	A referral bonus is a one-time payment rather than part of a bonus plan. To pay a referral bonus: 1. Establish a one-time payment plan for the referral bonus. 2. Use the Request One-Time Payment task. Note: If the pay group detail is locked, then the referral payment may be delayed until the next payroll cycle.

Related Information

Reference

Troubleshooting: Compensation Review Participation Rule Sets on page 1199

FAQ: Employee Visibility Date

What is the Employee Visibility Date?	The Employee Visibility Date gives compensation administrators the option to select a future date. After that date, employees signed in as Employee as Self can view their updated pay-related compensation data. Managers can then inform their workers of pay changes outside of Workday before the visibility date. Note: Selecting an Employee Visibility Date hides only updated *pay-related* changes, not staffing changes such as transfers, promotions, or changes to benefits. If you don't include the *Propose Compensation Change* step on the *Change Job* or *Edit Position* business processes, Workday doesn't apply the Employee Visibility Date. See: Steps: Propose Compensation for Employees or Positions on page 1032
How do I enable the option to set an Employee Visibility Date?	• Select the Enable Employee Visibility Date check box in the Compensation section on the Edit Tenant Setup - HCM task. • Add the *Employee As Self* security group to the View Completed Only As of Date on the business process security policy for the

	Compensation Change for Compensation Plan Event. To ensure workers can't see updated compensation data before the visibility date, don't include them in the *Employee as Self* security group on the: • *Propose Compensation* step of business processes. • *Propose Compensation Change* business process. • Staffing and Job profile groups from the worker profile. • View All or View Completed Only sections of the *Request Compensation Change* and *Request One-Time Payment* processes.
Does enabling the Employee Visibility Date on the tenant hide any data?	No. Selecting the Enable Employee Visibility Date option on the tenant makes the Employee Visibility Date visible on compensation change and compensation review processes. The compensation administrator must still select a visibility date when initiating the process, which only then hides pay-related data. If the visibility date isn't selected (left blank), pay-related data becomes visible after the Effective Date of the process.
If selected, how does the Employee Visibility Date differ from the Effective Date?	Example: The compensation administrator initiates a compensation review process with an effective date of August 31: <table><tr><td>If the Employee Visibility Date is...</td><td>Updated pay-related data becomes visible...</td></tr><tr><td>September 5</td><td>After the Employee Visibility Date, September 5.</td></tr><tr><td>Left blank</td><td>After the Effective Date, August 31.</td></tr></table>
What about the effective dates for additional awards in compensation reviews?	If the effective date for merit differs from the effective dates of any additional awards, workers can't see the award details until after both: • The Employee Visibility Date of the process. • The respective effective date of the individual awards.

Related Information

Reference

FAQ: Compensation Defaulting on page 1039

FAQ: Merit, Bonus, and Stock Pool Calculations

How is a merit pool calculated?

How is a bonus pool calculated?

How does a bonus pool calculation differ from a merit pool calculation?

Can I see the detailed bonus calculation?

How does a change in FTE % affect the bonus calculation?

What causes a bonus scorecard profile change and what is the effect?

How does individual or company performance affect an employee's bonus target?

How is a stock pool calculated?

Does plan type affect how Workday calculates pool and spend for target change?

How does Workday handle remainder amounts?

Note: These calculations don't take proration or rounding into consideration.

How is a merit pool calculated?

Workday calculates a merit pool using the compensation basis and merit targets of employees in the same organization and merit plan:

```
Compensation Basis of Employees in
Org. & Plan * Merit Plan Targets of
Employees in Plan = Merit Pool
```

For employees managed by a compensation basis total, the compensation basis is the Primary Compensation Basis. Otherwise, the compensation basis is the total base pay, excluding amount-based compensation plans.

If there's a weighted compensation matrix on the merit plan, the merit pool calculation is:

```
Compensation Basis of Employees in
Org. & Plan * Merit Plan Targets
of Employees in Plan * Weighted
Compensation Matrix = Merit Pool
```

Workday evaluates these factors in order when calculating merit targets:

1. Individual target override: You can configure the merit plan with an option to allow individual target overrides. You can then edit merit plan assignments and override merit targets during a compensation or staffing transaction.

   The individual target, if configured, overrides factors 2, 3, and 4 in the merit pool and the employee target calculations.
2. Nonweighted compensation matrix: Usually includes performance or potential rating, compa-ratio, retention rating, pay range segments, or eligibility rules.

   If the employee meets criteria specified in the compensation matrix, Workday doesn't consider factors 3 and 4.

3. Merit plan profile targets: You can configure the merit plan with profile targets based on eligibility rules, such as country or location. During processing, Workday uses eligibility rules to determine the target award for an employee and to calculate the merit pool.

   If the employee meets criteria specified in a merit plan profile target, Workday doesn't consider factor 4.
4. Default plan target. You can configure merit plans with a default target. Workday uses the default target to calculate the merit pool and award when it can't find an individual target override, compensation matrix, or merit plan profile.

   If Workday can't calculate the merit pool and employee target from evaluating factors 1 through 3, it uses the default plan target.

How is a bonus pool calculated?

If the bonus plan doesn't have a weighted compensation matrix or modifier scorecards, and isn't associated with an eligible earnings override, the bonus pool calculation is:

```
Employee Eligible Earnings Amount /
Period Specified by Plan Frequency *
Employee Bonus Target = Bonus Pool &
Employee Bonus Target
```

If the bonus plan doesn't have modifier scorecards and isn't associated with an eligible earnings override, but does have a weighted compensation matrix, the bonus pool calculation is:

```
Employee Eligible Earnings Amount /
Period Specified by Plan Frequency
* Employee Bonus Target * Weighted
Compensation Matrix = Bonus Pool &
Employee Bonus Target
```

If there are company or modifier scorecards on the bonus plan, the employee bonus target and bonus pool calculations are:

```
Employee Eligible Earnings Amount /
Plan Frequency * Employee Bonus Target
* Scorecard or Modifier = Bonus Pool &
Employee Bonus Target
```

With a weighted compensation matrix, company or modifier scorecards, the bonus pool calculation is:

```
Employee Eligible Earnings Amount /
Plan Frequency * Employee Bonus Target
* Weighted Compensation Matrix *
Scorecard or Modifier = Bonus Pool &
Employee Bonus Target
```


How does a bonus pool calculation differ from a merit pool calculation?	Like the merit target, the bonus target results from individual target overrides, compensation matrix, bonus plan profile targets, or the bonus plan default target. However, the bonus target uses eligible earnings during the period specified by the plan frequency. It can also include company or modifier scorecards that reflect corporate or division performance.
Can I see the detailed bonus calculation?	Yes, provided the process uses a grid configuration that includes the Rounded Total Target Amount and Actual Bonus Amount advanced fields. You can drill down on these fields to reveal exactly how Workday calculated the bonus. You can also run the View Bonus Calculation report to display how Workday calculated: • Total Bonus Target Amount • Bonus Actual Amount • Discretionary Target Amount • Nondiscretionary Target Amount • Sum of Proration Segments You can provide unconstrained or role-based access to the View Bonus Calculation task through the *Process: Compensation Review Bonus Details* domain.
How does a change in FTE % affect the bonus calculation?	If you create a proration rule based on *FTE Changes in Period* and add it to a bonus plan, Workday evaluates FTE % changes between the Process Period Start Date and the Process Period End Date. If the FTE % changes during the process period, Workday divides the process period into proration segments when calculating bonuses. Example: For the 2015 bonus period, Terry's FTE % changed from 100% to 50%. Workday created 2 proration segments at 100% and 50%, respectively. Workday then calculates each proration segment separately: `FTE % * Proration % * Target %` Workday then sums all proration segments before calculating eligible earnings. If you enable Paid FTE in the Staffing section on the Maintain Localization Settings task, Workday uses the paid FTE override in the calculations for these compensation review targets: • Allowance • Bonus • Merit • Stock

	When you drill down on a bonus target during a compensation review, Workday displays the calculation, including the FTE % and Proration %.
What causes a change to the bonus scorecard profile and what is the effect?	These business processes can cause a change to the bonus scorecard profile: • *Change Job* • *Change Organization Assignment* • *Move Workers (by Organization)* • *Move Workers (Supervisory)* Workday prorates on custom organizations for organization changes that occur outside of a compensation review process. However, compensation review coordination of events only processes organization changes for organizations included in the compensation review process. If the *Scorecard Profile Changes in Period* proration rule is associated with the worker's bonus plan: • Workday evaluates the bonus scorecard changes between the initiation of the bonus period and the Process Period End Date. • Creates proration segments when calculating bonuses.
How does individual or company performance affect an employee's bonus target?	A performance rating (part of a compensation matrix) or a compensation scorecard can both be factored into the bonus target calculation: `Employee Bonus Target * Individual or Corporate Performance = Employee Bonus Target`

How is a stock pool calculated?	Stock pool calculations derive primarily from the compensation matrix and stock target (shares, amount, or percent). Percent-based stock plans must reference a compensation basis. Example:
	`Target * Total Base Pay * Weighted Compensation Matrix = Stock Pool`
	You can configure the stock plan to split the stock award into different types of grants. Example: 50% stock options and 50% Restricted Stock Units.
	If you apply the stock participation rate when you initiate the compensation review process, then:
	`Target * Total Base Pay * Weighted Compensation Matrix * Stock Participation Rate = Stock Pool`
	The stock participation rate doesn't affect employee stock targets. However, you can change stock targets using calculated fields.

Does plan type affect how Workday calculates pool and spend for target changes?	Yes. Workday calculates pool and spend differently for amount-based and percent-based plans. For amount-based plans:
	`New Plan Target Amount - Old Plan Target Amount`
	For percent-based plans:
	`New Target % * New Basis or Salary - Old Target % * Old Basis or Salary`
	A percent-based plan might result in spend for target pools even if the target is unchanged. Example: A 10% allowance plan for an employee whose salary changes from 100,000 USD to 200,000 USD results in a spend of 10,000 USD.

How does Workday handle remainder amounts?	Workday stores pool contributions at the individual employee level and calculates pools once at process initiation to determine pools at the organization level. Workday stores remainder amounts at the organization level. Example: An organization has a 10,000 USD pool divided among 3 employees with each receiving 3,333.33 USD. Workday stores the remaining 0.01 USD at the organization level.

Related Information

Reference

The Next Level: Compensation Plans and Pools

FAQ: Rounding and Precision in Compensation Review Calculations

How does Workday round bonus amounts?	Workday: 1. Calculates and stores all amounts with precision up to 12 decimal places. 2. Applies the rounding rule, if configured on the bonus plan, to both the total bonus and the nondiscretionary targets and amounts. 3. Applies currency precision rounding up to 6 decimal places. Workday doesn't update amounts due to changes in scorecard results or compensation plans while the compensation review is in progress, except: • When you run the Recalculate Pool and Awards task. • During processing of participation rule sets that use the Update Employee to Latest Data option. • During the *Manage Bonus Funding* step of the *Initiate Compensation Review Process*, Workday updates amounts based on the company funding scorecard.

- When you access the Compensation Review Recalculate Bonus Targets task. Workday updates nondiscretionary award amounts, but not discretionary amounts.
- When you remove and add back employees using the Maintain Compensation Review Process Employee Participation report.

To display how Workday calculated a bonus, access the View Bonus Calculation report.

Why don't amounts displayed in Workday match calculations made outside of Workday?

Workday calculates and stores numbers internally at a precision of up to 12 decimal places. Spreadsheet applications limit the number of decimal places in a single cell.

Workday displays values in the user interface and on reports at a lower precision, usually 4 or 2 decimal places. Doing so saves space and improves performance. When displaying values in the user interface and on reports, Workday truncates the decimal values without changing the persisted amount and doesn't perform rounding. Example: Workday stores 92.123498765432 but displays 92.1234 without changing the stored value.

When creating pools for compensation reviews, Workday uses individual employee targets if configured, or calculates an individual percentage share of the total pool at a precision up to 6 decimal places. Workday then stores each employee's pool contribution at a precision of up to 12 decimal places.

Example:

- An employee has a current base pay of 29,237.90.
- You enter a merit amount increase of 1,023.40 (2 decimal places).
- Workday calculates the percentage increase and stores the value at a precision up to 12 decimal places: (1,023.40 / 29,237.90) * 100 = 3.500251386043.
- Workday truncates the value to 4 decimal places for display on the user interface and on reports to 3.5002.

Verifying the calculation with less precision results in a difference of 0.02 (rounded to currency precision):

- Using value displayed: (3.5002 / 100) * 29,237.90 = 1,023.38.
- Using value persisted: (3.500251386043 / 100) * 29,237.90 = 1,023.40.

Related Information

Tasks

Create Compensation Rounding Rules on page 1165

FAQ: How is Total Eligible Earnings calculated?

To determine the Total Eligible Earnings when you configure pools for a compensation review process, Workday:

1. Identifies the plans selected when you initiated the process.
2. Identifies which compensation basis to use to calculate the target award amount: the Primary Compensation Basis (PCB) or *Total Base Pay*. Workday determines:

    a. If the merit plans that have the Manage by Basis check box selected.
    b. The rankings of each compensation basis as configured on the Maintain Compensation Basis task.
    c. The highest ranking PCB for an employee, based on the eligibility rules associated with the compensation basis.

       Example: Brian qualifies for both CompBasis2 and CompBasis3 based on the associated eligibility rules. Because CompBasis2 is ranked higher than CompBasis3 on the Maintain Compensation Basis task, the primary compensation basis for Brian is CompBasis2.
    d. If the compensation package for the employee includes the PCB.

    If Workday can't determine a PCB for the employee, it uses *Total Base Pay*.
3. Calculates the individual target award amounts that contribute to Total Eligible Earnings.

    For percent-based plans, these factors can affect the calculation:

Plan	Apply FTE	Matrix	Proration	Scorecard
Salary	Yes	No	No	No
Hourly	No	No	No	No
Allowance	Yes	No	No	No
Merit	No	Yes	Yes	No
Bonus	No	Yes	Yes	Yes
One-Time Payment	No	No	No	No
Commission	No	No	No	No
Stock	No	Yes	No	No

4. Adds the individual target award amounts to define the total compensation for the compensation review process.

Troubleshooting: Compensation Review Participation Rule Sets

Parallel Events Blocked During a Compensation Review

You've set up participation rule sets and compensation review options, but Workday still blocks parallel events you expected to proceed.

Cause	Solution
There are multiple award types in the process with varying compensation snapshot and effective dates. During compensation reviews, Workday blocks	Use the same snapshot and effective dates for all award types, if possible. Alternatively, reduce

Cause	Solution
parallel events that occur after the earliest snapshot date and before the latest effective date. The more time between these dates, the more likely that Workday blocks an event.	the time between the earliest snapshot and the latest effective date.
There are 1 or more employees that don't meet the conditions of the eligibility rules on the participation rule set.	Make sure the eligibility rules used for participation rule sets apply to the targeted employees. Update the participation rule sets, or if necessary, modify or add the eligibility rules.
You don't have participation rule sets configured on the Create Compensation Review Options task.	Select applicable participation rule sets in the Participation Rules section.
Your configuration on the Create Compensation Review Options task doesn't include the specific date range for the effective date of the event.	Select 1 or more date ranges in the Participation Rules section. Workday allows events to proceed for the date ranges you select and blocks those you don't.
There's a promotion associated with the merit award. While you can promote an employee as part of a compensation review, Workday blocks parallel events for that employee.	Complete parallel processes for the employee before initiating the compensation review process. Alternatively, don't associate promotions with merit.

Related Information

Concepts

Concept: Coordination of Events During Compensation Reviews on page 1179

Setup Considerations: Compensation Eligibility Rules on page 982

Tasks

Manage Compensation Review Participation Rule Sets on page 1166

Create Compensation Review Options on page 1174

Create Eligibility Rules for Compensation on page 986

Review Promotions in Compensation Reviews on page 1218

Examples

Example: Coordination of Organization Events in Compensation Reviews on page 1181

Reference: Compensation Review Participation Rule Set Options

Workday provides these participation options on the Maintain Compensation Review Participation Rule Sets report.

This topic uses these acronyms for date parameters configured on the *Initiate Compensation Review Process* task:

- CSD: Compensation Snapshot Date.
- ED: Effective Date.
- OSD: Organization Snapshot Date.

Employee Options

Employee Option	Valid Process Types & Date Ranges	Description
Remove Employee from... • Merit • Bonus • Stock	Parallel Process: • On or Before CSD. • Between CSD and ED. Termination: Before ED of award type.	Upon completion of the parallel event, Workday removes these employee awards from the compensation review process.
Update Employee to Latest Data	Parallel Process: On or Before CSD.	Upon completion of the parallel event, Workday updates the employee data, such as prorated targets, as of the CSD.
Keep Employee Data Fixed	Parallel Process: On or Before CSD.	Workday doesn't change employee award data, including compensation basis, targets, title, or other attributes. However, you can clear the Remove Pool Contributions check box under Pools Options.
Keep Employee in... • Merit • Bonus • Stock	Parallel Process: • Between CSD and ED. • After ED. Termination: Before ED of award type.	Workday keeps employees in the compensation review process. You can select 1 of these merit award options for parallel processes. However, you can't select bonus or stock award options for parallel processes or terminations. • *Apply Merit Increase Percent*: Workday applies the percentage that you enter to the current base pay of the parallel event. • *Apply Merit Increase Amount*: Workday applies the amount that you enter to the current base pay of the parallel event. • *Keep New Pay Amount Fixed*: Workday applies the new pay amount that you enter to the parallel event. Note: Workday applies the *Apply Merit Increase Percent* and *Apply Merit Increase Amount* options to compensation events effective between the CSD and ED, regardless of when the events successfully complete. However, Workday doesn't display base pay changes while the compensation review is in progress. Workday applies these changes only after process completion. Example: Sidney has a 100,000 USD compensation basis as of the CSD and you enter 10% in the compensation review grid. Sidney gets a pay increase to 200,000 in a parallel event after the CSD and before the ED. Sydney’s proposed base pay differs based on the option that you select:

Employee Option	Valid Process Types & Date Ranges	Description
		• *Apply Merit Increase Percent*: Proposed base pay is 220,000 USD. • *Apply Merit Increase Amount*: Proposed base pay is 210,000 USD. • *Keep New Pay Amount Fixed*: Proposed base pay is 110,000 USD.
Move Employee to New Organization	Organization Assignment: Before OSD.	Moves the employee to their new organization.
Keep Employee in Current Organization	Organization Assignment: Before OSD.	Keeps the employee in the old organization for purposes of the compensation review.

Pools Options

Merit pools include additional adjustment, promotion, lump sum, and any associated plan target pools. Workday stores pool contributions at the individual employee level and calculates pools once at process initiation to determine pools at the organization level.

Pools Option	Valid Process Types	Description
Remove Pool Contributions	Parallel Process, Termination.	Upon completion of the parallel event, Workday removes employee pool contributions from their organizations.
Keep Pool Fixed	Parallel Process, Termination.	Upon completion of the parallel event, Workday keeps employee pool contributions static or adjusts the organization pool.
Update Pool Contributions	Parallel Process.	Applicable only to bonus awards with eligible earnings override. Upon completion of the parallel event, Workday updates the employee contribution to the pool with the eligible earnings override basis. You can select this option on the Create Compensation Review Options task.
Update Pool per Latest Data	Parallel Process, Termination.	Upon completion of the parallel event, Workday updates the pool with the new target.
Merit, Bonus, or Stock	Organization Assignment	For the award type selected, Workday moves the employee's contribution from the old organization pool to the new organization pool. If not selected, Workday keeps the pool in the old organization during the compensation review process.

Award Options

Award Option	Description
Clear Award	Workday sets proposals or awards to zero, overriding any prior proposals or awards.

Award Option	Description
Keep Award Fixed	Workday updates the employee compensation data as of the CSD, but keeps the award fixed.
Update Award to...	• *Previously Entered Percent*: Workday updates the award to the previous percent. You can select this option on the Create Compensation Review Options task. • *Previously Entered Factor*: Workday updates the award to the previous factor for bonus plans with an individual performance factor. • *New Employee Target*: Workday updates the employee target, the spend, and the pool.

Related Information

Tasks

Manage Compensation Review Participation Rule Sets on page 1166

Create Compensation Review Options on page 1174

Reference: Custom Modifiers and and Employee Option Participation Rules

Workday coordinates events for custom modifiers differently depending on the Employee Option configured on the participation rule set:

For this Employee Option...	Workday...	Description
Remove Employee from Bonus	Inactivates the custom modifier.	The employee can be added back to the process and make use of the custom modifier.
Keep Employee in Bonus	Keeps the custom modifier applied to the proration segment.	This option doesn't create new proration segments. Retaining the custom modifier won't create errors.
Update Employee to Latest Data	Clears the custom modifier.	This option might create new proration segments. Retaining the custom modifier might lead to errors.
Keep Employee Data Fixed	Keeps the custom modifier applied to the proration segment.	This option doesn't create new proration segments. Retaining the custom modifier won't create errors.

Related Information

Tasks

Steps: Manage Custom Modifiers for Compensation Reviews on page 1168

Manage Compensation Review Participation Rule Sets on page 1166

Reference: Terminations During Compensation Review Processes

These termination events can occur while a compensation review process is in progress:

- *Terminate Employee*
- *End Additional Job*
- *End International Assignment*

Effects vary depending upon when the effective date, or pay through date, of the termination event occurs relative to these date parameters of the compensation review:

- Process Period End Date (PPED)
- Compensation Snapshot Date (CSD)
- Effective Date (ED)

These tables describe the effects for compensation review processes:

Merit and Stock Awards

Termination Effective Date Occurs...	Termination Event Status - Complete	Termination Event Status - In Progress
Before PPED	Workday: • Doesn't include the employee in the compensation review. • Doesn't apply the termination participation rule sets.	Workday: • Includes the employee in the compensation review. • Applies the participation rule set when the termination event completes. • Hides the Target % advanced field. • Autofills target to zero.
On or after PPED and before ED	Workday: • Includes the employee in the compensation review. • Doesn't apply the termination participation rule set.	Workday: • Includes the employee in the compensation review. • Applies the participation rule set when the termination event completes. • Hides the Target % advanced field.
On or after CSD and before ED	Workday: • Includes the employee in the compensation review. • Doesn't apply the termination participation rule set. • Sets the employee target amount as of CSD. • Autofills target to zero.	Workday: • Includes the employee in the compensation review. • Applies the participation rule set when the termination event completes. • Sets the employee target amount as of CSD.
On or after ED	Workday: • Includes the employee in the compensation review. • Doesn't apply the termination participation rule set.	Workday: • Includes the employee in the compensation review. • Doesn't apply the participation rule set.

Bonus Awards

Effective Date of Termination	Prior to Process Initiation		While Process In Progress
	Include Terminated Employees Selected	Include Terminated Employees Not Selected	

On or Before PPED	Workday: • Includes employee. • Applies participation rule set after Manage Impacted Employees.	Workday: • Doesn't include employee. • Doesn't apply participation rule set.	Workday: • Includes employee. • Applies the participation rule set when the termination event completes.
After PPED and before ED	Workday: • Includes employee. • Applies participation rule set after Manage Impacted Employees.	Workday: • Includes employee. • Doesn't apply participation rule set.	Workday: • Includes employee. • Applies the participation rule set when the termination event completes.
On or after ED	Workday: • Includes employee. • Doesn't apply participation rule set.		

Manage Compensation Reviews

Initiate Compensation Review Processes

Prerequisites

- Prepare for compensation reviews.
- Configure the *Initiate Compensation Review Process* in the Advanced Compensation functional area.

Context

You can configure the options and plans for your compensation review process. You can also include merit, allowance, one-time payment, adjustments, promotions, bonus, and stock plans.

Steps

1. Access the Initiate Compensation Review Process task.
2. (Optional) Select a Compensation Review Process Template.
3. Configure process date fields:

Option	Description
Effective Date	The effective date also determines eligibility for proposed target changes, such as the Bonus Target Amount - Proposed editable field.
Employee Visibility Date	If configured, Workday hides the employee's pay-related compensation data until after the specified date.
Process Period End Date	Configure a date to determine: • Employee eligibility for inclusion in the process. • Proration calculations. • Performance ratings.

Option	Description
	Example: If an employee is eligible for a plan on June 1, but the Process Period End Date is May 31, Workday doesn't include the employee in the process. Workday can include employees in eligibility waiting periods as of this date, based on plan setup. However, they display as exceptions with targets of zero.
Organization Snapshot Date	Select the date Workday uses to determine: • The organizations in the compensation review process and the hierarchical structure. • The organization level that stores the pools. When you initiate the process, Workday determines this once and takes into account only completed organization events. Thereafter, Workday manages in-progress organization events (moves or transfers that occur between organizations in this set) according to participation rules. Workday doesn't determine security role assignments for a compensation review process based on this date. Workday determines security when you launch the *Complete Employee Awards* step in the business process. Workday removes organizations inactivated after this date from the hierarchy and won't assign them to a planner.
Compensation Snapshot Date	Select a date for Workday to determine eligible employees in pool and award calculations. The greater the difference between the Effective Date and the Compensation Snapshot Date, the greater potential for other compensation-related events to create a conflict.

4. Select either a Grid Configuration or a Grid Profile Configuration.

   See: Steps: Configure Compensation Review Grid Profiles on page 1172.

   If your grid configuration includes merit and promotions, you can select individual promotions for further review while the compensation review process is in progress.
5. In the Process Details section, consider:

Option	Description
Currency Rate Type	Select the currency rate type to use as the exchange rate as of 12:00 AM on the Process Period End Date to calculate pools and awards. If the date is in the future, select a rate type where the exchange rate won't change before the date. Doing so ensures that Workday uses a consistent exchange rate for pool and award calculations.
Reference Currency	Select the currency for the award pools and all totals. The compensation values for employees whose pay is in another currency still display in that other currency.

6. As you complete the plan-specific sections, consider:

Option	Description
Merit Plans	Enter the Statutory Minimum% to give employees assigned to a plan and the associated plan profiles.

Option	Description
	This only applies to merit plans that have the Subject to Statutory Minimum check box selected and are effective as of the Process Period End Date.
Bonus Plans	You can select Include Employees Terminated During Process Period. If you configured Coverage Date Eligibility on 1 or more bonus plans, you can change the coverage start and end dates. Coverage dates enable Workday Payroll or Payroll Integration to associate dates with the bonus for US Fair Labor Standards Act (FLSA) reporting requirements.
Scorecard Results	Enter the results if you included a bonus plan associated with a scorecard. If you leave this blank, Workday assumes 100% attainment. If you used a compensation process template that has Autopopulate Latest Scorecard Results selected, Workday populates the most recently effective scorecard result for each bonus plan.
Stock Plans	Select a Stock Participation Rate Table or create a new one. If selected, you can't select Autofill.
Allow Award Autofill	Select to enable the Autofill button when proposing awards.
Process Period Start Date	For each merit or bonus plan, this date sets the beginning of the proration period and determines the divisor of the proration calculation. Workday sets the default as the difference between the Process Period End Date and the plan frequency. You can select a date up to 15 months before the Process Period End Date.
Exceptions by Rule	The effective date of the merit award must be on or before the additional adjustment and promotion award dates.

Result

Workday:

- Creates a *Compensation Review Process* event.
- Sends a My Tasks item to the person in the role assigned to the *Manage Impacted Employees* step of the business process.
- Applies awards in this order: merit increases, additional adjustments, and promotions. Workday uses the latest effective date configured for each subsequent award.

Next Steps

Manage employees with multiple compensation-related events.

Related Information

Tasks

Create Grid Configurations for Compensation on page 1169

Review Promotions in Compensation Reviews on page 1218

Create Stock Participation Rate Tables on page 1115

Steps: Prepare for Compensation Reviews on page 1154

Steps: Set Up the Compensation Review Business Process on page 1157

Reference

FAQ: Compensation Reviews on page 1185

Reference: Edit Tenant Setup - HCM

FAQ: Employee Visibility Date on page 1191

Examples

Example: Include Active Employees Assigned Plan During Process Period on page 1184

Steps: Add or Remove Employees to or from Compensation Reviews

Prerequisites

One or more compensation reviews process must be in progress.

Context

You can add or remove individual employees to or from in-progress compensation review processes on the Maintain Compensation Review Process Employee Participation report. If employees belong to organizations not already in the process, Workday adds the organizations automatically with a background job that runs once every hour. You can also use the Compensation Review Update New Organization Data task to add the organizations immediately.

You can remove or add back employee groups on the Mass Operation Management task.

Steps

1. Access the Maintain Compensation Review Process Employee Participation report.
2. As you complete this task, consider:

Option	Description
Employees Removed from Process	Add an employee back.
Newly Eligible to Process	Add an employee that became eligible after process initiation.
Employees in Waiting Period	Add an employee who is eligible but was in a waiting period when you initiated the process. If you selected Include Active Employees in Waiting Period on the merit or bonus plan, Workday includes employees in a waiting period but sets their target to zero. If you add employees that have completed their waiting period, Workday calculates their target.
Remove Employee from Process	Remove an employee.

Option	Description
Terminated Employees in Process	Remove a terminated employee.
New Employee Pool Contribution	Select to display pool details for merit, additional adjustment, promotion, and lump sum awards.
Remove Pool Amount	Remove pool contributions from the process, regardless of reserves or holdbacks.
Add Pool Amount	Update employee pool contributions for added employees.
Organization	If adding an employee to a compensation review, select the Organization where the employee and the related award belongs. The organization must exist before you initiate the compensation review process and have an effective date on or before the Organization Snapshot Date configured on the process. If you select an organization that's not included in the process, Workday adds it after the Compensation Review Update New Organization Data task or background job completes.
Notification	Send an email to the person identified in the Awaiting Person field.

Security: *Process: Compensation Management Plan Employee Management* domain in the Advanced Compensation functional area.

3. (Optional) Access the Compensation Review Update New Organization Data task.

   This is a background job that runs on a regular schedule. Select an in-progress compensation review. Workday automatically:

   - Detects organizations that aren't in the process but now have employees added through the:
     - Maintain Compensation Review Process Employee Participation report.
     - *Change Job*, *Move Workers*, *Request Compensation Change*, or *Change Organization Assignment* business processes.
   - Workday automatically adds new organizations provided they're both subordinate to the top level organization and existed before you initiated the process.
   - Sends a My Tasks item to the appropriate managers or planners.

   Example: If a participation rule set moves Ferryn from Quality Assurance to Engineering, Workday keeps her in Quality Assurance until this task or the background job runs. Workday then adds the organization to the compensation review and moves Ferryn to Engineering.

   Security: *Process: Compensation Management Plan Employee Management* domain in the Advanced Compensation functional area.
4. (Optional) Access the Mass Operation Management task.

   Select the *Compensation Review Maintain Employee Participation* operation type.

   Select whether to Remove or Add Back previously removed employees. Depending on your selection, you can optionally Remove All Pools or Add Previous Pool Amount.

   Security: Create a segment-based security group and add it to the Compensation Review Maintain Employee Participation segment.

Related Information

Tasks

Remove Compensation Plans from Multiple Employees on page 1028

Roll Out Compensation Plans to Employees on page 1027

Manage Compensation Review Participation Rule Sets on page 1166

Create Eligibility Rules for Compensation on page 986

Set Up Mass Operations

Change Dates and Reasons on In-Progress Compensation Reviews on page 1211

Steps: Manage Multiple Events During Compensation Reviews

Prerequisites

Configure the *Initiate Compensation Review Process* business process to meet your needs.

Context

During a compensation review process, employees can have in-progress compensation events. After you initiate the process, you can assign participation rule sets to determine how Workday reacts to these events.

Steps

1. Access the My Tasks item for the compensation review process.
2. In the Manage In Progress Processes section, click the Manage Employee Processes button.

   Workday lists employees eligible for the process that have in-progress compensation events.
3. Select participation rule sets for Termination and Parallel Events.

   For Parallel Events, select a rule set for each award type. Workday reacts to completed transactions after you launch the process.
4. Access the Compensation Review Awards On Hold Audit report and the Manage Compensation Review On Hold Events task.

   You can release on-hold leave of absence events, cancel on-hold awards, or cancel events.

   When you release a leave of absence (LOA) event, the effective date configured for the award type determines when awards take effect. Workday doesn't release awards automatically when the employee returns from leave. You can only release on hold events if the employee doesn't have any other in-progress parallel events.

   Example: Cory returns from an LOA. You manually release the on-hold event on the Manage Compensation Review On Hold Events task. The effective date on Cory's merit award determines when the award takes effect.

Result

Workday allows parallel transactions based on the eligibility rules and date ranges specified by the participation rule sets. If no parallel rule sets apply, Workday blocks compensation and staffing transactions with effective dates that fall before the Effective Date until the process completes.

Related Information

Tasks

Manage Compensation Review Participation Rule Sets on page 1166

Reference

Reference: Compensation Review Participation Rule Set Options on page 1200

Change Dates and Reasons on In-Progress Compensation Reviews

Prerequisites

Initiate a compensation review.

Security:

- *Custom/Standard Report Copy* domain in the Tenant Non-Configurable functional area.
- *Mass Operation Management* in the System functional area.
- *Worker Data: Compensation Management by Organization* in the Advanced Compensation functional area.

Context

You can use the Mass Operation Management task to change these compensation review parameters while the process is in-progress:

- Effective dates.
- Employee visibility dates.
- Reasons.

These procedures overwrite any data changed using the *Compensation Review Override Dates and Reasons* operation type on the Mass Operation Management task:

- Participation rules based on any *Use Latest Employee Data* participation options.
- Removing and adding back employees to the process using the:
    - Maintain Compensation Review Process Employee Participation report.
    - *Compensation Review Maintain Employee Participation* operation type on the Mass Operation Management task.

Note: Therefore, Workday strongly recommends that you:

- Complete your compensation planning process before running the mass operation.
- Run the mass operation immediately before finalizing your process.

Steps

1. Access the Copy Standard Report to Custom Report task.

   Copy the Compensation Review Configure Dates and Reasons Workday-delivered standard report.

   This report lists the employees eligible for changes to compensation review effective dates, visibility dates, and reasons.
2. Access the Mass Operation Management task.

   Workday recommends that you examine these date settings of the in-progress compensation review before running the mass operation: effective dates, employee visibility dates (if enabled on the tenant), compensation snapshot dates, and organization snapshot dates.

Option	Description
Mass Operation Type	*Compensation Review Override Dates and Reasons*.

Option	Description
Input Report	Select the custom report that you created in the previous step.

The validation rules for the Effective Date set on the Initiate Compensation Review Process apply when running the *Compensation Review Override Dates and Reasons* operation. The Effective Date must be:

- On or after the Process Period End Date.
- After the Organization Snapshot Date.

Security: Create a segment-based security group and add it to the Compensation Review Maintain Employee Participation segment.

3. Run the *Compensation Review Override Dates and Reasons* mass operation.

Next Steps

To see the affected employees and their updated data, create a custom report or copy the Compensation Review Configure Dates and Reasons report.

Related Information
Tasks
Initiate Compensation Review Processes on page 1205
Create Compensation Review Options on page 1174
Manage Compensation Review Participation Rule Sets on page 1166
Set Up Mass Operations

Steps: Recalculate Bonus Targets, Pool, and Awards During Compensation Reviews

Prerequisites

Context

You can recalculate bonus targets and bonus pool and awards during an in-progress compensation review.

- Bonus targets: Before the *Configure Pools* step of the process to ensure that updated targets also updates the bonus pool.
- Bonus pool and awards: After you update scorecard data and before the controller submits.

Steps

1. (Optional) Access the Compensation Review Recalculate Bonus Targets task.

   This task updates bonus targets on the bonus plans included in the compensation review process and totals for each employee whenever:

   - Eligibility rules change a profile target.
   - Profile or plan target changes.
   - Scorecard results change.
   - Rounding rule changes.
   - Matrix values change.

   See

   To update both bonus targets and pools, access this task before the *Configure Pools* step of the compensation review process. You can still update targets with this task after *Configure Pools* but doing so only updates targets, not pools.

   Workday updates nondiscretionary amounts based on updated targets. Workday doesn't change discretionary amounts entered during the compensation review.

   Security: *Process: Compensation Management Plan Employee Management* domain in the Advanced Compensation functional area.

2. (Optional) Access the Recalculate Pool and Awards task.

   This task recalculates the bonus pool and awards for in-progress compensation reviews after you update scorecard data using the:

   - Edit Compensation Scorecard task, or
   - *Put Compensation Scorecard* Enterprise Interface Builder (EIB) web service.

   Access this task after the compensation review starts and before the controller submits. As you complete this task, consider:

Update Pool and Keep Bonus Amount Fixed	Automatically selected when some approvals are complete but others aren't. Keeps bonus award amounts fixed and updates the bonus pool.
Update Pool and Keep Bonus Factor % Fixed	Only available if all approvals are complete. Workday applies the Bonus Factor % proposed against the new target with the latest scorecard results to the Award amounts and updates the bonus pool.

   Security: *Process: Compensation Management Plan Employee Management* domain in the Core Compensation functional area.

Related Information

Tasks

Steps: Pay for Company Performance on page 1092

Reference

FAQ: Merit, Bonus, and Stock Pool Calculations on page 1192

The Next Level: Bonus Calculation Consistency

Manage Compensation Review Pools

Prerequisites

Initiate a compensation review process.

Context

Workday automatically calculates pool amounts from the bottom up. Workday uses the plan definitions selected when you initiate the process and the employees identified in the *Manage Impacted Employees* step to calculate the individual employee target amounts for each award type. Workday adds the individual employee target amounts to determine the estimated cost and the initial pool amounts.

When you're using statutory minimums, Workday calculates an employee's individual target amount as the higher percentage of the plan target and the statutory minimum. Example: If a plan target is 3.0% and the statutory minimum is 2.0%, the employee individual target amount is 3.0%.

You can change the initial pool amounts and adjust the pool amounts for individual merit, bonus, and stock plans by selecting the Top-Down option.

Before configuring pools, consider whether you need to recalculate bonus pools with these tasks:

- Compensation Review Recalculate Bonus Targets.
- Recalculate Pool and Awards.

See: Steps: Recalculate Bonus Targets, Pool, and Awards During Compensation Reviews on page 1212

Steps

1. Access the My Tasks item for the compensation review process.
2. As you complete the Pool Controls section, consider:

Option	Description
Allow Pool Holdbacks	Select to enable the distribution of less than 100 percent of the pool amounts to the organizations.
Allow Pool Overage	Select to enable managers to give awards greater than the assigned pool amount when proposing awards. This displays as selected and read-only if you hid any award type in the Pool and Spend section on the Create Compensation Review Options task.
Display Remaining Pools	Select to enable managers to see remaining pool amounts when proposing employee awards.
Override Statutory Minimum	Displays only if there's a merit plan in the process with the Subject to Statutory Minimum check box selected.

3. As you complete the pool sections, consider:

Option	Description
Top-Down	Select this option if you want to set the pool amounts at the top level of the organization.
Apply Merit Target to Current Target Amounts	Select to configure a pool based on the merit target of each employee or any configured amount.
Deduct From Merit Pool	Select to deduct the spend from the merit pool rather than creating a separate pool. The associated target pool doesn't display to planners, but calculated spend displays in the merit pool.
Bottom-Up	Select to have Workday calculate the pool amount and estimated cost based on the employees assigned to the selected merit plans.
Pool Amount	If you selected Top-Down Calculation, specify the portion of the Total Eligible Earnings to make available for distribution to employees.

Option	Description
	Workday automatically sums all the individual target amounts for the employees assigned to the merit plans included in the process. This updates the Percent of Eligible Earning.
Percent of Eligible Earning	If you selected Top-Down Calculation, specify the percent of the Total Eligible Earnings to make available for distribution to employees. This affects the Pool Amount field.
Total Eligible Earnings	Displays the sum of all employee total compensation amounts using either: • Total base pay. • The total primary compensation bases associated with the plan and assigned to the selected merit plans.
Estimated Cost	Displays the sum of all the individual target amounts for the employees assigned to the merit plans in the process.
Prefill Employee Awards	Select to have Workday populate employee awards on the compensation review process and display the Propose All button. The Prefill Employee Stock Awards check box doesn't display if you selected a Stock Participation Rate Table on the Initiate Compensation Review Process task. Depending on how you configured Autofill and Pre-Fill options on the Create Compensation Review Options task, Workday populates award values for: • *Compensation Matrix*: To the midpoint of the matrix. • *Target*: With the funded, prorated target associated with the plans.

4. As you complete additional adjustments, allowance plans, lump sums, and promotions, consider:

Option	Description
Deduct From Merit Pool	Select to deduct awards made to employees during the process from the merit pool rather than from a separate pool. If you don't select this check box, Workday creates a separate pool for the award.
Distribute to Organizations	If you're creating a separate pool, selecting this check box enables you to distribute the pool to supervisory organizations.
Compensation Basis	Available when the Deduct From Merit Pool check box is cleared. Workday determines the list of values from the compensation bases associated with employees from the selected merit plans.
Percent of Compensation Basis	Available when the Deduct From Merit Pool check box is cleared. Workday calculates total eligible earnings by: • Identifying employees assigned to the merit plans selected for the process. • Summing the total compensation amount for these employees using the selected compensation basis.

5. (Optional) Click Review Plan Funding to adjust a specific plan funding amount.

   You can adjust the pool amounts for individual merit, bonus, and stock plans. Doing so affects the total pool amount and Workday automatically selects the Top-Down option.

   The Funding % automatically populates 100 percent for merit and stock plans. The funding percent for bonus plans equals the weighted result % of the plan funding scorecard. You can change the percentage to less than or greater than 100.
6. Distribute pool amounts.

   During the *Distribute Pool* step of the compensation review process, Workday estimates organizational-level pools for each award type based on the plans you selected at process initiation.

   Whether holdbacks or remaining pools display depends on:

   - The plans you selected for the process.
   - Your selection on the Allow Pool Holdbacks check box.
   - Your role in the organization structure. You can see the holdbacks of subordinate organizations but not those of superior organizations.

   Workday initially sets holdbacks and remaining pools to zero but they can change as you distribute pool amounts to organizations. Workday subtracts the distributed amount from the total pool to calculate holdbacks.

   When you submit, Workday recalculates pool distributions and updates the actual pools, taking into account any changes made during the *Distribute Pool* step. Workday might create organizational pool adjustments, both positive and negative, to persist the top-level pool. Workday also takes into account any employee pools removed during the *Distribute Pool* step.

   You can also access the Recalculate Pool and Awards task.
7. Enter the estimated pool amounts or units that you want to distribute to each organization in the Pool Distribution Summary.

   When you change an estimated amount for a parent organization, Workday adjusts each child organization proportionally.

   Example: The Sales & Marketing hierarchy has a Sales organization and a Marketing organization, each with a pool of 100 USD for a total pool of 200 USD. If you change the total pool of 200 USD to 150 USD, Workday reduces both the Sales and Marketing pools by 25% to 75 USD. The holdback amount is 50 USD.

   Review the estimated cost of the awards for the company to the actual distributed pool amounts plus holdbacks. You can apply the original contribution, the new contribution, or replace the original contribution for employees manually removed from the process.

   For the merit awards, the values include any additional awards, lump sums, promotions, and one-time payments. Total Process Award Pools are pool amounts for additional award types where you didn't select Deduct From Merit Pool and Distribute to Organizations.
8. (Optional) Click Compensation Review Process Maintain Pools.

   As you make adjustments for each Organization and award type, Workday:

   - Locks the pools so that no other task that adjusts pools can complete until you click Review or Cancel.
   - Adds the Distribution amount to the appropriate Holdback when you reduce or remove it.

   You can use the Pool Reserve column to increase the overall pool after you initiate the process without affecting employee targets. Example: Senior management distributes additional stock several days after the compensation review process starts. You can add a Pool Reserve to the top-level organization to distribute the additional stock to employees.

If the Compensation Review Process Maintain Pools task is locked and the administrator owning the lock is unavailable to unlock it, use the Unlock Compensation Review Maintain Pools Sessions task. When you unlock a pool maintenance session, Workday discards any pending changes.

Example: Keith left for vacation without submitting his changes. Kristen accesses the Unlock Compensation Review Maintain Pools Sessions task to unlock Keith's pool maintenance session. Workday discards Keith's changes, but Kristen accesses the pool maintenance task, makes updates, and submits. The compensation review then moves forward.

9. Click Launch.

Next Steps

You can Review the Pool Spend Analysis charts. The Total Process Award Pools section displays pool amounts for additional award types where you didn't select Deduct From Merit Pool during the *Configure Merit Pools* step.

Related Information
Tasks
Steps: Add or Remove Employees to or from Compensation Reviews on page 1208
Reference
FAQ: Merit, Bonus, and Stock Pool Calculations on page 1192
The Next Level: Compensation Plans and Pools

Manage Awards for Compensation Reviews

Prerequisites

Initiate a compensation review process.

Context

You can review, edit, and approve recommendations across their subordinate organizations.

Steps

1. Access the in-progress compensation review process.
2. Select whether to propose awards for all organizations at once or drill down to review specific organizations.
3. (Optional) Modify the Compensate Employees - Assess Performance and Talent section.

   If you included editable fields in the Performance section of the grid configuration, you can edit these ratings if they were completed in Talent within the last 12 months.

   Note: Changes made to performance-related fields don't update ratings in Talent.
4. As you review award proposals, consider:

Option	Description
Submit All	Available if you manage more than 1 organization and you want to submit all employees at once.
Submit	Submit awards for employees within a specific organization.
Submit Directs	Available only if you selected *Next Participant Only* from the Approval Limited To prompt on the Create Compensation Review Options task. Submit proposals for organizations of your direct reports.

Option	Description
Complete on Behalf	Manually advance the entire organizational hierarchy to the current planner
Send Back	Click to send back for the organizational hierarchy to a previous planner.

Next Steps

Run these reports to review the date, time, responsible party, and notes for the last submitted change to awards:

- Compensation Review Merit Award Audit
- Compensation Review Talent Audit
- Compensation Review Bonus Payment Audit
- Compensation Review Stock Plan Award Audit

Related Information

Tasks

Steps: Add or Remove Employees to or from Compensation Reviews on page 1208
Manage Funding for Bonuses on page 1219
Create Grid Configurations for Compensation on page 1169
Steps: Manage Compensation Review Statements on page 1225

Reference

FAQ: Merit, Bonus, and Stock Pool Calculations on page 1192

Review Promotions in Compensation Reviews

Prerequisites

Security: *Process: Compensation Management Plan Employee Management* domain in the Advanced Compensation functional area.

Context

You can select promotions for further review as part of an in-progress compensation review process.

Steps

1. Access the Review Promotions in Merit task.
2. Select an in-progress Compensation Review Event.
3. Select 1 or more Organizations and optionally select whether to Include Subordinate Organizations.
4. (Optional) Select 1 or more Job Profiles.
5. Select a display option:

Option	Description
Only Promotions with Requested Reviews	Displays only those promotions previously selected for review.
Only Promotions without Requested Reviews	Displays only those promotions not previously selected for review.
None of the Above	Displays all promotions.

6. Select the promotions for review.

   Workday routes selected promotions to the *Change Job* business process only after you submit merit award proposals. Workday stores your selections in case you access this task on multiple occasions.
7. (Optional) In the *Change Job* business process, add an entry condition rule for steps not to execute when the promotion originates from a compensation review process:

Source External Field or Condition Rule	Initiated by Merit Review Process
Relational Operator	Is blank
Comparison Type	Value specified in this filter

8. In the *Change Job* business process, verify that the *Propose Compensation Change* step doesn't automatically complete after initiation when it originates from the compensation review process.

   This is to prevent Workday from applying the promotion increase before the merit increase and additional adjustment. If the same person is both the initiator and reviewer, Workday might apply the promotion increase before the merit increase and additional adjustment. To avoid automatic approval, update the entry condition rule on the *Review Compensation Change* step.

Related Information

Tasks

Steps: Set Up the Compensation Review Business Process on page 1157

Initiate Compensation Review Processes on page 1205

Manage Funding for Bonuses

Prerequisites

- Steps: Prepare for Compensation Reviews on page 1154
- Configure the *Initiate Compensation Review Process* business process to meet your organization's needs.

Context

You can change the bonus funding after you have submitted bonus amounts for individual employees. Example: Originally, bonuses totaled $1 million, but the company only pays $750,000.

Steps

1. Open the My Tasks item for *Manage Bonus Process Funding*.
2. (Optional) Update or add a company funded scorecard results.
3. Enter a percent in the Revised Funding % field.

   This is the percentage by which you want to fund the bonus pool.

Result

Workday uses the value entered in the Revised Funding % field and divides it by the original funding percent. The result is applied to the individual employee bonus amount to create the employee's new bonus amount.

Next Steps

You can add the *Manage Bonus Process Funding* as the last step in the compensation review business process.

Compensation Statements

Steps: Create Wage Theft Prevention Notices

Context

To meet requirements set for your organization or regulatory jurisdiction, you can provide employees with a statement that specifies their:

- Rates of pay, including overtime and doubletime.
- Basis of wage payment.
- Allowances.
- Regular payday.
- Employer name, address, and telephone number.
- Workers' Compensation Insurance carrier name, address, telephone, and policy number.

Note: Workday enables you to store and report any required data but doesn't assume responsibility for meeting regulatory requirements.

You can generate 1 or more wage theft prevention notices at any time. Alternatively, you can add the *Generate Wage Theft Prevention Notice* as a step to business processes.

Steps

1. Create a wage theft prevention notice document template using either of these:

Add Documents to Workday	Security in the System functional area: • *Document Library* domain • *Document Generation Results* domain • *Print Document Generation* domain
Concept: Workday Docs	Security in the System functional area: • *Drive* domain • *Docs* domain • *Document Library* domain

2. Create a security policy for the *Wage Theft Prevention Notice* business process.
3. Access the Maintain Event Categories and Reasons task and create reason codes for the *Wage Theft Prevention Notice* event.
4. (Optional) Configure the insurance carrier for workers.

   Access the Create Workers Compensation Carrier task and configure insurance carrier data, including the carrier's name, address, telephone, and policy number. Access the Edit Company Workers' Compensation Carrier task to associate the insurance carrier with the worker's company.
5. Configure the *Wage Theft Prevention Notice* business process.
   - You can optionally configure the *Generate Document* step so that an administrator can receive and edit the generated notice. Click Configure Generate Document and associate your document template.
   - Configure the *Review Documents* step for employees to review and acknowledge their notice. Click Configure Document Review and associate your document template to the step.

6. (Optional) Add the *Wage Theft Prevention Notice* to 1 or more of these business processes:
    - *Add Additional Job*
    - *Hire*
    - *Change Job*
    - *Request Compensation Change*
7. (Optional) Access the Generate Wage Theft Prevention Notice task to generate notices for 1 or more employees on demand.

    Security: Set up security groups for this task on the *Wage Theft Prevention Notice* business process security policy.

Result

For business processes that include the *Wage Theft Prevention Notice* process, Workday generates the notices and sends a My Tasks item to each employee in the target population. The employee must acknowledge receipt of the statement before the notice appears with their Worker Documents. You can cancel, rescind, and reassign Wage Theft Notice events.

Related Information
Concepts

Concept: Workday Docs

Tasks

Edit Business Processes

Edit Business Process Security Policies

Steps: Set Up Workday Docs

Steps: Set Up Total Rewards Statement

Context

Set up the Total Rewards statement to display a breakdown of base pay, bonuses, health and other benefits, stock, commissions, and so on.

Steps

1. Access the Create Total Rewards Section task.

    As you complete this task, consider:

Option	Description
Title Text	Enter a title for the section.
Explanatory Text	Enter explanatory text or instructions for your section.
Quicklink	Enter an external web site URL for the section.
List / Table	Select list or table format.
Group Title	Enter a title for the Group.
Column Header Override	Enter your own labels for the primary and comparison columns.
Item	Select 1 or more Compensation, Benefits, or Payroll items. You can emphasize the item, override the item name, or provide explanatory text. If you select an item in the Comparison column set, the statement displays the primary and comparison items together.

Option	Description
	If you select an item from the Payroll categories of Earning/Deduction or Pay Component Groups, you must also select a Balance Period. You can also display the item if the value is zero or hide the value.

Security:

- *Reports: Total Rewards Statement (Results - Security based on Pay Component Security)* domain in the Core Payroll functional area.
- *Self Service: Total Rewards* domain in the Core Compensation functional area
- *Self-Service: Total Rewards Dashboard* domain in the Core Compensation functional area.
- *Set Up: Total Rewards* domain in the Core Compensation functional area.

2. Access the Create Total Rewards Rule task.

   A total rewards rule specifies criteria that apply to a subset of workers. These workers see their statement filtered through the template that uses the rule.

   Security: *Set Up: Compensation* domain in the Core Compensation functional area.
3. Configure Total Rewards Templates on page 1222.

   Templates enable you to:

   - Display compensation, benefits, and payroll data by country.
   - Display a targeted view that highlights commission-related compensation or executive packages.

Result

The Total Rewards Statement is available to a worker that meets these conditions:

- The worker matches the criteria specified in a total rewards rule.
- A total rewards template uses that rule.

Workers who meet these conditions can view Compensation > View Total Rewards from the related action menu. Workday displays the total amount that would result from a summation of compensation, benefit or payroll data. Workday displays all amounts in the currency of the base compensation.

Next Steps

You can view the Total Rewards Dashboard.

Configure Total Rewards Templates

Prerequisites

Security: *Set Up: Total Rewards* domain in the Core Compensation functional area.

Context

You can create a total rewards template that enables you to:

- Display compensation, benefits, and payroll data by country.
- Display a targeted view that highlights commission-related compensation or executive packages.

The total rewards template consists of:

- A condition rule that controls which workers can view their statement through the template.
- The total rewards sections that display on the statement.

Steps

1. Access the Create Total Rewards Template task.

   See: Steps: Set Up Total Rewards Statement on page 1221.
2. As you complete this task, consider:

Option	Description
Total Rewards Rule	Don't use a rule that: • Another template is already using. • Includes workers associated with another template.
Summary Display Text Override	(Optional) Enter an override for statements made up of only nonannual values. Enter up to 100 characters to override the default annual frequency displayed on the statement. Example: If all items on your Total Rewards Statement display monthly values, enter Monthly.
Disclaimer Text	(Optional) Enter text that displays at the bottom of the statement.
Rounding Rule	(Optional) Select a rule created with the Create Compensation Rounding Rule task. Workday rounds decimal values on the Total Rewards Statement according to the rule that you select. However, Workday doesn't round stock values.
Section Group Title	Enter a title for the section group.
Do Not Sum	(Optional) Select if you don't want the value of all the items in this section added to the grand total or displayed in the Total Rewards graphic.
Section	Enter a Section configured on the Create Total Rewards Section task.
Display Employee Cost	(Optional) Select to display any employee-paid portion of the compensation components in this section. Example: The employee pays for some health benefits. If selected, Workday adds a column to the table that displays the employee cost.

Next Steps

Access the Total Rewards Template Audit report to display the employees associated with more than the 1 template.

Related Information

Concepts

Setup Considerations: Manager Insights Hub on page 2933

Tasks

Translate Business Data

Steps: Create Custom Compensation Review Statements

Prerequisites

- Download and install Workday Studio, including Report Designer, from Workday Community.
- Enter *.rptdesign* in the File Type Set Up Instructions field on the Edit Tenant Setup - System task.
- Assign the Report Writer user group to the user modifying the report.

- Familiarize yourself with the Workday Studio documentation and tutorials for Report Designer.

Context

Workday provides 3 compensation review statement formats. You can create custom statements by defining a business form layout using Workday tasks and Report Designer in Workday Studio.

Steps

1. Download the report design attachments from Workday Community: Compensation Review (Merit) Statement on Workday Community.
2. Make a copy of the Print Compensation Review Statement report.
    a) Access the Copy Standard Report to Custom Report task.
    b) Select the Print Compensation Review Statement report from the Standard Report Name prompt.
    c) Rename the report.
    d) On the Share tab, click the appropriate share option.
    e) Save the report.

    Use the Compensation Review Employee Adjustment for Statements report data source to ensure you can release and generate statements on the Release Compensation Review Statement task.
3. Save the report data (XML) and XML schema (XSD) for later use in Workday Studio.
    a) As a related action off your custom Print Compensation Review Statement report, select Web Service > View URLs.
    b) Select Workday XML > REST > Workday XML.
    c) When the XML source code displays, save it as an XML file to your local drive.
    d) Select Workday XML > XSD > XSD.
    e) When the XSD source code displays, save it as an XSD file to your local drive.

        Use the Save Page As feature in your browser. Don't copy and paste the text from the browser.
4. Use Workday Studio to create a new report layout for the report design downloaded from Workday Community.
5. Associate your custom Print Compensation Review Statement report with the new report layout.
    a) Access the Create Business Form Layout task.
    b) In the Report Design prompt, select Create > Create Custom Business Form Report Design Attachment.
    c) Browse for the report design that you downloaded from Workday Community.
    d) Click Upload.
    e) In the Custom Report field, select your custom Print Compensation Review Statement report.

Example

This statement is now available for selection in the Create Compensation Review Statement Rule task. You can select it as the default layout or can associate it with 1 or more eligibility rules.

Related Information

Tasks

Create User-Based Security Groups

Reference

Reference: Edit Tenant Setup - System

Steps: Manage Compensation Review Statements

Prerequisites

- Approve employee compensation review awards.
- Create custom compensation review statements.

Context

You can generate compensation review statements and make them visible to administrators and managers before, on, or after the effective date of the compensation review process.

You can include the Release Compensation Review Statement in the *Initiate Compensation Review Process* business process or access it as a standalone task.

Note: If you provide your employees with a custom statement report outside of the Release Compensation Review Statement task, a high volume of print jobs might affect performance.

Steps

1. (Optional) Access the Edit Tenant Setup - HCM task and select the Disable Create New Compensation Review Statement functionality for Employee on View Compensation Review Statements check box.

   If selected, this hides the Create New Statement button on the View Compensation Review Statement History view for Employee as Self.
2. Access the Release Compensation Review Statement as a standalone task if it isn't included as a step in the *Initiate Compensation Review Process* business process.

   As you complete this task, consider:

Compensation Review Statement Rule	Select a rule that defines the statement layout. You can create rules on the Create Compensation Review Statement Rule task.
Statement Release Date	You can select a date before, on, or after the effective date of the compensation review process. Workday releases statements at 12:00 AM on this date according to the time zone of each employee's location.
Generate Statement PDF	If selected, Workday generates compensation review statement PDF files on the configured start date, time, and time zone for all employees in compensation review process.

   Security: *Process: Compensation Management Plan Employee Management* domain in the Advanced Compensation functional area.

   See also: FAQ: Employee Visibility Date on page 1191.
3. (Optional) Access the Set Compensation Review Statement Visibility task to make statements visible for employees immediately.

   You can only use this task for a given organization and compensation review:

   - After you've run the Release Compensation Review Statement task.
   - Before either the Effective Date or the Employee Visibility Date configured on the compensation review.

Option	Description
Organization	Select an organization with a completed compensation review process.

Option	Description
	You can optionally include subordinate organizations.
Completed Compensation Review Process	Select a completed compensation review process for the organization that you selected. Workday displays only processes completed within the last 18 months and released with the Release Compensation Review Statement task.
Statement Visible	Available only after you've generated the statement PDF. If selected for the individual employee, Workday makes the statement visible. Example: You have meetings scheduled with 3 of your employees later today. Select these 3 employees to make their statements visible immediately.

If you don't run the Set Compensation Review Statement Visibility task, Workday makes compensation review statements visible to employees on the latest of either the Employee Visibility Date or the Effective Date configured on the compensation review process.

Security: *Worker Data: Compensation Review Statement Visibility* domain in the Advanced Compensation functional area.

4. Access the View Compensation Review Statements report.

   This report enables you to:

   - Generate compensation review statements for multiple employees.
   - Print compensation review statements in batch mode as a single PDF file.
   - View compensation review statements for employees after you've released them and generated the PDF.

   Security: *Worker Data: Compensation Review Statements* domain in the Advanced Compensation functional area.
5. Run the *Compensation Review Maintain Released Statements* mass operation.

   - Create a custom report using the All Compensation Review Process Employee Adjustments report data source.
   - Access the Mass Operation Management task. As you complete the task, consider:

Option	Description
Mass Operation Type	*Compensation Review Maintain Released Statements*.
Input Report	Select the custom report that you created.

You can:

- Delete all released statements.
- Delete those statements for a target population specified by an eligibility rule.
- Generate new statements.

Security:

- *Mass Operation Management* in the System functional area.
- *Compensation Review Maintain Employee Participation* in the Advanced Compensation functional area.

Related Information

Tasks

Steps: Set Up the Compensation Review Business Process on page 1157

Reference

[FAQ: Employee Visibility Date] on page 1191

2023R1 What's New Post: Compensation Review Statement Generation and Delivery

FAQ: Compensation Review Statements

When can I access the Set Compensation Review Statement Visibility task?	• After you release the statement on the Release Compensation Review Statement task. • Before either the Effective Date or the Employee Visibility Date configured on the compensation review.
What happens when I don't use the Set Compensation Review Statement Visibility task?	Workday makes compensation review statements visible to employees on the latest of either the Employee Visibility Date or the Effective Date configured on the compensation review process.
Why do some reports show US Pacific Time when I selected my local time zone for PDF generation?	Workday generates compensation review statement PDF files as of the start date, time, and time zone you configure on the Release Compensation Review Statement task. However, Workday stores your selection in U.S. Pacific Time and displays U.S. Pacific Time on some reports. Example: September 10 2:00 PM Japan Standard Time is 10:00 PM U.S. Pacific Time. From your Tokyo office, you select Generate Statement PDF and configure:
Can I include ***Release Compensation Review Statement*** as a step in the compensation review process?	Yes, you can add Release Compensation Review Statement as a step in the *Initiate Compensation Review Process* business process.
How can I delete statements that have been released and are no longer needed?	Access the Mass Operation Management task and run the *Compensation Review Maintain Released Statements* mass operation type.

Prompt	Selection	Workday Stored Value
Start Date	09/10/2023	09/9/2023
Time	2:00 PM	10:00 PM
Time Zone	GMT +9:00 Japan Standard Time (Tokyo)	GMT -8:00 Pacific Time (Los Angeles)

Severance Plans

Steps: Manage Employee Severance

Prerequisites

Set up compensation elements and eligibility rules.

Context

You can manage how you compensate terminating employees:

- Create a severance matrix and worksheets.
- Assign a severance package to an employee.
- Integrate with Workday Payroll to pay out the severance package either as a lump sum or continual payments upon termination.

  Note: For third-party payroll users, use the Maintain External Payroll Input for Worker task for ongoing severance.

When using Workday Payroll for France to calculate and report statutory termination payments, you must manage employee severance payments directly through pay components or pay input.

Steps

1. Access the Maintain Event Categories and Reasons task and configure the *Post Termination Compensation* and *Severance Assignment* events.

   Security: *Set Up: Staffing* in the Staffing functional area:
2. Set up these business processes to meet your needs:

Business Process	Configuration Details
Severance Worksheet	Make sure that the *Deliver Severance Worksheet* step is the completion step.
Request Post Termination Compensation	Use this process if you don't plan on using severance.
Termination	Workday recommends that you configure the *Review* or *Approval* steps as the completion step. Doing so ensures the fields shared with severance worksheets aren't changed between the *Review* or *Approval* steps and the termination completion step.

   Security in the Core Compensation functional area:

   - *Set Up: Severance Packages*
   - *Severance Worksheet*
   - *Worker Data: Severance Worksheets*
3. Access the Maintain WARN Period task to configure WARN periods for different locations.

   Workday automatically populates the correct WARN period on the severance worksheet based on worker locations.

   Security: *Set Up: Severance Packages* domain in the Core Compensation functional area.

4. Create Severance Matrix on page 1229.

   Workday uses a severance matrix to calculate severance amounts, severance payment dates, and notification dates based on length of service and eligibility rules.
5. Create Severance Packages on page 1231.

   Specify the components that are part of the severance event, such as early retirement, plant closing, or reduction in workforce.
6. Create Severance Worksheets for Workers on page 1233.

   Create a worksheet that calculates and adjusts the estimated cost for terminating an employee.
7. Present the severance policy to the employee outside of Workday.
8. Complete Severance Package Assignments on page 1235.

   Record dates when you informed the employee of their severance and when they signed or declined.

   You can use the Edit Severance Worksheet Dates task to update the signed, declined, or revocation cutoff dates after termination is complete without changing other worksheet data.

Related Information

Tasks

Manage External Payroll Input for Worker

Reference

The Next Level: Severance in Workday

Create Severance Matrix

Prerequisites

Security: *Set Up: Severance Packages* domain in the Core Compensation functional area.

Context

Create a severance matrix to determine:

- The compensation basis Workday uses to calculate the severance.
- The duration of severance payments both before and after the termination date.

Steps

1. Access the Create Severance Matrix task.
2. Select an Effective Date.

   You can add a severance matrix to a severance package after the effective date.
3. Select 1 Basis option and 1 Duration option to determine the severance matrix type:

Option	Description
Compensation Basis Range	Create the severance matrix based on a compensation basis range.
Service Length Basis Range	Create the severance matrix based on a service year compensation basis.
Specific Duration Entries	Create the severance matrix based on a specific duration amount. You can qualify who receives an amount according to length of service and eligibility rules.

Option	Description
Length of Service Multiplier	Create the severance matrix based on a duration amount as a multiplier of length of service.

4. Configure options applicable to the severance matrix type:

Option	Description
Duration Unit	Enter the units for the minimum and maximum ranges for each matrix band (row).
Length of Service Unit	Available if you based the severance matrix type on Service Length Basis Range. The options available depend on the units used to define the minimum and maximum length of service.
Calculate Compensation Basis As Of Date	Available if you based the severance matrix type on Compensation Basis Range. Select the relative date from which Workday calculates the compensation basis and determines eligibility for the matrix band.
Compensation Rounding Rule	Available if you based the severance matrix type on Length of Service Multiplier. Workday rounds the calculated severance or notice duration according to the selected rounding rule created on the Create Compensation Rounding Rule task.
Multiplier Order	Available if you based the severance matrix type on Length of Service Multiplier. Select when Workday performs rounding, before or after multiplication.

5. As you complete the severance matrix eligibility bands (rows), consider:

Option	Description
Minimum / Maximum Compensation Basis Range	Available if the severance matrix type is Compensation Basis Range. Enter the minimum and maximum values of the compensation basis range. You can enter up to 2 decimal places. Workday uses this range to determine eligibility for this matrix band.
Minimum / Maximum Length of Service	Available if you based the severance matrix type on Service Length Basis Range. Enter the minimum and maximum values of the length of service in Duration Units. You can enter up to 2 decimal places if the length of service is under 1 year. The minimum value of the next range must be equal to the maximum value of the previous range. Example: • Range 1: From 1.00 through 10.00. • Range 2: From 10.00 through 20.00.

Option	Description
	Workday uses this range to determine eligibility for this matrix band.
Eligibility Rules	Limits the severance matrix to a specific group of employees.
Duration	Available if you based the severance matrix type on Specific Duration Entries. When combined with Duration Units, defines how long an employee is entitled to receive severance or notice. If you enter zero, eligible employees don't receive severance pay.
Length of Service Multiplier	Available if you based the severance matrix type on Length of Service Multiplier. Specifies how long an employee is entitled to receive severance or notice when multiplied by the Minimum Years of Service and Duration Units. If you enter zero, eligible employees don't receive severance pay.
Minimum Duration	Enter the minimum duration the worker eligible for this band is guaranteed to receive. Used to validate any adjustments made on the Severance Package Assignment. If you leave the field blank or enter zero, Workday doesn't enforce restrictions if any dates change on the Severance Package Assignment.
Maximum Duration	Enter the maximum duration the worker eligible for this band is guaranteed to receive, regardless of the length of service multiplier. Used to validate any adjustments made on the Severance Package Assignment. If you leave the field blank or enter zero, Workday calculates zero severance duration for the worker.

Next Steps

You can access the Severance Matrix Report to compare severance matrices to each other.

Related Information
Tasks

Create Compensation Rounding Rules on page 1165

Create Severance Packages

Prerequisites

- If your company policy includes U.S. WARN payments, specify the number of days of advance notice a worker must receive before termination.
- Configure the *Severance Assignment* event in the Maintain Event Categories and Reasons task.
- Create severance matrix.

- Security: *Set Up: Severance Packages* domain in the Core Compensation functional area.

Context

A severance package defines the types of severance pay components that an employee receives upon termination.

Steps

1. Access the Create Severance Package task.
2. Consider:

Option	Description
Reason for Severance	Determines which severance packages and reasons you can assign to the severance worksheet for an employee.
Severance Matrix	Determines start and end dates that entitle an employee to receive severance payments.
Notice Matrix	Determines how far in advance an employee is to receive notice of termination.
Service Start/End Date	Select the dates you want Workday to use when determining the length of service.
Override Compensation Basis for Ongoing Severance Calculation	Select a compensation basis to override the calculation of salary plans for Post Termination Payments *Ongoing Severance Pay*. Workday evaluates which compensation basis to use in this order: a. The selected override compensation basis. b. The highest compensation basis the employee is eligible for. c. The total base pay compensation basis.
Termination Payouts	Configure 1 or more Severance Payouts that define single payment lump sums paid with the final paycheck. Select the One-Time Payment Plan Payroll and Payroll Interface use to pay out the severance amount.
Estimated Time Off Payout	Select 1 or more Time Off Payout and Time Off Plans combinations you want to: • Pay out at termination. • Display in the severance worksheet cost estimations.
Service Instructions	Configure 1 or more service instructions that apply to the employee. For each instruction, select an option and enter instructions.

Next Steps

Assign the severance package to an employee.

Related Information

Tasks

Create Severance Worksheets for Workers on page 1233

Create Severance Worksheets for Workers

Prerequisites

- Steps: Manage Employee Severance on page 1228
- Security in the Core Compensation functional area:
  - *Set Up: Severance Packages*
  - *Severance Worksheet*
  - *Worker Data: Severance Worksheet*

Context

You can create severance worksheets to calculate severance duration and amounts.

You can create and assign a severance worksheet to:

- A rehired employee each time they're rehired.

  Example: Don is a seasonal employee you rehire each year for several weeks to help with accounting and tax preparation. You assign a severance worksheet to Don each time you rehire him.
- An employee that you plan to terminate, is currently being terminated, or is already terminated.

If you create a severance worksheet on a date for a pay period where the worker doesn't have a payroll result, retro will be unprocessed.

You can also use the *Create Severance Worksheet* web service.

Steps

1. Access the Create Severance Worksheet task.
2. Select a Target Termination Date.
3. Select a Reason for Severance.

   Workday calculates the Notify By date by subtracting the Duration from the Target Termination Date.

   Example: A Target Termination Date of December 31 minus a 14-day Duration equals a Notify By Date of December 17.
4. In the Termination Dates section, consider:

Option	Description
Last Day At Work	Must be on or before the Target Termination Date.
Target Termination Date	Last day the employee's status is active, which must equal the end date of the last continuation payment plan. Changes in duration or start dates on continuation payment plans change this date.
Pay Through Date	Last day of compensation for an employee. Workday calculates this using the severance matrix associated with the package. Note: The Pay Through Date on the severance worksheet might differ from the Pay Through Date in the termination event.

Option	Description
	Workday uses the Pay Through Date from the severance worksheet to determine severance payment durations in the *Severance Worksheet* business process. However, if any of these conditions are true, Workday uses the Pay Through Date from termination events: • Worker doesn't have a completed severance worksheet. • None of the worksheets associated with the worker have Send to Payroll enabled. • *Termination* is complete after the delivery of the worksheet, and you entered a Pay Through Date in the *Termination* process that differs from the one in the worksheet.

5. For each Severance Calculation listed, consider:

Option	Description
Duration	Automatically populates from the matrix assigned to the package.
Start Date	This date affects the dates of subsequent payout amounts. You can edit the Start Date of the Payment Type listed first but it must match the Target Termination Date. You can't edit the start dates of subsequent payment types. Workday sets these to the day following the End Date of the previous payment type.

Result

Workday sends a notification to the role assigned to the *Review Severance Worksheet* action in the *Severance Worksheet* business process. After assignment approval, Workday sends a notification to the role assigned to the *Deliver Severance Worksheet* action in the business process.

Next Steps

To view in-progress or completed events, use the Severance Process Status report.

Related Information

Concepts

Concept: Retro Leave of Absence

Tasks

Steps: Set Up Proration

Reference

Setup Considerations: Payroll Proration

Troubleshooting: Proration

FAQ: Unprocessed Retro Changes

Examples

Example: Set Up Pay Run Category for Active and Terminated Workers
Example: Set Up Pay Run Category for Active and Terminated Workers (FRA)
Example: Set Up Pay Run Category for Active and Terminated Workers (UK)

Complete Severance Package Assignments

Prerequisites

Assign severance packages to employees.

Context

To complete the severance package, you must record the:

- Date that you presented the severance package to the employee.
- Date by which the employee must accept or decline the severance package.
- The actual date the employee accepts or declines the severance package.

If you want this step to complete only if specific information is entered, add validations to the *Deliver Severance Worksheet* step of the *Severance Worksheet* business process.

Steps

1. Access the My Tasks item for Severance Worksheet.
2. In the Severance Actions section, consider:

Option	Description
Send to Payroll	If selected, Workday uses the Severance Worksheet to: • Populate data in the *Termination* process, unless a termination process is already in place for the employee. • Create compensation events for the employee's severance. You can only select Send to Payroll on 1 severance worksheet per employment. If left blank, Workday won't associate the severance worksheet with the *Termination* process or generate compensation events.
Severance Response Due	The deadline for the employee to sign and accept the severance package.
Worksheet Delivered	The date the employee received the documents detailing their severance package.
Notified Employee	The date you notified the employee of their severance package.
Worksheet Signed	The date the employee signed their severance package.
Worksheet Declined	The date the employee declined their severance package.
Revocation Cutoff	The deadline for the employee to change their mind after signing their severance package.

Option	Description
	Displays when you enter a Worksheet Signed or Worksheet Declined date.

3. (Optional) Access the Edit Severance Worksheet Dates task.

   You can update the Signed Date, Declined Date, or Revocation Cutoff dates after termination is complete without changing other worksheet data.

Request Compensation Change After Termination

Prerequisites

- Define the steps for *Request Post Termination Compensation* business process.
- Define reasons for the *Post Termination Assignment* event using the Maintain Event Categories and Reasons task.

Context

You can request a salary or hourly plan assignment for an employee 1 day after the employee's termination date up to the employee's Pay Through Date. The termination date and the pay through date is defined from either the process or the employee's severance package.

Workday uses the Pay Through Date from a severance worksheet to pay severance and to determine payment durations in the *Request Post Termination Compensation* business process.

Note: Workday recommends that you use either the *Request Post Termination Compensation* business process or severance, but not both simultaneously.

Steps

1. Access the Request Post Termination Compensation task.
2. As you complete this task, consider:

Option	Description
Effective Date	Enter the effective date for this request. The date must be 1 day after the termination date and 1 day before the pay through date.
Employee	Only terminated employees that match the requirements of the effective date are available for selection.

3. Complete the proposed compensation.

   If there was already a salary or hourly plan in the post-termination section of a severance package, Workday displays it as deleted. However, you can restore them.

   Workday doesn't calculate retroactive payments.

Related Information

Tasks

Steps: Manage Employee Severance on page 1228

Terminate Employees on page 699

Benefits

Set Up Benefits

Steps: Set Up Benefits

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

Set up your benefit plans for health, insurance, and retirement savings.

Steps

1. Manage Benefit Coverage Types on page 1243.

   Define categories of health care, health savings, retirement plans, spending account, and insurance plans. Benefit coverage types are linked to enrollment events. These events define the types of benefits that employees can gain or lose with a benefit event. Coverage types help define benefit plans.
2. Access the Maintain Health Care Classifications task.

   Health care classifications refer to types of provider organizations such as *PPO*, *EPO*, *HMO*, and *DHMO*.
3. Define benefit coverage targets.
   - Create Health Care Coverage Targets on page 1246.
   - Create Insurance Coverage Targets on page 1247.
4. Create Benefit Providers on page 1248.
5. Create Enrollment Events on page 1343.

   Identify
   - Events that trigger benefit gains and losses.
   - The coverage types an employee can lose or gain with each event.

   Examples:
   - Open enrollment.
   - Termination.
   - Birth of a child.
6. Create Enrollment Event Rules on page 1349.

   For the enrollment events you created, define the conditions of coverage. Examples:
   - Coverage begin and end dates.
   - Increase limits.
   - Evidence of insurability requirements.
   - Waiting periods.
7. Set Up Benefit Electronic Signatures on page 1255.
8. Create Benefit Eligibility Rules on page 1255.

   Define rules that group workers together or exclude workers from specific benefit elections.

9. Create Benefit Groups on page 1249.

   Define groups of workers for similar benefit plans and elections based on the eligibility rules.
10. Define benefit plans.

    See Steps: Set Up Employee Benefit Plans on page 1288.
11. Configure passive events.

    Manage benefit gains and losses that result from the passage of time rather than from online changes to employee data.

    See Steps: Set Up Passive Events on page 1441.
12. Set up benefit credits and surcharges.

    See Steps: Manage Benefit Credits and Surcharges on page 1390.
13. Define cross benefit plan dependencies and rules.

    - Create Cross Plan Enrollment Prerequisites on page 1382 to make enrollment in one or more primary plans a prerequisite for enrollment in a secondary plan.
    - Create Cross Plan Insurance Coverage Maximums on page 1384 to place a coverage limit on the combined total of 2 or more insurance plans.
    - Create Cross Plan Insurance Percentage Maximums on page 1386 to limit plan coverage to a percentage of the total coverage in 1 or more other insurance plans.
14. Create instructional text to help workers complete their benefit enrollments.

    See Set Up Benefit Enrollment Instructions on page 1253.
15. (Optional) Set Up Auto-Enrollment for Benefit Plans on page 1381 that automatically enroll an employee if they don't complete their benefit elections.
16. Create Benefit Plan Year Definitions on page 1418.

    Define the collection of benefit plans that are valid for a given year or other plan period. For retirement savings, define a separate plan year if you don't have re-enrollment each year.
17. Set up benefit eligibility for employees that have multiple jobs.

    See Steps: Set Up Multiple Jobs for Benefit Eligibility on page 1402.
18. Configure requirements for evidence of insurability.

    See Steps: Set Up Evidence of Insurability on page 1453.
19. Set up COBRA automation for US employees.

    See Steps: Set Up COBRA Automation on page 1457.
20. Set up Affordable Care Act reporting for US employees.

    See Steps: Set Up Affordable Care Act Measurements and Eligibility on page 1466.
21. Set up individual benefit rates for private health insurance plans.

    See Steps: Manage Individual Benefit Rates on page 1268.

Next Steps

Set up open enrollment.

Related Information

Tasks

Steps: Set Up Open Enrollment on page 1414

Reference

The Next Level: Solutions for Global Benefits

Setup Considerations: Benefits for Mergers and Acquisitions

You can use this topic to help make decisions when planning your configuration and updates resulting from a merger or acquisition. 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

When you're part of a merger with or acquisition, you can use Workday Benefits to update your benefit plans and transition employees to new or changing benefits.

Business Benefits

If you continue to use Workday for benefits as a result of a merger or acquisition, you can:

- Save effort by adding new benefit groups, providers, plans, and events to your existing tenant configuration.
- Can easily import new workers, while preserving existing worker data.

Use Cases

- Transition employees to new or change benefit elections.
- Change payroll earnings and deductions for new or updated benefit plans.
- Gather and import Affordable Care Act 1094-C and 1095-C data for new employees.

Questions to Consider

Question	Considerations
Will an acquired company keep their current benefits?	If yes, you can add plans and providers to Workday. If not, you can add them to existing plans with new benefit groups.
Do you have new locations?	Consider adding new benefit groups for new locations, especially if they are in a different country.
Do you need to run an off-cycle open enrollment event for new employees?	The simplest way to trigger benefit elections is through the hire process. However, if you need to change plans for existing employees, you can run an off-cycle open enrollment event. You need to: • Create a new benefit group to trigger the off-cycle open enrollment. • Update your benefits defaults for the new group.
After a merger, who is eligible for your new benefit plans?	You can update eligibility rules to ensure that new employees are only eligible for any new benefit groups. You can run the *View Workers in Multiple Benefit Groups Audit* job to check your eligibility rules.
Do you have new providers?	You need to create new providers if new employees have unique providers. Also, if you have a new location, your existing providers might

	not be available there so you might need to find new providers.
Do you have new benefit plans?	If you create new providers, you need to create new plans. With new plans, you: • Need to configure the rules that define eligibility for the plans and the benefit groups. • Can work with payroll to create new deductions or earnings for the new plans.
Do you have new vendors?	You can check the Workday Cloud Connect for Benefits catalog for Workday-provided vendor templates.

Recommendations

- To maintain a clear enrollment history for new employees, create a new open enrollment event type for an off-cycle open enrollment.
- Check your rate frequencies for benefit groups, benefit plans, and pay groups. Determine whether they need to match. Example: Monthly versus quarterly.
- Consider enabling the Mobile Open Enrollment app, especially if any employees don’t have personal computers.

Requirements

Review the Open Enrollment Checklist on Community. The checklist helps you verify that you have made all new and updated changes. It can help with your questions before you begin setup.

If you run an off-cycle open enrollment event, create a benefit group for the new employees to trigger the event.

Create new benefit plans or providers. Don’t rename an existing benefit plan or provider. These changes impact current integrations and benefit enrollment history.

If you create a new event type, you need to add the new type to your enrollment event rules.

Prepare for ACA 1095-C reporting for United States employees:

- Collect and store data from prior years in case of IRS auditing.
- Ensure that you have all the data needed to file with the IRS for the acquisition or merger calendar year.
- Prepare the Import 1095-C Data EIB with any months that you include for your ACA filing that aren't already in the tenant. Consult your legal counsel to determine the correct number of 1094-Cs for each tax year.
- Be aware of any new U.S. states for your employee population. There might be state level 1095-C filing requirements.

Limitations

No impact.

Tenant Setup

In the Tenant Setup for HCM, under Benefits, you can select the Enable Mobile Benefits check box to enable the open enrollment on the Workday Benefits mobile app.

Security

Domains	Considerations
Set Up: Tenant Setup - HCM in the Systems functional area.	Enables the administrator to enable or disable benefit configuration options in the Edit Tenant Setup - HCM task
Set Up: Benefits in the Benefits functional area.	Enables the benefits administrator to access open enrollment configuration tasks.
Worker Data: Benefit Eligibility in the Benefits and Personal Data functional areas.	Enables the benefits administrator to access the Benefits Eligibility by Worker report.
Worker Data: Benefits in the Benefits and Personal Data functional areas.	Enables the benefits administrator to manage worker's benefit elections, including access to the Benefits tab on the worker profile.
Worker Data: Insurance Calculated Coverage in the Core Compensation functional area.	Gives the benefits administrator access to the Calculated Coverage report field. Administrators can view individual worker's calculated coverage amounts for the plans they enroll in.
Self Service: Benefits in the Benefits functional area.	Enables employees to complete benefit elections

Business Processes

You can add worklets for embedded analytics to business process steps, providing links to additional information.

Note: Ensure that you configure the worklets on each business process.

Business Processes	Considerations
Change Benefits for Open Enrollment	Initiates open enrollment for benefits.
Change Benefits	Launches the *Change Benefits for Life Event* business process.
Change Benefits for Life Event	Initiates enrollments for life events, including births, divorce, and promotion.

Reporting

Reports or Dashboards	Considerations
Active and Completed Open Enrollment Status Report	Use this report to view and manage the status of active and completed enrollment election events. This report provides more detail than the Open Enrollment Status Report, but can take a long time to run. Workday recommends that you limit your use to managing enrollment elections *after* finalizing open enrollment events.
Benefit Corrections in Progress Audit	Use this report to view a list of benefit corrections that you've started, but not yet submitted.
Benefits Eligibility by Benefit Group	Use this report to view future-dated benefits groups. You can run the report for each benefit group using the open enrollment event date.

Reports or Dashboards	Considerations
	Compare the reports to ensure that no workers exist in more than 1 group.
Benefit Events Status Report	Use this report to view workers with benefit events and the status of those events.
Finalize Open Benefit Events	Use this task to clean up all outdated enrollment events.
Manage Evidence of Insurability Status	Use this task to clean up all outdated EOI requests.
Open Enrollment Status Report	Use this report to view and manage workers with open enrollment events. You can view the status of those events before finalizing enrollment. This report provides better performance than the Active and Completed Open Enrollment Status report.
Terminated Employees Eligible for Benefits	Use this report to view the terminated employees that can still receive benefits.
View Benefit Eligibility Rule Results	Use this report to troubleshoot to see why someone is or isn't meeting an eligibility rule.
View Workers in Multiple Benefit Groups Audit	Use this job to view workers eligible for more than 1 benefit group so that you can troubleshoot this issue. Don't use for future-dated benefit groups.
Workers for Benefit Group by Most Recent Benefit Event	Use this RDS to create a custom report that audits benefit enrollments data.
Workers no longer eligible for Open Enrollment	Use this report to view workers who aren't eligible for benefits but currently have an open enrollment event.

Integrations

Give yourself plenty of lead time for testing a new integration.

Workday Benefit Connectors:

- Providers: Workday provides integration templates through Workday Cloud Connect for Benefits (CCB). There's a CCB template for each provider. For new providers, check the Cloud Connect for Benefits catalog. You can also use third-party integrations that Workday doesn't support as part of CCB.
- Affordable Care Act: Workday provides the ACA Connectors to assist with reporting to the IRS.

When you offer a new benefit plan with the same provider, link the plan to your existing integration. Likewise, if you discontinue a plan, remove the integration link.

You can change integration maps for benefit providers to specify how values in Workday map to values in an external endpoint.

If you're introducing new benefit plans or employee locations, you'll likely need to update your integration mapping. Example: Some medical providers require a unique proprietary vendor code that you need to send for each state. You might need to map codes for states that haven't had employees.

Consider how to include payroll balances. CCB integrations can only access actual contribution amounts from Workday Payroll. If you use a third-party payroll provider, benefit integrations send estimated amounts based on the benefit plan setup.

Connections and Touchpoints

Benefits enrollment interacts with Payroll for plan-related deductions and credits.

These types of employee data drive eligibility rules for benefit plans:

- Exempt status.
- FTE.
- Job profiles.
- Management levels.
- Pay rate type.
- Scheduled weekly hours.

Compensation data can impact benefit plans like insurance.

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: Open Enrollment on page 1406
Setup Considerations: Affordable Care Act Reporting on page 1461
Concept: Checking Benefit Group Eligibility on page 1260
Tasks
Create Benefit Providers on page 1248
Create Benefit Groups on page 1249
Create Benefit Eligibility Rules on page 1255
Reference
Workday Community: Affordable Care Act (ACA) Checklist
Workday Community: Open Enrollment Checklist

Manage Benefit Coverage Types

Prerequisites

- For health care plans, create health care classifications.
- For insurance plans, create insurance coverage targets.
- For additional benefits plans, create additional benefit coverage targets.
- For plans that require coverage, create default plans and priorities.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

Define the types of coverage that you plan to offer to your workers for each benefit plan type. Coverage types provide categories that benefit plans can fit in.

Examples:

Benefit Plan	Benefit Coverage Type
Health Care	Medical, Dental, or Vision
Health Savings Account	HSA or HSA Catchup
Insurance	Basic Life or Long-Term Disability
Retirement	401(k) or 403(b)
Spending Accounts	Health Care or Dependent Care

Benefit Plan	Benefit Coverage Type
Additional Benefits	Long-Term Care or Commuter

Steps

1. Access the Maintain Benefit Coverage Types task.
2. As you complete each section, consider:

Option	Description
Name	Enter the name of the coverage type that employees see during elections. Note: Limit the length of the name because it displays in a pop-up message that confirms the selection. Names longer than 20 characters might cause Workday to truncate the confirmation message.
Classifications	Limits the coverage type to a specific health care classification.
Beneficiary Designation	Specifies whether a worker must designate a beneficiary.
Use Coverage Target	Enables the coverage targets to be associated with rates and eligibility on the benefit plan.
Plan Behavior	Select: • *Accept Amounts* and *Accept Percents* when you define the minimum and maximum amounts that an employee can contribute. During enrollment, an employee can enter the contribution as either a flat amount or as a salary percentage. • *Rates* when you want to assign specific rates for an additional benefits plan.
Only One Election	Limits employees to elect only 1 benefit plan belonging to the specified coverage type. Otherwise, employees can select more than 1 plan belonging to the designated coverage type. Examples: • You have 2 medical benefit plans, an HMO and a PPO plan, and permit workers to select only 1 of the plans. • You have 2 basic life insurance plans and permit workers to select only 1 of the plans.
Must Elect Coverage	Select if employees must elect a plan belonging to the specified coverage type during benefit enrollment (employees can't waive coverage).

Option	Description
	Note: To implement this option, define default plans and priorities using the Maintain Benefit Defaults task.
Display Employee Cost	Displays employee costs for a benefit coverage type on the employee's benefit enrollment form and various reports. Required for the coverage type of plans with employee-defined contributions.
Display Employer Contribution	Display employer contributions to a benefit coverage type on the employee's benefit enrollment form and various reports.
Flex Credits Can Be Applied	Applicable for the benefits integration with Sun Life. Identify which coverage types that you want included when: • Calculating an employee's total benefit cost. • Applying benefit credits to offset the costs.
Medical	Indicates what coverage types that you want Workday to consider as medical. Used by: • Vermont Employer Health Care Contribution Tax • Patient Protection and Affordable Care Act
Use Coverage From Plan Year End	Available for Workday Payroll and integrations based on the Payroll Interface Output File template. Calculates benefit rates and coverage using the plan year-end. Verifies that the integration attribute *Calculate Benefits as of Pay Check Date* isn't selected in the integration system.
Enable Coverage Begin Date Override	Available only to health care coverage types. Enables you to override the Workday-calculated coverage begin date for a plan.
COBRA Eligible	Indicates that a coverage type is eligible for COBRA. Select to automate COBRA eligibility checks and have the information automatically populated in the COBRA record.

Next Steps

Use the:

- Benefit Coverage Types report to view a list of all coverage types and their detailed configurations.
- Create Benefit Plan task to associate coverage types with benefit plans.
- Maintain Enrollment Event Types report to identify the coverage types that are available to employees as part of an enrollment event.
- Create Enrollment Event Rule task to define the requirements and conditions of enrollment.
- Maintain Custom Validations task to create custom validations for enrolling employees in coverage types.

If you've enabled coverage begin date override, override the coverage begin date of a plan on the *View Summary* page of a benefit election. This only applies to elections processed with the *Change Benefits for Life Event* business process, or the Correct Benefits task.

Related Information
Reference
2023R2 What's New Post: Coverage Begin Date Override

Create Health Care Coverage Targets

Prerequisites

- Define employee relationship types.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

Define health care coverage targets to control who can enroll in health care plans. Example: Employee Only, Employee + Spouse, or Employee + 1 Child.

The Derived Coverage Targets feature requires that each Name (coverage target) must have a unique combination of the Minimum Dependent Count, Maximum Dependent Count, and Valid Dependent Types. If you configure 2 coverage targets to be functionally identical, Workday cannot select which one to use for the Coverage field when you change benefit elections.

Steps

1. Access the Maintain Health Care Coverage Targets task.
2. As you complete the task, consider:

Option	Description
Display Order	Controls the order in which coverage targets display on the benefit enrollment form.
Minimum Dependent Count	Enter the minimum number of dependents that can be covered. Examples: • *Employee Only* can't enroll any dependents; Minimum Dependent Count = 0. • *Employee + Spouse* can enroll 1 dependent; Minimum Dependent Count = 1. • *Employee + Family* can enroll 1 - 9 dependents; Minimum Dependent Count = 1.
Maximum Dependent Count	Enter the maximum number of dependents that can be covered.

Option	Description
	Examples: • *Employee Only* can't enroll any dependents; Maximum Dependent Count = 0. • *Employee + Spouse* can enroll 1 dependent; Maximum Dependent Count = 1. • *Employee + Family* can enroll 1 - 9 dependents; Maximum Dependent Count = 9.
Valid Dependent Types	Identify the dependent types that are eligible for coverage. You can select only those relationships that have blank, *Dependent*, or *Beneficiary* in the Restrict to Relationship field on Maintain Related Person Relationships task. Example: Define *Child* and *Spouse* as Valid Dependent Types for a target group that includes *Employee + Family*.
Requires Enrollment	Select this check box if you want to require that an employee with this dependent type be enrolled in the health care plan. If you have more than one dependent type selected in the Valid Dependent Types field, Workday requires that an employee's dependent type match one of the listed types.
HSA Coverage Target	If employees are eligible for health savings accounts (HSAs), associate each health care coverage target with an HSA coverage type.

Result

Use the:

- Maintain Health Care Coverage Targets task to edit coverage targets.
- Health Care Coverage Targets report to view a list of all coverage targets and detailed information for each.

Related Information

Tasks

Manage Personal Relationship Types on page 1498

Steps: Set Up Benefits on page 1237

Create Insurance Coverage Targets

Prerequisites

- Define dependent or beneficiary types.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

Define insurance coverage targets that control who can enroll in insurance plans. Example: *Employee Only* and *Domestic Partner*.

Steps

1. Access the Maintain Insurance Coverage Targets task.
2. As you complete the task, consider:

Option	Description
Maximum Dependent Count	Enter the maximum number of dependents covered. Examples: • *Employee Only* can't enroll any dependents; Maximum Dependent Count = 0. • *Spouse* can enroll 1 dependent; Maximum Dependent Count = 1. • *Dependents* can include all children; Maximum Dependent Count = 99.
Valid Dependent Types	Identify the dependent types that are eligible for coverage. You can select only those relationships that have blank, *Dependent*, or *Beneficiary* in the Restrict to Relationship field on the Maintain Related Person Relationships task. Example: Define *Child* and *Spouse* as Valid Dependent Types for a *Family* target group.

Result

Use the:

- Maintain Insurance Coverage Targets task to change coverage targets.
- Insurance Coverage Targets report to view a list of all coverage targets and the detailed information for each.
- Maintain Benefit Coverage Types task to associate coverage targets with insurance coverage types.

Related Information
Tasks
Manage Personal Relationship Types on page 1498
Steps: Set Up Benefits on page 1237

Create Benefit Providers

Prerequisites

- Define benefit provider identifier types with the Maintain Benefit Provider Identifier Types task. Example: Medical, Dental, or Retirement Savings.
- Define electronic signature text.
- Create an integration system for the provider.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

You can set up health care, insurance, or retirement planning providers and map them to the appropriate benefit plans.

Note: You can't change a provider after creating a benefit plan. Create a new plan with a different provider.

Steps

1. Access the Create Benefit Provider task.
2. As you complete the task, consider:

Option	Description
Carrier URL	Select the carrier website link to display additional plan or enrollment details.
Electronic Signature	Select the electronic signature text to display at the end of benefit election pages. The statement informs employees that their name and password are valid electronic signatures.
Benefit Program Partner	Select to create benefit program cards for this provider.

Next Steps

Access the Create Benefit Plan task to associate the provider to benefit plans.

Related Information
Tasks
Set Up Benefit Electronic Signatures on page 1255
Create Integration System

Create Benefit Groups

Prerequisites

- Create benefit eligibility rules.
- Define enrollment event rules.
- Set up benefit credits.
- Security:
    - *Set Up: Benefits* in the Benefits functional area.
    - *Manage: Benefits for Organizations* in the Benefits functional area.

Context

Workday enables you to create dynamic benefit groups. Using eligibility rules that define membership criteria, Workday automatically assigns employees that meet the criteria to that group.

Example: Use eligibility rules to assign executive management staff to a single benefit group, salaried employees to a second group, and hourly employees to a third group.

Note: When you create benefit groups, only include workers who are eligible for any benefits. When you launch open enrollment, all included workers receive open enrollment notifications to participate, even if they can't make benefit elections.

You can also define how Workday applies benefit credits or offsets for a specific benefit group or a coverage type within the group.

Steps

1. Access the Create Benefit Group task.
2. On the Group Rules tab, consider:

Option	Description
Enrollment Event Rule	Defines how Workday processes changes in coverage for the benefit group.
Waiting Period Calculation Order	Calculates the start date for a benefit plan when an enrollment event has both a waiting period and a begin date.
Frequency	Defines the frequency displays during benefit enrollment and when viewing current benefit elections.
Country	Defines the country in which the benefit group is valid. This option is useful if you have employees in multiple countries, and would like to assign 1 country to this benefit group. For enrollment event types that you set up by country, select the country used in the Restricted to Countries field on the Create Benefit Event Type task.
Enrollment Signature Line	Adds an employee signature line on the printable enrollment summary and the printable beneficiary designation page.
EOI Takes Effect On Date	If you don't select a date, Workday automatically selects the approval or denial date.
Calculate Remaining Pay Periods as of Period End Date	Used to calculate the number of remaining deductions for health savings accounts and spending accounts. Select this check box to include all pay periods that end in the plan year, even if the payment date is outside the plan year.
Include Pay Periods that End Before the Deduction Begin Date	Used to calculate the number of remaining deductions for health savings accounts and spending accounts. Select this check box to include pay periods that end before the Deduction Begin Date, if they have a payment date after the Deduction Begin Date.
Adjust Final Pay Period Deductions in Workday Payroll to Meet Annual Goals	Calculates a variable HSA or spending account deduction for the final pay result of the year if Workday can't evenly divide the total deduction amount across paychecks. Example: You have 24 pay periods and the employee selects a $2000 election. The value per pay period is approximately $83.33, but totals $1999.92 across all pay periods. To meet the exact $2000 goal, Workday can adjust the deduction in the final pay period to $83.41.

Option	Description
	When selected, enter a threshold percentage of 1% or more in the Maximum Percent Change from Previous Deductions field. The worker needs to have an HSA or spending account deduction on the next to last pay result of the year. Workday uses the threshold percentage with this deduction to determine the amount of the final deduction, rounding up or down. If the amount needed to true up the final payment is outside of the maximum percentage change, Workday doesn't add or subtract any amount. Example: The next to last pay result is $100 and you set the Maximum Percent Change from Previous Deductions check box to 1 percent. Workday Payroll can add or deduct an additional $1 from the last pay result to true up the deduction. You can't select this option if you select the Calculate Remaining Pay Periods as of Period End Date check box.
Calculate As Of	Defines the date Workday uses to calculate the employee age.

3. On the Benefit Credits tab, consider:

Option	Description
Enable Benefit Credits	(Optional) Select to enable benefit credits for the benefit group.
Enable Remaining Benefit Credits	(Optional) Select Enable Remaining Benefit Credits, to display the remaining credits and credit offsets to workers during enrollment on their benefits statements.
Display Benefit Credits in Enrollment	(Optional) Select to display benefit credits and offsets during an enrollment event.
Excess Credits to Health Spending Account (Canada)	Available if you clear Enable Remaining Benefit Credits. Applicable only with the benefits integration for Sun Life and when you select Flex Credits can be Applied check box on the Maintain Benefit Coverage Types task. Clear this check box if you want to add unused credits to employee-taxable income. To calculate the cash value of unused flex credits, enter an earning in the Earnings and Deductions field.
Source Coverage Type for Unused Plan Credits	Add the coverage types from which you can select unused plan credits.

Option	Description
Benefit Group Credits	Assign benefit credits and bundles to this benefit group.
Earnings Code	Select any applicable earning codes for the benefit group.

4. Assign credits to coverage types in the Coverage Types Credit grid. Consider:

Option	Description
Coverage Type	Coverage types created in the Maintain Benefit Coverage Types task.
Credits if Eligible	The credits available for the coverage types that meet eligibility rules for the benefit group.
Credits if Elected	The credits available if members of the benefit group elect the coverage type.
Credits if Waived	The credits available if members of the benefit group waive the coverage type.
Earnings Code	The earning codes for the coverage type.

5. Select deduction offsets and their priority to help defray benefit plan costs with credits. Consider:

Option	Description
Coverage Type	Select coverage types that have the Flex Credits can be Applied check box selected in the Maintain Benefit Coverage Types task.
Benefit Credit Offset Order	To indicate a higher priority, enter a lower value.

6. Map obsolete plans to new ones.

   Use the Benefit Plan Mappings tab to replace any obsolete benefit plan with another. During open enrollment, Workday converts employees to the new benefit plan. Successful conversions require:

   - Coverage targets between the old and new plans must be the same for health care and additional benefit plans.
   - Insurance coverage targets between the 2 plans must be the same.
   - The coverage levels and coverage type for the old insurance plan must match the new plan.
   - Dependents in health care and insurance plans must meet the eligibility rules for the new plan.
   - The employee contribution type (% or flat amount) in retirement plans must be the same.
   - The minimum and maximum values/max values must be the same in the retirement plans.
   - The currency in the old plan must match the new plan.
   - A benefit enrollment event.

   Best Practice: When a benefit plan becomes obsolete, you can use the Do Not Use check box in the Create Benefit Plan task to hide the plan in any Benefit Plan prompt.

Next Steps

- Test the eligibility rules for your benefit group, ensuring that workers have 1 group assignment each.
- Associate the benefit with a benefit plan using the Create Benefit Plan task. Not all workers in a benefit group have to qualify for the same benefit plan. You can define eligibility criteria at the plan level to limit certain plans to subgroups within the larger benefit group.

- Enable benefit group persistence to use eligibility information that Workday saves daily. You can select the Use Persisted Benefit Groups check box in the Edit Tenant Setup - HCM task. Workday tasks frequently check eligibility, and using this option can improve performance.

Related Information

Concepts

Concept: Checking Benefit Group Eligibility on page 1260

Tasks

Steps: Set Up Benefits on page 1237

Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Reference

Reference: Edit Tenant Setup - HCM

Set Up Benefit Enrollment Instructions

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

You can provide instructions that display on the enrollment landing and plan selection pages to help workers with their benefit enrollments. You can also provide alternate instructions to specific benefit groups, benefit event types, or both.

Steps

1. Access the Maintain Enrollment Instructions task.
2. Select 1 of these options:
    - General Enrollments Sections: These sections include the landing page, benefit plans, and other types of instructions related to enrollment elections. Examples: Health Care and Evidence of Insurability.
    - Tobacco Use Sections: These sections enable you to configure instructions for employee and dependent tobacco use questions.
3. As you complete the General Enrollment sections, consider:
    - Target where and for who Workday displays instructions by selecting benefit groups, enrollment event types, or the 6 benefit plan types. You can select more than 1 filter. Workday prioritizes filters in this order: Coverage Type, Enrollment Event Type, and Restrict to Benefit Groups.
    - Click Format Text to add links to external websites or documents.
    - You can't remove or customize the enrollment confirmation message. Workday automatically displays this message when workers complete their enrollment successfully, before your configured instructions in the Submit Elections Confirmation section.

Option	Description
Restricted to Benefit Groups	(Optional) Select benefit groups that need to view the specialized instructions, questions, and responses. You might want to use this option to meet regional or national requirements, or for contract employees.
Coverage Types	(Optional) Specify 1 or more coverage types for specific instructions. You can select coverage types in these sections:

Option	Description
	• Additional Benefits Elections • Health Care Elections. • Insurance Elections. • Retirement Savings Elections.

4. (Optional) As you complete the Enrollment Tobacco Use and Dependent Tobacco Use sections, consider:

Option	Description
Restricted to Benefit Groups	Select the benefit groups that view the specialized instructions, questions, and responses. You might want to use this option to meet regional or national requirements, or for contract employees.
Question Text	Enter a tobacco use question for workers to answer. Example: Have you used tobacco in the last 12 months?
Question Responses: Text	Enter the response options that employees can select from. You can enter 2 or 3 responses. Example: You can add a third response option for Not Applicable.
Question Responses: Values	Assign either *Uses Tobacco* or *Does Not Use Tobacco* to the response. If you have a third response, you can assign either of these values to it. Assigning these values triggers any tobacco surcharges or credits that you add to a benefit plan rate. Examples: You can assign *Does Not Use Tobacco* to these responses: Yes, but I'm in a cessation program or Not Applicable.
Display Question for Spouse or Domestic Partner During Enrollment	Select to enable the tobacco use question for spouse or domestic partner. Workday automatically displays the tobacco use question on the Add Dependent task and requires a response. If you don't track tobacco use, you can add a row in the Question Responses grid and enter Not Applicable in the text field. Select the *Does Not Use Tobacco* option and the Default Response check box for the row.

Note: If you hide the Tobacco Status (Dependent) localized field, during enrollment, Workday hides the tobacco question instructions for spouses and dependents.

Related Information

Tasks

Steps: Set Up Benefits on page 1237

Set Up Benefit Electronic Signatures

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

Enter the text that displays as the electronic signature on the benefit election pages.

Steps

1. Access the Maintain Benefit Electronic Signatures task.
2. Enter text for an electronic signature that Workday automatically uses for all coverage providers.

   You can add additional signature text for specific providers.

Result

When the employee submits their benefit elections, all electronic signatures that meet the defined criteria (provider, country, or benefit group) display on the Submit Benefit Election Review page.

You can use the:

- Create Benefit Provider task to associate the electronic signature text with a benefit provider.
- Benefit Electronic Signatures report to view a list detailed information for all benefit-related electronic signatures.

Set Up Save for Later

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

You can specify whether your workers can use the Save for Later button during enrollment events by locale. This button saves a draft of a worker's elections, but doesn't submit them for processing. When workers click the button, Workday displays a reminder to return to the enrollment event and submit their elections. You can enable or disable the Save for Later button. When you disable the button, Workday saves the worker's elections if they exit the enrollment event without submitting the elections.

Steps

1. Access the Maintain Localization Settings task.
2. To enable or disable the button, select *Benefits Enrollment* from the Area prompt and add or delete the locales.

Related Information

Tasks

Steps: Set Up Open Enrollment on page 1414

Create Benefit Eligibility Rules

Prerequisites

Security: *Set Up: Benefits* domain in the Benefits functional area.

Context
Create the condition rules that Workday uses to identify:

- An employee's eligibility for a benefit group.

  They provide access to benefits for a group of employees. You can have only 1 eligibility rule per benefit group. Membership in a benefit group must be exclusive. Associate each worker with only 1 group based on eligibility criteria. Otherwise, Workday can't determine which benefit plans, coverage options, and event rules apply to that worker during enrollment events.
- An employee's eligibility for a benefit plan.

  Target specific benefit plans to a subpopulation within a larger benefit group.
- A dependent's eligibility for benefits.
- Employees you must evaluate for participation in the Affordable Care Act (ACA).

Example: You can create a medical EPO plan for members of the Salaried Employees benefits group. At the plan level, you can define a worker eligibility rule to limit enrollment to residents of California. You can also use a dependent eligibility rule to limit dependent coverage to children under age 26.

Steps

1. Access the Create Benefit Eligibility Rule task.
2. As you complete the task, consider:

Option	Description
And/Or	When 2 or more logical statements exist, set the *And* or *Or* option to control how the statements interact with each other. For the expression to be true: • All conditions in an expression connected by *And* must be true. • At least 1 of the conditions in an expression connected by *Or* must be true.
(	If you want to group 1 or more logical statements together, use the left-hand parentheses to indicate the beginning of the grouping.
Source External Field or Condition Rule	You can select from delivered Workday sources or from condition rules that you've already defined.
Relational Operator	Options depend on the data type.
Comparison Type	Indicate whether to compare the specified value to the report field or subrule.
)	If you want to close the grouping of 1 or more logical statements, select the right-hand parentheses.

3. Verify that the rules work as expected:
    - Verify that the rules are returning results with the Benefit Eligibility Rules Audit report.
    - Verify that the eligibility rules don't select workers for multiple groups with the View Workers in Multiple Benefit Groups Audit report.
    - View the list of workers who meet the selection criteria for the rules with the View Eligible Workers task. If workers are missing or there are workers in the group who you shouldn't include, then refine the condition rules.
    - View a rule and whether a specific employee meets the conditions of the rule with the View Benefit Eligible Rule Results task.

Example

An eligibility rule that determines dependent benefit eligibility:

- The relationship can be Spouse, Domestic Partner, or Child.
- If the relationship is Child, then the child must have one of these statuses:
    - Disabled
    - A full-time student and 27 years or less in age
    - Less than 19 years of age

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value	)
And		Relationship	Any in the selection list	Value specified in this filter	Spouse Domestic Partner	
Or	(	Relationship	Any in the selection list	Value specified in this filter	Child	
And	(	Disabled	Equal to	Value specified in this filter	Select check box.	
Or	(	Full-time Student	Equal to	Value specified in this filter	Select check box.	
And		Age	Is less than or equal to	Value specified in this filter	26	)
Or	(	Age	Is less than	Value specified in this filter	19	))

Next Steps

Link the benefit eligibility rule to a benefit group, benefit plan, Affordable Care Are measurement period, or passive event rule.

Note: You can only have one benefit eligibility rule per benefit group, benefit plan, Affordable Care Are measurement period, or passive event rule.

Related Information

Tasks

Steps: Set Up Benefits on page 1237

Set Up Benefits Billing Reporting

Prerequisites

Configure the *Benefits Billing Event* business process default definition and security policy in the Benefits functional area.

Context

Workday enables you to designate a benefits billing status for employees who are maintaining their benefits contributions while they're not receiving pay. Benefits billing statuses are used for reporting and tracking, and have no impact on payroll.

You can configure the *Benefits Billing Event* business process to enable employees to designate how they prefer to contribute to their benefits when they go into a nonpay status, such as when they request a leave of absence. Benefits Administrators can also create a benefits billing event for an employee at any time.

Steps

Edit Business Processes.

Add the *Initiate Benefits Billing* step on these business processes:

- *Change Benefits for Life Event*
- *Request Leave of Absence*

Add the *Review Benefits Billing* step on the *Request Return from Leave of Absence* business process.

Result

When an employee changes their benefits for a life event, or requests a leave of absence, Workday generates a benefits billing event. The employee receives a My Tasks task in which they select Direct Pay or Payroll Deduction for each coverage type they're enrolled in and contribute a nonzero amount to.

When an employee requests a return from leave of absence, Benefits Administrators receive a My Tasks task in which they review and update the employee's benefits billing event.

Next Steps

Self-service users can:

- Access the View My Benefits Billing History task from the related actions menu of their worker profile.
- View the My Benefits Billing History tab in the Benefits section of their worker profile.

Benefits Administrators can access the Create Benefits Billing Event standalone task to create a benefits billing event for an employee.

Run a custom report to track workers who are in a nonpay status while maintaining their benefits, and how they prefer to pay for each coverage type.

Access the Maintain Custom Labels task to override the terms Direct Pay and Payroll Deduction with your organization's preferred terms.

Related Information

Concepts

Concept: Leave of Absence Business Processes on page 2602

2024R1 What's New Post: Benefits Billing Reporting

Tasks

Create Custom Reports

Steps: Set Up Benefits Messaging

Prerequisites

You must subscribe to the Workday Messaging SKU to send SMS messages. See Steps: Set Up Workday Messaging. You can still send emails and push notifications without the Workday Messaging SKU.

Context

You can send employees branded emails, SMS messages, and push notifications related to their benefits and open enrollment. You can leverage Workday Notification Designer to create notification templates and add email branding to your messages and open enrollment reminders. You can also leverage message templates as a starting point in your benefits messages to ensure consistency. Sending messages helps to improve employee responsiveness and open enrollment completion rates. You can send benefits messages ad-hoc or as a part of open enrollment reminders from the Open Enrollment Details view.

Steps

1. Edit Domain Security Policies.

   Configure the *Send Benefits Messages* domain in the Benefits functional area. To send open enrollment reminders, configure the *Process: Open Enrollment* domain in the Benefits functional area.
2. Access the Edit Tenant Setup - Notifications task.
   a. In the Notification Delivery Settings section, select the HCM parent notification type, and navigate to the Benefits Notification and Open Enrollment for Benefits notification types.
   b. If you want benefit notification settings for either of these types to be different from the parent HCM settings, select the Override Parent Notification Type Settings check box.

   Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
3. (Optional) If you choose to override the parent notification type settings, Create Notification Routing Rules.

   Add your preferred communication channels. You can select Mobile Push Notification, SMS, and Email. Set the notification frequency to Immediately.
4. (Optional) Create and Activate Notification Templates.

   Set up Notification Designer. When creating your notification templates, select the:
   - Benefits Notifications notification type to create a notification template for benefits messages.
   - Open Enrollment for Benefits notification type to create a notification template for open enrollment reminders.
5. (Optional) Create message templates.

   See Steps: Set Up Message Templates. When you configure security for the *Set Up: Message Templates* domain, add the same security groups you've added to the *Send Benefits Messages* domain. This ensures the groups you want to send benefits messages can also access the message templates. Then, select the:
   - Benefits Notifications notification type to create a message template for benefits messages.
   - Open Enrollment for Benefits notification type to create a message template for open enrollment reminders.

Result

You can access the Send Benefits Messages task or reroute to it from the Send Open Enrollment Reminders action.

Example

Next Steps

To send:

- Ad-hoc messages, access the Send Benefits Messages task. See Send Benefits Messages.
- Open enrollment reminders, select the Send Open Enrollment Reminders action from the Open Enrollment Details view. See Send Open Enrollment Reminders to Employees.

Related Information
Concepts
2024R2 Feature Release Note: Benefits Messaging

Concept: Checking Benefit Group Eligibility

Workday tasks frequently access workers' eligibility for a benefit group, which can impact performance. Workday saves the workers' eligibility status to improve the performance of these checks.

Workday performs a daily check for benefit group eligibility and saves (persists) the results. You can use these results to improve the performance of tasks, reports, and integrations that Workday has enabled.

Enable persistence with the Edit Tenant Setup - HCM task by selecting the Use Persisted Benefit Groups check box. Hover over the check box name to see what tasks, reports, and integrations Workday has enabled to use the saved values.

You can run the View Workers with Different Eligible and Persisted Benefit Groups report to determine whether to use the check box at any given time. The report displays any workers with eligibility differences for an effective date between:

- The current benefit group.
- The most recent persisted benefit group as of the effective date.

Depending on the results, you can:

- Use the saved eligibility results by selecting the Use Persisted Benefit Group check box.
- Access the Schedule Benefit Group Detection task and update the saved values.
- Use current eligibility by clearing the Use Persisted Benefit Groups check box.

If you have workers with changes, you might want to opt out temporarily. You can opt in or out at any time.

Related Information
Tasks
Create Benefit Groups on page 1249

Custom Validations

Concept: Custom Validations for Benefits Enrollment Events

You can create custom validations for benefits open enrollment and life events. You can create critical error or warning messages to display when a worker makes a mistake while electing their benefits. Custom validations prevent Workday from processing benefit elections that you identify as invalid or incomplete. With the Maintain Custom Validations task, you can configure custom validations for these types of election options:

- Benefit Coverage Types
- Benefit Elections
- Benefit Employee Enrollment Event

Security

The Maintain Custom Validations task is secured to the *Set Up: Custom Validations* security domain in the System functional area.

Examples

You can use custom validations for benefit events in these and other use cases:

- To require attachments for new dependents.
- To require the same coverage target levels on unrelated plan types.
- To enforce whole numbers (Examples: beneficiaries; retirement plans).
- To prevent workers from waiving a plan under certain conditions.
- To prevent increases or decreases to the contribution percentage during a life event.
- To prevent the enrollment of multiple spouses or domestic partners.

Note: When creating custom validations, ensure that you don't use quotes or special characters in the description. Examples: @, #, $, &.

See Steps: Set Up Custom Validations. Workday displays the error message when it processes the transactions that meet the conditions for the validations.

Translation

You can translate validation text with the Translate Custom Validation Notifications task.

Web Services

You can use these web services with custom validation for benefits election events:

- *Get Custom Validation Rules*
- *Put Custom Validation Rules*

Report Fields

You can use report fields as is and to create calculated fields for the custom validation rules.

On the Benefit Election business object:

- Changed Benefit Plan Selection
- Increased Insurance Coverage
- Previously Elected

On the Enrollment Offering business object:

- Any Attachments on the Benefit Event?
- Changed Benefit Coverage Level or Target
- Changed Contribution Percent or Amount
- Changed Dependents on Coverage Type
- Dependent Added to Coverage Type
- Enrollment Event for Enrollment Offering
- Enrollment Offering Type
- Waived Benefit Coverage Type

Considerations

As you use custom validations for enrollment events, consider:

- Warnings and errors display when the worker clicks the Submit button on the enrollment event.
- Custom validations don't display when using the Correct Benefits task to correct a benefit event.
- Custom validations don't support effective dates.
- The *Change Benefits* and *Enroll in Retirement Savings Plans* web services don't support custom validations.
- The Workday mobile app only supports custom validation for critical errors on benefit enrollments. Validations that are warnings don't display to users on mobile devices.

Related Information

Tasks

Steps: Set Up Custom Validations

Set Up Custom Validation Serverity and Conditions

Configure Custom Validation Messages

Examples

2023R2 What's New Post: Custom Validations for Benefits Enrollment

The Next Level: All Things 2023R2 in Benefits

Example: Custom Validations to Prevent Multiple Spouses

Context

This example demonstrates how to create a custom validation to prevent a worker from enrolling more than one spouse or domestic partner in a benefit plan. We create 2 calculated fields, create the validation rule, and then add the validation message to the related actions of the validation.

Prerequisites

Security: *Set Up: Custom Validations* security domain in the System functional area.

Steps

1. Create the first calculated field.
    a) Access the Create Calculated Field task and enter these values:
        - Field Name: *Is Spouse or Domestic Partner*.
        - Business Object: *Dependent*.
        - Function: *True/False Condition*.

    b) Click OK.
    c) On the Calculation tab, enter these values:
        - Field: *Relationship*.
        - Operator: *In the selection list*.
        - Comparison Type: *Value specified in this filter*.
        - Comparison Values: *Domestic Partner* and *Spouse*.

    d) Click OK.
2. Create the second calculated field.
    a) Access the Create Calculated Field task and enter these values:
        - Field Name:*Benefit Election - Count of Spouse or Domestic Partner Dependents*.
        - Business Object: *Benefit Election*.
        - Function: *Count Related Instances*.

    b) Click OK.
    c) On the Calculation tab:
        - Related Field: *Dependents*
        - Count: Select the Instances where condition is true option and select *Is Spouse or Domestic Partner* from the list.

    d) Click OK.

3. Create the custom validation.
    a) Access the Maintain Custom Validations task.
    b) Select Benefit Election on the left panel.
    c) Click New Validation for *Critical* severity.
    d) Enter *Add only 1 spouse or domestic partner.* in the Description field.
    e) In the Rule Conditions grid, enter these values:

Field	Value
Source External field or Condition Rule	*Benefit Election - Count of Spouse or Domestic Partner Dependent*
Relational Operator	*Greater than or equal to*
Comparison Type	*Value specified in this filter*
Comparison Value	*2*

    f) Click OK.
4. Configure the validation message.
    a) From the related actions menu of the *Add only 1 spouse or domestic partner.* custom validation, select Validation > Configure Validation Message.
    b) Select the Text option and enter this message: *Add only 1 spouse or domestic partner*. Click OK.
    c) Add another row and select the External Field option. Enter this text: *Benefit Coverage Type*. Click OK

Result

If workers attempt to enroll more than one spouse or domestic partner as a dependent, they receive a critical error that prevents them from making an enrollment error.

When workers create an additional spouse or domestic partner as a dependent during an enrollment event, Workday creates a Dependent Event transaction in the background. The worker will see the duplicate dependent when viewing their dependents. You can create a report to audit for duplicate dependents so that you can delete the duplicates.

Related Information
Tasks
Steps: Set Up Custom Validations
Set Up Custom Validation Serverity and Conditions
Configure Custom Validation Messages

Reference: Benefits and Pay Hub

The Benefits and Pay hub provides a single location for employees to review and maintain their benefits, compensation, payroll information. Employees can also access related reports.

Security:

- *Self-Service: Benefits and Pay Hub*
- *Self-Service: Compensation History*

Note: Workday controls the visibility of any control or report in the Benefits and Pay hub by the security of the related action, report, or business process. Examples:

- Employees in a security group with access to the *Self-Service: Benefits (My Tax Documents) - USA* security domain can view and print their ACA forms.
- Employees can see the Change Retirement Savings option if you modify the business process policy for the *Change Retirement Savings* business process.

Use the Maintain Hubs task to configure the Benefits and Pay hub to display on custom dashboards. See Configure Dashboard Content. You might notice differences in visibility between tenants, such as Preview and Sandbox, if you don't migrate or set up your configuration consistently.

Worklet	Description	Additional Information
Overview	Provides a current view of an employee's benefit, pay, and compensation with links to detailed reports. Employees can view and modify payment and withholding elections, initiate benefit changes, and view arrears balances and tax documents. A Needs Attention section displays if the worker has an active benefit event for either open enrollment or life events.	
Benefits	Enables employees to: • View their current benefit elections. • View expanded details for a benefit plan from the Benefit Elections page. • View their benefits as of a specified date. • Change their benefits elections. • Change their retirement savings elections and contributions. • View their dependents. • View and edit their beneficiaries. • View and print their ACA forms.	• Steps: Set Up Employee Benefit Plans on page 1288 • Manage Dependents and Beneficiaries on page 1500
Pay	Enables employees to: • Access all their available payslips and tax documents. • Access the Most Recent Pay card to review gross and net pay on their most recent payslips. • Access the Deduction card to review deductions on their most recent payslips. • Access the Accounts section where they can view, add, or update their	• Steps: Set Up Payroll Processing • Steps: Create Earnings • Steps: Create Deductions • Define Payslips • Concept: Additional Payroll Data

Worklet	Description	Additional Information
	accounts for receiving pay. • Access links to useful payroll reports, dashboards, and tasks. • Add new or edit existing withholding elections for workers in Canada and the U.S. using the Federal, State, Local, and Provincial Withholdings buttons. Note: Workday doesn't support some withholding features, such as federal, state, and local withholding forms or multiple worksite reporting, for workers on international assignment, either in the U.S. or elsewhere. • Review and add voluntary deductions. • Review flexible payments and deductions requests. • Review arrears balances and payments. • Switch positions if they're in Canada or the U.S. and have multiple jobs. • View and update payment, tax, and tax form printing elections. • View their additional payroll data when they belong to a third-party pay group and you have configure the Additional Payroll Data feature.	
Compensation	Enables employees to: • View their bonus and one-time payment history. • Request a one-time payment for themselves (self-service), if configured. • View their compensation review statements. • View their total rewards.	• Steps: Set Up and Manage One-Time Payments on page 1124 • Steps: Enable Self-Service One-Time Payments on page 1131

Worklet	Description	Additional Information
	• View their compensation history (self-service, if configured) and a summary of each position for which they receive compensation. • View their current or upcoming period activity pay. • View their stock grants.	

Related Information

Tasks

Set Up Hubs

Reference

2025R1 Feature Release Note: Benefits and Pay Hub Enhancements

2022R2 What's New Post: Benefits and Pay Hub

FAQ: Benefit Groups

- How many benefit groups should I create for my organization?
- How do I test the eligibility rules that I create to define employee membership in a benefit group?
- How do I assign workers to a benefit group?
- How do I ensure that terminations and leaves result in a loss of coverage?

How many benefit groups should I create for my organization?

The number of benefit groups you define depends on many factors. Examples:

- Open enrollment processes by benefit group. Many organizations initiate and process open enrollment at different times for different groups of workers. Create separate groups to maintain the correct timing of your enrollment events.
- If you apply different insurance or health care rates to different categories of workers, create a separate benefit group for each category.

  Note: When you define insurance or health care plans in Workday, you can specify different rates for each benefit group that is eligible for the plan.
- In Workday, all benefit reporting is by benefit group. Consider whether the definitions for your benefit group conflict with your reporting requirements. If necessary, either consolidate workers into fewer groups or create additional groups.
- Rules and conditions of enrollment can vary for different groups of workers. Create separate benefit groups with unique

	enrollment event rules for each group if differences exist in: • Coverage begin and end dates. • Maximum coverage level or amount increases. • Waiting periods. • EOI requirements.
How do I test the eligibility rules that I create to define employee membership in a benefit group?	After defining an eligibility rule for a benefit group, you can test the rule using these audits and reports. • Benefit Eligibility Rules Audit. Run this report to verify that the eligibility rule returns results. • Select Benefit Group Eligibility Rule > View Eligible Workers from the related actions menu of the eligibility rule for a group. View the list of workers who meet the selection criteria for the rule. If any workers are missing or don't belong in the group, modify the eligibility rule. • View Workers in Multiple Benefit Groups Audit. Run this report to determine if workers belong to more than 1 benefit group. Verify that your employees belong to only 1 benefit group. If a worker belongs to more than 1 group, modify the selection criteria in your group eligibility rules. Note: When using the Benefit Job Rules, the results might not be accurate. You can run the Benefit Group Audit report to compare results. • Select Benefits > View Benefit Eligibility from the related actions menu of a benefit group. View a list of employees who meet the eligibility criteria for the group. • Workers Not Eligible for Benefits. Run this report to identify workers who don't meet the eligibility criteria for the benefit group.
How do I assign workers to a benefit group?	You don't need to assign workers to benefit groups manually. Workday automatically assigns workers to the correct groups based on the eligibility rules that control group membership. Employees can only be eligible for 1 benefit group. Run the View Workers in Multiple Benefit Groups Audit report to determine if there are workers assigned to more than 1 group.
How do I ensure that terminations and leaves result in a loss of coverage?	To ensure loss of coverage for terminations and leaves of absence, configure the eligibility rule with this condition: only active employees can participate in the group. Otherwise, Workday doesn't discontinue benefit coverage for employees in the benefit group.

Costs and Rates

Steps: Set Up Insurance Costs

Context

Workday calculates insurance costs as: (Insurance Coverage Level x Insurance Rate) = Insurance Cost

Defining insurance coverage levels separately from insurance rates enables greater flexibility. You can associate a single rate with multiple insurance coverages. You can also create an insurance coverage and associate it with different insurance rates.

You can create banded insurance rates based on these demographic factors in combination with gender and tobacco use:

- Age
- Salary
- Length of service

Steps

1. Access the Maintain Benefit Annual Rate Types task.

   Define the type of employee annual salary you want to use to when calculating benefit costs or coverage.

   Security: Set Up: Benefits in the Benefits functional area.
2. Create coverage levels.

   Access these tasks:

   - Create Amount Based Coverage Levels to create flat amount coverage levels.

     Example: For coverage levels of 100,000, 200,000, and 300,000 USD, enter:

     - 100,000 as the coverage start.
     - 300,000 as coverage end.
     - 100,000 as the coverage increment.
   - Create Percent Based Coverage Levels to create insurance coverage options for percentage of salary type insurance plans.
   - Create Multiplier Based Coverage Levels to create insurance coverage options for multiples of salary type insurance plans.

     Example: For coverage levels of 1 x salary, 2 x salary, and 3 x salary, enter:

     - 1 as the multiplier start.
     - 3 as the multiplier end.
     - 1 as the multiplier increment.
3. Create Insurance Coverages on page 1272.
4. Create Insurance Rates on page 1275.

Steps: Manage Individual Benefit Rates

Context

You can offer employees individual rates for health care, insurance, and additional benefits plans. Individual rates are helpful to companies that offer private health insurance plans to their employees along with their company-sponsored benefit packages.

Note: Workday recommends that you create a separate benefit plan for employees using individual rates. Mixing employees that use individual rates with employees that don't in the same benefit plan prevents automatic rate updates for all employees in the plan.

Steps

1. Create Health Care Plans on page 1289, Create Insurance Plans on page 1295, or Create Additional Benefit Plans on page 1313.
    a) Select the Use Individual Rate check box when setting up coverage plans, insurance coverage plans, and additional benefits plans.
    b) To revert to the rates defined on the benefit plan when a new plan year begins, select the Reset Individual Rates for New Plan Year check box.
    c) Enter zero for the employee and employer costs or enter the normal rates. These costs display on the enrollment form.
2. Submit a change in benefit elections or complete open enrollment.
    a) Employee completes a change in benefit enrollment or completes open enrollment that includes a benefit plan using individual rates.
    b) Administrator: completes changes in the employee's benefit enrollment. Or, they enter the employee's open enrollment elections, which include a benefit plan that uses individual rates.
3. Obtain individual rates from provider.

    Complete this step outside of Workday.
4. Enter Individual Benefit Rates on page 1278.

Create Health Care Rates

Prerequisites

- Security: *Set Up: Benefits* in the Benefits functional area.
- Define benefit annual rate types and assign to workers.

    To define a worker's annualized rate, select Benefits > Change Benefits Annual Rate from a worker's related actions menu.
- Define benefit credits and surcharges.

Context

Create a rate table with values that are based on:

- Flat amount
- Percent of the employee's salary
- Combination of both

Rates might also vary according to demographic information such as age, salary, or length of service.

Steps

1. Access the Create Health Care Rate task.
2. Select the Method for Rate Calculation.
3. Select the Demographic Factors to Consider.
4. If applicable, select the Tobacco check box.

    Selecting the Tobacco check box displays the Tobacco Use column in the rate table. You can enter rates in this column based on the Does Not Use and Uses questions.

5. On the Benefit Rate Source tab, consider:

   This tab displays for *percent of salary* and *percent of salary with flat amount* rate types.

Option	Description
Salary Source	If you select *Salary* as a demographic factor, specify what Workday should use to determine the correct rate band to retrieve the employee and employer rates. Select from: • *Benefits Annualized Rate or Compensation Elements:* If available, Workday uses the benefits annualized rate; if not, Workday uses compensation elements. If you select this option, the Compensation Element field becomes available. • *Benefits Annualized Rate or Total Base Pay:* If available, Workday uses the benefits annualized rate; if not, the Workday uses the base salary.
Benefit Annual Rate Type	Available if you selected *Benefits Annualized Rate or Compensation Elements* or *Compensation Elements*.
Compensation Element	Available if you selected *Benefits Annualized Rate or Compensation Elements*.
Salary Frequency	Available if you selected *Salary* as a demographic factor. Indicates whether the salaries in the rate band are weekly or monthly salaries, or use a different frequency.

Calculate As Of	If you select age, length of service, or salary as demographic factors, tell Workday what date to use in its calculations. Options are:
	• *Coverage Begin or Plan Year Begin*: If the employee had coverage as of the start of the plan year, Workday uses this date. Otherwise, Workday uses the date the employee originally enrolled in the plan.
	• *Coverage Begin or Specific Date:*
	Workday compares these dates:
	  • The date the employee originally enrolled in the benefit plan.
	  • The date entered in the Specific Month and Specific Day field.
	It uses the most recent date to retrieve the value and assumes that the year is the current benefit plan year. If you want to use the prior plan year values, select the Prior Year check box.

6. On the Rate Band Definition tab, consider:

Option	Description
Health Care Coverage Targets	Select the health care targets that you want to assign to this health care rate.
Minimum Costs/Maximum Costs	Select these check boxes to include a minimum and maximum costs in the rate band table.
First Band is 0 to Last Band is Over Bands Are Incremented By	Define the parameters Workday uses to build the rows in the rate band table. Note: Enter a value greater than zero on Bands Are Incremented By.

7. On the Final Rounding Rule tab, define how you want Workday to adjust the final calculated cost of health care coverage.

   This tab displays for *percent of salary* and *percent of salary with flat amount* rate types.

Option	Description
Round Amount To	Enter the value to which Workday rounds. Example: If you want Workday to round to the nearest whole number, enter 1.
Rounding Rule	You can: • *Round Up:* Example: The amount in this field is 1 USD, and the employee's calculated cost is 1.50 USD. Workday rounds the cost up to 2 USD. • *Round Down:* Example: The field amount is 1 USD, and the employee's calculated cost is 1.50 USD. Workday rounds the cost down to 1 USD. • *Round Up On Number:* Specify the number at which Workday rounds up or down. Example: The amount in the Round Amount To field is 1 USD, and the Round Up On Number is 0.5. Workday rounds up any costs greater than or equal to 0.5 and rounds down any costs less than 0.5. If the calculated cost is 1.49 USD, Workday rounds down to 1 USD. If the cost is 1.5 USD, Workday rounds up to 2 USD.

8. (Optional) On the Rate Bands tab, enter the *Enrollment Code* on the far right side of the table.

   Entering an enrollment code maps it to that rate band row in Workday. Example: You can map the vendor code 12345 to a Workday rate band. The enrollment code signifies that unique combination of health care benefit plan, premium, and coverage targets for the rate band. You can also change the *Enrollment Code* column label by accessing the Maintain Custom Labels task.

Result

If you selected *Benefits Annualized Rate* as the Salary Source, pay close attention to effective dates when loading the benefits annual rate. Example: You load a conversion event effective 1/1/2009, but then load the employee's compensation or Benefit Annual Rate (BAR) as of 4/1/2009. In this scenario, Workday isn't able to calculate the coverage.

The rate used to calculate an employee's benefit costs can vary based on the salary definition. Example:

- When salary = Base Salary, Workday returns a value of 50,000.
- When salary = Compensation Elements (Base Pay + Commission), Workday returns a value of 65,000 for the same employee.

In the rate table, you can associate each of these values with a different rate: 0.13 for 50,000 of salary, and 0.16 for any salary amount over 60,000.

Related Information
Tasks
Create Health Care Plans on page 1289

Create Insurance Coverages

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

Create insurance coverages that can be based on:

- Increment of Currency Coverage (flat amounts).
- Multiples of Salary Coverage (2 x salary).
- Percent of Salary Coverage (60% of salary).
- Multiples of Dependents Coverage (2 multiples on spouse and on each dependent child).

Steps

1. Access the Create Insurance Coverage task.
2. Select the Insurance Coverage to Create.
3. As you complete the task, consider:

Option	Description
Amount Based Coverage Levels name	Only available to *Increment of Currency Coverage* types.
Coverage Amounts	Only available to *Increment of Currency Coverage* types.
Salary Minimum Multiplier Salary Maximum Multiplier	Only available to *Increment of Currency Coverage* types. Define the minimum amount of coverage an employee can elect based on the salary of the employee. Example: 1x salary to 6x salary.
Minimum Amount Maximum Amount	Only available to *Multiples of Salary Coverage* and *Percent of Salary Coverage* types. Define the minimum and maximum amount of coverage an employee can elect based on the salary of the employee. Example: If the minimum amount of coverage is 50,000, and an employee making 45,000 elects 1x salary, the coverage amount based on salary is less than the minimum.

Option	Description
	If the maximum amount of coverage is 500,000, and an employee making 100,000 elects 6x salary, the coverage amount based on salary exceeds the maximum.
Salary Source	If you select *Salary* as a demographic factor, specify the rate band Workday uses to retrieve the employee and employer rates. Select from: • *Benefits Annualized Rate or Compensation Elements:* If available, Workday uses the benefits annualized rate; if not, Workday uses compensation elements. If you select this option, the Compensation Element field becomes available. • *Benefits Annualized Rate or Total Base Pay:* If available, Workday uses the benefits annualized rate; if not, Workday uses the base salary.
Benefit Annual Rate Type	Available if you selected *Benefits Annualized Rate or Compensation Elements* or *Compensation Elements*.
Compensation Element	Available if you selected *Benefits Annualized Rate or Compensation Elements*.
Round Amount To	Enter the value you want Workday to round to. Example: If you want Workday to round to the nearest whole number, enter 1.
Rounding Rule	Choices are: • *Round Up:* Example: If the amount in this field is 1 USD, and the employee's calculated cost is 1.50 USD, Workday rounds the cost up to 2 USD. • *Round Down:* Example: If the amount in this field is 1 USD, and the employee's calculated cost is 1.50 USD, Workday rounds the cost down to 1 USD. • *Round Up On Number:* Specify the number to round up on. Example: Suppose the amount in the Round Amount To field is 1 USD, and the Round On Number is 0.5. In this case, Workday rounds up any costs greater than or equal to 0.5, and rounds down any costs less than 0.5. If the calculated cost is 1.49 USD, Workday rounds down to 1 USD. If the cost is 1.5 USD, Workday rounds up to 2 USD.
Benefit Multiplier Order	Only available when you enter a value greater than zero in the Round Amount To field. Indicate when you want the rounding to occur:

Option	Description
	Example: You select the *Round Up On Number* in the Rounding Rule field and enter 400 in the Round on Number field. An employee making 50,211 selects a coverage level of 2x salary. If you select *Round Amount then Multiply*, Workday rounds the salary down to 50,000 before multiplying by 2 to determine the coverage amount: 100,000. If you select *Multiply then Round Result*, Workday multiplies 50,211 by 2 to obtain the coverage amount—100,422—and then rounds the result up to 101,000.
Do Not Round Final (If Age Adjusted)	Applies only if there is an age adjustment rule on the insurance plan. If selected, Workday doesn't round the final coverage amount. Example: An employee makes 137,177.25, which is age-reduced by 40% (0.40) to 54,870.90. With a coverage level of 0.5x, the final coverage amount (not rounded) is 27,435.45.
Spouse Amount per Multiple Child Amount per Multiple	Only available to *Multiples of Dependents* coverage. The amount of coverage per multiple of spouse or child. Example: If you elect 3 multiples with the spouse amount being $5,000 and child amount being $2,500, you will receive $15,000 in the event of the death of your spouse and $7,500 in the event of the death of a child.
Additional Coverage Amount	Only available to *Multiples of Salary Coverage* and *Percent of Salary Coverage* types. Enter a flat amount to be added to the total calculated coverage.
Multiplier Based Coverage Levels Name	Only available to *Multiples of Dependent Coverage* types.
Multipliers	Only available to *Multiples of Dependent Coverage* types.

Next Steps

- Associate the coverage with specific benefit groups on an insurance plan with the Create Benefit Plan task.
- View detailed information for a specific insurance coverage with the Insurance Coverage report.

Related Information

Tasks

Steps: Set Up Insurance Costs on page 1268

Create Insurance Plans on page 1295

Create Insurance Rates

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

Create rates containing insurance plan costs.

If rates vary by demographic factor such as age or length of service, you can add demographic bands with their corresponding rates. Workday uses this information to calculate the correct rate based on each employee's demographic information.

Steps

1. Access the Create Insurance Rate task.
2. Select the Method for Rate Calculation.

   Ensure that you select the same method as provided by your provider. Or, convert the rate amounts or percentages from the provided rate to your selected rate method:

   - The amount of coverage.
   - The amount of covered salary.
   - A flat amount (these rates are per covered individual).
   - A flat amount per covered dependent (these rates are per covered dependent).

   Note: Flat rates represent the cost of the benefit per covered individual. Example: The cost of dependent life insurance is 10 USD per month for each dependent. A worker who elects to cover a single dependent pays 10 USD per month. Another worker elects the same benefit for 4 dependents and pays 40 USD.
3. (Optional) Select the Demographic Factors to Consider.
4. (Optional) Select the Gender or Tobacco check boxes.

   If you select the Gender check box, the rate table includes a Gender column so you can enter rates based on *Female*, *Male* or *Not Declared*.

   If you select the Tobacco check box, the rate table includes a Tobacco Use column so you can enter rates based on *Do Not Use*.

   Workday creates a table with banded rates based on the selected demographic factors. You can't change these demographic factors after Workday creates the table.
5. The Benefit Rate Source tab displays for *Amount of Salary* rate types. As you complete this tab, consider:

Option	Description
Salary Source	If you select *Salary* as a demographic factor, specify what factors Workday should use to retrieve the employee and employer rates. Consider: • *Benefits Annualized Rate or Compensation Elements:* If available, Workday uses the benefits annualized rate. If not available, Workday uses compensation elements. If you select this option, the Compensation Element field becomes available.

Option	Description
	• *Benefits Annualized Rate or Total Base Pay:* If available, Workday uses the benefits annualized rate. If not available, Workday uses the base salary.
Benefit Annual Rate Type	Available if you selected *Benefits Annualized Rate or Compensation Elements* or *Compensation Elements*.
Compensation Element	Available if you selected *Benefits Annualized Rate or Compensation Elements*.
Salary Frequency	Available if you selected *Salary* as a demographic factor. Select if the salaries in the rate band are weekly salaries, monthly salaries, or use a different frequency.
Calculate As Of	If you select age, length of service, or salary as demographic factors, select the date Workday uses in its calculations. Consider: • *Coverage Begin or Plan Year Begin*: Workday uses this date if the employee had coverage from the beginning of the plan year. Otherwise, Workday uses the date the employee originally enrolled in the plan. • *Coverage Begin or Specific Date:* Workday compares the original enrollment date of the benefit plan with the Specific Month and Specific Day field. It uses the most recent date to retrieve the value and assumes that the year is the current benefit plan year. If you want to use the prior plan year values, select the Of Prior Plan Year check box. • *Coverage Begin:* Select to prevent workers from moving between age bands over time. Workday uses the date the worker first enrolled in the plan at the current coverage level. • *Event Date*: Select to enable Workday to evaluate salary band changes when a worker's salary changes. The rate changes dynamically if the worker has a salary change that moves age bands. • *Last Date of Previous Pay Period*: When an employee has a birthday that moves them into a new age band, the new age band becomes effective the pay period following the one in which the birthday occurs.

6. On the Apply Rate Per tab, consider:

Option	Description
Apply Rate Per	The value that the amount specified by the Method for Rate Calculation is divided by. Example: The Method for Rate Calculation is *Amount of Coverage*. You specify 1,000 as your Apply Rate Per amount. If the worker has a coverage amount of 40,456 USD, then Workday divides this coverage amount by 1,000, and applies the relevant Rounding Rule. Note: To get a more granular result on higher coverage amounts, divide this field value by the rate amount of 1000. Example: You apply a rate amount of 0.19 to every 1,000 USD of coverage: • Divide by 1000 and the rate amount becomes 0.00019 and Apply Rate Per is 1.0. If your coverage is 124,560 USD, the result is 23.67 USD.
Rounding Rules	Specifies how to round a coverage amount, in case the coverage amount isn't evenly divisible by the Apply Rate Per amount. Workday multiplies the rounded amount by either the Employer Cost or Employee Cost, or both, on the Rate Amount tab. • *Round Up:* Example: The employee's coverage amount is 3173.33 USD. The Apply Rate Per amount is 100. Workday rounds up to 3200 USD. • *Round Down:* Example: The employee's calculated coverage is 42,400 USD. The Apply Rate Per amount is 500. Workday rounds down to 42,000 USD. • *Round Up On Number:* The most flexible rounding rule. After Workday divides the coverage amount by the Apply Rate Per amount, it compares the remainder against the value in the Round On Number field. If the remainder is less than the Round On Number, the coverage amount rounds down. Otherwise, the amount rounds up. Example: The amount in the Round On Number field is 500. The Apply Rate Per is 1000. If the employee coverage is 1,500 USD, then Workday rounds up to 2,000 USD.

Result

Pay attention to effective dates. If you selected *Benefits Annualized Rate* as the Salary Source, pay close attention to effective dates when loading the benefits annual rate. Example: You load a conversion event effective 1/1, but then load the employee's compensation or BAR as of 4/1. In this scenario, Workday isn't able to calculate the coverage.

The rate used to calculate an employee's benefit costs can vary based on the Method for Rate Calculation.

Example:

- When Salary = Base Salary, Workday returns a value of 50,000 USD.
- When Salary = Compensation Elements (Base Pay + Car Allowance), Workday returns a value of 65,000 USD for the same employee.

In the rate table, each of these values might have a different rate in each band: 0.13 for 1 - 59,999, 0.15 for 60,000 - 129,999, and 0.16 for 130,000 - 999,999,999 USD.

Next Steps

Use the:

- Edit Insurance Rate task to edit the rates.
- Insurance Rate report to view detailed information about the rates.
- Create Benefit Plan task to associate the rates with insurance plans.

Enter Individual Benefit Rates

Prerequisites

- Complete Steps: Manage Individual Rates.
- During enrollment, the employee must elect a benefit plan that uses individual rates.
- Security: *Manage: Benefits for Organizations* in the Benefits functional area.

Context

Enter an employee's individual benefit rate for a benefit plan.

Steps

1. Access the Manage Individual Rates task.
2. (Optional) Enter criteria to target specific employees enrolled in benefit plans that have individual rates.

   Select the Include Employees with Rate Overrides check box to include these types of employees:

   - Their individual rates have been updated using Manage Individual Rates.
   - Their individual rates remain unchanged.

   Otherwise, the results only include employees with unchanged individual rates.
3. (Optional) Select the Select All - Email Notification check box if you want Workday to select the Email Notification check box next to all the employees listed.

   Later, you can override the selection for an individual employee.
4. As you complete the task, consider:

Option	Description
Rate Modified	For display only. When selected, indicates an updated rate during this session.
Employee Cost (Pre-tax)	Enter the amount of the pretax employee cost.
Employee Cost (Post-tax)	Enter the amount of the post-tax employee cost.

Option	Description
Employer Contribution (Non-taxable)	Enter the amount of the nontaxable employer contribution.
Employer Contribution (Taxable)	Enter the amount of the taxable employer contribution.

5. Enter the subject and body text for the email notification.

   This option is available if you elected to send an email notification. Workday displays a list of the employees that should receive the email.

Result

Workday assigns these new rates to the employees' benefit packages and sends the rates to Workday Benefits Network, Payroll Interface, or Workday Payroll.

Troubleshooting: Incorrect Long-Term Disability Insurance Rates

Cause	Solution
The provided Long-Term Disability (LTD) rate was based on 1 type of calculation. However, you selected an insurance rate using a different type of calculation in the LTD benefit plan. Example: The provided rate was based on Amount of Salary. You selected a rate with the method of calculation as Amount of Coverage.	Security: *Set Up: Benefits* domain in the Benefits functional area. 1. Access Edit Benefit Plan. 2. From the Benefits Eligibility and Rates grid, select an Insurance Rate based on the calculation method required by the rate you were given. Example: Select a rate from the *Amount of Coverage Rates* options.
Workday calculated the LTD coverage using the salary amount with an incorrect compensation element.	Security: *Set Up: Benefits* domain in the Benefits functional area. 1. Access the Edit Insurance Rate task. 2. Select the salary-based rate. 3. Verify that the Salary Source field displays *Compensation Elements*. 4. Select a value from the Compensation Element prompt.
The calculated coverage amount is incorrect or is zero.	Security: • *Set Up: Benefits* domain in the Benefits functional area. • *Person Data: Personal Information* domain in the Personal Data functional area. 1. Access the worker's profile to check that the effective date for compensation falls within the coverage period of the LTD plan. 2. Click the Benefits profile group and note the Coverage Begin Date for the LTD plan. 3. Click the Compensation profile group and check the worker's compensation effective date. 4. Verify that the date is on or after the Coverage Begin Date date in the LTD benefit plan.

Cause	Solution
	5. On the Compensation profile group, click the Compensation Package link. Verify that the effective date is on or after the Coverage Begin Date in the LTD benefit plan.
The coverage amount had rounding discrepancies.	Security: *Set Up: Benefits* domain in the Benefits functional area. 1. Access the Edit Insurance Rate task. 2. On the Apply Rate Per tab, adjust the Apply Rate Per value and decimal point of the rate.
Employee's rate goes up but their coverage has a cap.	Create a new rate using Amount of Coverage. Convert the rate from the provider (usually a rate of Salary) to Amount of Coverage.

Related Information

Tasks

Create Insurance Coverages on page 1272

Create Insurance Rates on page 1275

Troubleshooting: Tobacco Question Missing for Dependents

Workday skips the Tobacco Use question for a dependent and you have a benefit plan configured with tobacco rates.

Cause: You've hidden the localized field, Tobacco Status (Dependent), for the country of the employee's primary position.

Solution:

Steps

Security: *Set Up: Tenant Setup - Global*

1. Access the Maintain Localization Settings task.
2. In the Area prompt, select *Personal Information* and locate the Tobacco Status (Dependent) field.
3. Add the correct country in Allow for Countries or Regions prompt if it has listed countries, but doesn't include the required country.

Cause: Ensure that you've set up tobacco rates correctly. Otherwise, your tenant might be missing a behind-the-scenes connection between the dependent types and the coverage targets. You can create an insurance plan and a rate that uses a dependent coverage target to make this connection. This plan doesn't need to be in the benefit plan year definition.

Solution:

Steps

Security: *Setup: Benefits* in the Benefits functional area.

1. Access the Create Insurance Rate task and create an insurance rate.

   Select the Tobacco Use check box.
2. Access the Maintain Insurance Coverage Targets task.

   Verify that you have an insurance coverage target with valid dependent types of spouse, domestic partner, or dependent. If not, add a coverage target that has 1 of these valid types.

3. Access the Create Benefit Plan task to create an insurance plan.

   In the Covers prompt, select 1 of the dependent coverage targets.

   In the Benefits Eligibility and Rates grid, select the insurance rate that you've created.

Related Information

Tasks

Steps: Set Up Insurance Costs on page 1268
Create Insurance Rates on page 1275
Create Health Care Rates on page 1269
Create Benefit Surcharges on page 1398

Set Up Employee Benefit Plans

Setup Considerations: Payroll and Benefits

You can use this topic to help make decisions when planning your configuration and use of Workday Payroll and Workday Benefits. 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

When used together, Workday Payroll and Workday Benefits enable you to integrate worker benefits with their associated costs, including:

- Defining benefit plans.
- Configuring payroll earnings and deductions for benefits.
- Integrating with third-party benefit providers to handle contribution amounts.

Note: This topic only discusses how Workday Payroll interacts with Workday Benefits. It doesn't address how Cloud Connect for Third-Party Payroll (CCTPP) interacts with Workday Benefits.

Business Benefits

Reduce the risk of errors from manual entries by using Workday to pull the latest values automatically into Payroll from Benefits.

Configure security policies to prevent unauthorized users from viewing confidential benefit and payroll data.

Use Cases

- Process 401 (k), Health Savings, and Spending Account contributions through payroll.
- Process any benefit plan credits and surcharges through payroll.
- Deduct benefit plan costs for health care and insurance through Payroll.
- Configure biweekly pay schedule for 26 paychecks in a year, with HSA and spending account deductions twice a month.
- Coordinate benefits changes for leave of absence transitions from short-term disability to long-term disability.
- Process benefit changes that result from salary changes.
- Automatically enroll workers into a benefit plan based on eligibility rules.

Questions to Consider

Questions	Considerations
Do you need to apply deduction limits to benefit amounts?	If you need to apply a deduction limit to benefit amounts, configure this limit in Payroll. Example: Federal limits on retirement plans or health savings accounts. If you don't use Workday Payroll, work with your payroll provider to set limits.
Do you need to create a new deduction or earning? Or, can you reuse an existing one?	When your benefits plans change, you can reuse earnings and deductions. Note: Don't remove the mapping between an old benefit plan and the associated earning or deduction. When you remove the mapping for a worker with a supported retro event, Workday tries to rescind all deductions ever calculated for the worker in the retro recalculation. Workday recommends that you leave the old plan mapped to the deductions. You can remove the benefit plan from the benefit plan year. If you create a new plan, map it to the deductions as the active plan.
Does your weekly or biweekly payroll overlap payroll years at the end of the year?	Workday automatically processes a deduction if the pay period end date is on or after the deduction begin date. To prevent Workday from using benefit deduction rates from the wrong year, you might need to modify how Workday applies the deduction begin date. When you create or edit deductions in Payroll, you can select the coverage or cost as of the payment date. Workday processes the deduction if the payment date is on or after the deduction begin date. Workday doesn't consider in which pay period the deduction starts.
Do you want Workday to adjust the final paycheck to meet the worker's annual deduction goal for HSA and spending accounts?	You can configure a benefit group so that Workday Payroll adjusts deductions in the final pay period to meet annual goals. To adjust the final paycheck, you must configure the deduction to occur in the final pay period of that year. To enable this deduction adjustment option: • The worker must be enrolled in an HSA or spending account plan in the final pay period of the year. • The HSA or spending account must be in a benefit plan year using this calendar year (with end date of December 31).

Questions	Considerations
	• The deduction must be an HSA or spending account plan. • You must calculate remaining deductions based on the payment date as opposed to the period end date.
Do you need to manage Déclaration Sociale Nominative (DSN) reporting for France?	You can use Workday Payroll for France to declare benefits information in DSN reporting. To do so, you must: • Map benefit contributions to DSN blocks. • Enter additional benefit data, such as coverage targets, when setting up the French company tax configuration. To ensure correct DSN reporting, when setting up health care plans, don't map the same deduction to more than 1 health care benefit plan reported as prevoyance in a DSN. Use the plan that you report as mandatory health and disability coverage in a DSN.
Do you have Irish or UK-based workers?	Irish and UK legislation means that you must provide a pension plan for workers who match specific criteria. You can combine eligibility assessments in Payroll with a pension plan in Benefits. Based on the assessment results, you can enroll eligible workers into the plan.
Do you match U.S. worker 401(k) contributions?	You can configure set contributions on the benefit plan. If you calculate employer matches based on the worker's contributions, set up the calculation on the payroll deduction.
Do you enable your workers to give some of their pay regularly to an outside benefit plan or charity?	Occasionally it's impractical to provide a benefit plan, such as when it would only apply to a few workers. In that case, Workday provides alternative functionality that enables workers to request that you take voluntary deductions or flexible payments from their pay. Example: A worker wants to donate to a specific charity, or to pay back a relocation expenses loan provided by the business.
When do you want to begin and end payroll deductions for a benefit plan?	You can set up enrollment event rules to specify when to begin or end payroll deductions. You can specify when to deduct from a worker's pay by configuring: • The coverage begin date, which determines when coverage by the benefit plan starts for a worker. • The deduction begin date, which Workday uses to determine the pay period to start withholding deductions from a worker's pay.

Questions	Considerations
	Workday only withholds deductions for workers covered by a plan. It uses the combination of the coverage begin date and the deduction begin date to determine when the first deduction occurs. Similarly, you can configure when to stop payroll deductions based on a: • Coverage end date. • Deduction end date.

Recommendations

Performance	Workday recommends creating the minimum number of earnings and deductions to optimize performance. To maximize performance, set up earnings and deductions using precise criteria to streamline payroll processing. Use specific eligibility criteria so that Workday runs calculations only for applicable workers and pay and benefit groups.
Selection Criteria	To prevent possible calculation mismatches, Workday recommends that you use the same selection criteria when you create rules that: • Enroll workers into a plan in Workday Benefits. • Calculate worker contributions in Workday Payroll.
Global Payroll and Benefits	Workday recommends that you use Workday Benefits to integrate with Workday Payroll. Workday Payroll for the UK customers who don't have a license to use Workday Benefits can use limited benefits features to support the set up of UK pension auto-enrolment. If calculating payroll with Workday Payroll for France, Workday recommends using advanced lookup tables to store benefit rates to meet plan requirements.
Health Savings Accounts and Spending Accounts	To simplify the enrollment experience and deduction configurations for catch-up HSA plans, Workday recommends that employers create a separate plan for each of these age groups: • Workers under 55. • Workers 55 and older. Workday strongly recommends that you avoid using a plan for all workers with an add-on plan for workers 55 and older. If you use a deduction schedule different from the pay frequency, use both override and custom

	scheduling in Payroll to ensure correct deductions. Example: You use a biweekly pay schedule for 26 paychecks in a year, but take HSA and spending account deductions twice a month.
Benefit Earnings and Deductions	Workday recommends that you avoid removing a benefit plan from earnings and deductions. These changes can result in the over- or under-payment of prior deductions, or a lump sum deduction. Instead, remove the benefit plan from the plan year. Example: You remove an old benefit plan from the deduction and add the new plan. When you run retro calculations, Workday recalculates and attempts to rescind all prior deductions for the worker, resulting in incorrect calculation values. Consider leaving out HSA and spending plans from retro calculations. Unwanted retro calculations might occur after plan changes or when a worker meets their annual goal. Avoid using benefit plans labeled with Do Not Use. Benefit administrators can mark benefit plans with this label to hide obsolete benefit plans based on an effective date. The Benefit Plan prompt displays on the Non-Effective Dated tab for these tasks: • Create Deduction. • Create Credit. Workday appends the effective date of future-dated benefit plans to the Do Not Use label.

Requirements

Set up your benefit plans before creating the associated earnings and deductions.

If managing DSN reporting, provide the group policy number on the benefit plan and the provider ID.

Limitations

- Workday Payroll doesn't support effective dating of deductions and earnings. Instead, Workday Benefits enables you to record an effective date between benefit plans and deductions and earnings.
- To avoid processing a retroactive payroll calculation, you can make plans unavailable to workers after a certain date using:
  - Benefits eligibility rules.
  - Plan year definitions.
- Workday Payroll for the UK doesn't support pension auto-enrolment in prior pay periods. If you run payroll in arrears, you can either turn off the pension auto-enrolment feature or ensure you monitor the process and make the necessary adjustments.
- Workday Payroll for Australia doesn't support superannuation configured with Workday Benefits.

Tenant Setup

To determine allowable YTD payroll contributions, you can select an additional HSA coverage target option on the Edit Tenant Setup - HCM task. This option also enables you to configure family or individual IRS limits in Workday Payroll for the additional coverage target.

Security

Domains	Considerations
Manage: Benefits for Organizations in the Benefits functional area.	Enables you to create benefit groups.
Set Up: Benefits in the Benefits functional area.	Enables you to create benefit plans and set up enrollment.
Set Up: Payroll (Calculations - Payroll Specific) in the Core Payroll functional area.	Enables you to create and modify earnings and deductions.
Set Up: Tenant Setup - HCM in the Systems functional area.	Enables you to enable the Benefits mobile app and configure tenant options.

You can enable the benefits administrator and the benefits partner to view benefit plan deductions for workers. You can apply segmented security to custom reports based on these segmented data sources:

- Earning/Deduction Payroll Balances for Organization
- Earning/Deduction Payroll Balances for Worker
- Earning/Deduction Payroll Results for Organization (As of Sub Period End Date)
- Earning/Deduction Payroll Results for Organization, Worker, Period and Date Range (As of Sub Period End Date)
- Earning/Deduction Payroll Results for Worker (As of Sub Period End Date)

Business Processes

Business Processes	Considerations
Change Benefits	Add as step to other business processes, such as *Change Job* or *Termination*. Launches the *Change Benefits for Life Events* business process, which uses the *If there is an effect on employee benefits?* condition rule to determine whether to create a benefit event.
Change Benefits for Life Event	Enables users to change benefits for life events, including births, divorce, and promotion.
Change Benefits for Open Enrollment	Enables you to open enrollment for benefits. You can add step-related worklets with the Business Process > Maintain Step Related Worklets related action on the Change Benefits for Open Enrollment task.
Change Job	Enables you to change to a worker's position, such as promotion or a transfer, which can affect their benefits. You can add a step to launch the *Change Benefits for Life Events* business process to initiate a benefit event.

Reporting

Reports	Considerations
All Deductions All Earnings	Use these reports to verify any pay component configurations, such as which benefit plan the pay component references.

Reports	Considerations
Benefits Eligibility by Benefit Group	Use this report to view future-dated benefits groups.
DSN Benefits Contributions by Establishment	Use this report to compare benefit amounts aggregated by benefit plan and population with the aggregated payroll amounts. (For French Payroll Déclaration Sociale Nominative (DSN) reporting only.)
View Benefit Eligibility Rule Results	Use this report to determine why someone is or isn't meeting an eligibility rule. It can be useful when troubleshooting issues with deductions and credits.
View Workers in Multiple Benefit Groups Audit	Use this task with an effective date to ensure that employees are only eligible for 1 benefit group. It can be useful when troubleshooting issues with deductions and credits.

Integrations

Integration	Considerations
Cloud Connect for Benefits	Workday offers integration templates for benefit providers through Cloud Connect for Benefits (CCB).
Change Benefits	This web service loads workers' benefit elections and retirement savings plans.
Enroll in Retirement Savings Plans	This web service loads workers' retirement savings plan elections. It enrolls workers, updates existing elections, and carries forward prior elections unless they are explicitly changed.

Connections and Touchpoints

Touchpoint	Consideration
Absence	When you configure time off plans to track balances in Absence Management, you can retrieve the units for approved time off as part of earning and deduction calculations. Use absence component-related calculations (ACRCs) to associate absence plans to earnings and deductions. Ensure that you map all absence plans that can impact payroll or benefits earnings or deductions.
HCM Staffing and Compensation	Provide worker and job-related data for payroll and benefit processing, such as: • Worker status. • Personal information. Provide salary changes that can trigger benefit enrollment events.

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: DSN Reporting (FRA)

Setup Considerations: Pensions Auto-Enrolment (UK)

Steps: Set Up Benefits on page 1237

Steps: Set Up Flexible Payment and Deduction Options

Steps: Set Up Voluntary Deductions

Create Enrollment Event Rules on page 1349

Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Map Pay Components to Benefit Plans

Reference: Benefit Deduction Begin Date Rules on page 1367

Reference: Benefit Deduction End Date Rules on page 1369

Example: Create Advanced Lookup Tables for Benefit Rates (FRA)

Example: Control Visibility of Earning and Deduction Results

Steps: Set Up Employee Benefit Plans

Prerequisites

- Set up benefits.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

You can configure benefit plans, including health care, insurance, and retirement plans. You can also configure the healthcare savings and spending accounts. Example: Flexible spending account plans.

Steps

1. Create Health Care Plans on page 1289.

   Associate medical, dental, and vision health care plans with:

   - Coverage types.
   - Eligibility rules.
   - Plan costs.
   - Earnings and deductions.
2. Create Insurance Plans on page 1295.
3. (Optional) Create critical illness insurance plans.

   Select a benefits plan type that supports the enrollment data that you need to provide to your benefits provider.

   See Setup Considerations: Critical Illness Insurance Plans on page 1298.
4. Create Retirement Savings Plans on page 1302.

   Define the retirement plan minimum and maximum contribution amounts or percentages for:

   - Employees.
   - Employers.
   - Payroll deductions.
5. Create Rules for Allocating Retirement Savings Contributions on page 1304.
6. (Optional) Create Spending Account Plans on page 1310.

   Define contribution limits and other details for benefits spending account plans.

7. (Optional) Access the Maintain Health Care Coverage Targets task.

   (Optional) In Edit Tenant Setup - HCM, in the Benefits section:

   - Select the Include an additional HSA Coverage Target Option check box if your Health Care Savings (HSA) plan offers more coverage levels than Employee and Family.
   - Select either *Employee* or *Family* for IRS Limit for additional HSA Coverage Target Option.

   Set up HSA coverage targets. See Create Health Care Coverage Targets on page 1246.

   Associate health care coverage targets with either the HSA *Employee* or the *Family* coverage targets.
8. (Optional) Create Health Savings Account Plans on page 1306.

   Define contribution limits and other details for health savings account plans.
9. (Optional) Create Additional Benefit Plans on page 1313.

   Create benefit plans for other types of plans. Example: ESPP, commuter, pet insurance, or gym membership.
10. (Optional) Access the tasks Maintain FEGLI Codes and Maintain FEGLI Plan Mapping (U.S. Federal).

    Create mappings for FEGLI insurance codes and SF 50 equivalents. Example: 0000 - B0. Also, map the FEGLI plan types (Basic, Options A, B, and C) to insurance plans.

Related Information

Concepts

Steps: Set Up Benefits on page 1237

2022R1 What's New Post: Hide Benefit Plans

Create Health Care Plans

Prerequisites

- Set up benefits.
- Create benefit coverage types for health care.
- Create health care rates. Define rates by:
  - Age.
  - Demographic factors.
  - Length of service.
  - Percentage of salary.
  - Percentage of salary plus a flat amount.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

You can create a plan for each health care provider. You can have multiple plans, including high-deductible plans. For US employees, you can also configure options for US Medicare and US Affordable Care Act Form 1095-C.

Steps

1. Access the Create Benefit Plan task.
2. From the Benefit Plan Type prompt, select *Health Care Coverage Plan*.

3. Select a Health Care Rate Type to determine how you map benefit groups with health care rates or plan costs.

   Select:

   - *Flat Rate* to configure plan costs for each benefit group.
   - *Calculated Rate* to select a predetermined health care rate. You can create a derived health care rate based on additional criteria that add credits or surcharges for the benefit plan from the Create Health Care Rate task.
4. As you complete the task, consider:

Option	Description
Do Not Use	When selected, Workday appends the Do Not Use label to the benefit plan name and hides it from Benefit Plan configuration prompts, as of the effective date. This check box doesn't hide the benefit plan name from configuration prompts in these tasks and business process: • Create or Edit External Payroll Deduction tasks. • Create or Edit External Payroll Earning tasks. • *Review COBRA Eligibility Event* business process.
External Plan Description	Create an external URL that Workday displays on the enrollment form.
Worker Plan Eligibility	Select an eligibility rule to limit plan coverage to a subset of workers in the participating benefit group. Example: Limit coverage in the *Hourly Employees* benefit group to the workers in the state of California. Select an eligibility rule that includes only California workers.
Dependent Plan Eligibility	Select an eligibility rule to limit coverage to a class or category of dependents. Example: Limit coverage to dependents under the age of 27.
Overage Dependent Eligibility	Select the eligibility rule to use in association with the Fair Market Value per Dependent field. This rule enables you to determine who should have imputed income calculated by Workday Payroll or Payroll Interface.
Auto Enroll	Select to enroll employees in a benefit plan automatically. Note: When you select this option, access the Maintain Benefit Coverage Types task. Select the Only One Election check box for the coverage type that the health care plan belongs to. During enrollment, Workday automatically selects *Elect* for the plan and the employee can't make changes.

Option	Description
High Deductible Health Plan	Select to enable Health Savings Account elections.
Use Individual Rates	Available when if the Health Care Rate Type is *Flat Rate*. Select to override the employee and employer costs specified on the Manage Individual Rates task.
Reset Individual Rates on Plan Year Begin	Select to update employee and employer costs when the new plan year begins. Workday uses the values defined in the benefit plan. If you don't select this check box, the costs stay the same as the preceding year. Displays during enrollment when you select both: • A Health Care Rate Type of *Flat Rate*. • The Use Individual Rates check box.
Currency	Specifies the currency used to calculate the contribution amount for the benefit plan. Select the same currency used by the benefit groups that can enroll in the plan. Consider creating a separate benefit plan for each currency or country. You can only update this field if the Usage Count is zero.
Frequency	Available when the Health Care Rate Type is *Flat Rate*. Workday uses this frequency in payroll calculations, which might differ from the rate frequency displayed to employees during benefit enrollment.
Derive Coverage Targets	Select to have Workday automatically populate the Coverage targets that display when you view or modify your benefit plans. When you enroll workers in health care plans, Workday selects the Coverage target automatically based on current employee information.
Earnings and Deductions	For Workday Payroll, select: • *Earning* for benefit credits. Employer costs that are taxable to the employee. Required for imputed income. • *Deduction* for pretax and posttax employee costs. The employer costs and benefit surcharges that aren't taxable to the employee. Workday also

Option	Description
	uses these deductions for calculated health care rates. You need to specify deductions to ensure that the plans display costs. Note: When using the Payroll Interface for Workday, perform additional setup steps to map earnings and deductions to flexible health care rates. Contact your Integration Consultant for guidance on these setup steps.
Related Articles	Select existing articles related to the health care plan to build a knowledge base. You can link the last published version of an article that you create and publish with the Create Article task to a benefit plan. Note: Workers don't see a link in the benefit plan details. See Steps: Set Up Knowledge Management on page 3043.

5. (Optional) Configure options for the US Affordable Care Act Form 1095-C in the US Affordable Care Act Options section when you select a *Medical* health care type.
6. (Optional) Configure the US Medicare Options section to identify which benefit plans coordinate with Medicare.
7. Add plan details for your employees so that they can see the specific features of the benefit plan.

   As you complete the Expanded Plan Details section, consider:

Option	Description
Expanded Plan Details	Select the dental, medical, or vision plan benefit detail. Example: *Copay*, *Coverages*, or *Office Visits*.
Coverage Details	Select the coverage type, level, or benefit detail to display. Example: If you selected Chiropractor for the Expanded Plan Details, you might select In Network as the coverage detail.
Coverage Detail Type	Select the type of coverage. Available options depend on the value in the Coverage Details field and include: • Currency Amount • Percentage • Yes/No • Number • Months • Years
Coverage Detail Value	Enter or select the value for the benefit detail. Example: You select *Chiropractor* in Expanded Details, *Out of Network* for Coverage Details, and *Yes/No* for Coverage Details Type. You can select or clear the check box to

Option	Description
	indicate whether employees have Chiropractic coverage.
Value Override	Enter text that replaces the value for Coverage Detail Value, such as an email address, phone number, or considerations for the employee.

8. Configure the Benefit Rates and Eligibility grid to map benefit groups to health care rates or plan costs.

   As you complete the step consider.

Fair Market Value per Dependent	Flat Rate: Workday Payroll or Payroll Interface uses this value and Over Age Dependent Eligibility to calculate the imputed income.
External Payroll Cost Splits	Flat Rate: If you use an external payroll system to calculate flat rate costs, select: • The payroll entity. • The corresponding benefit deduction. • The cost amount.

Result

Workday creates a health care plan that you can add to an enrollment event.

Next Steps

- Create or edit the benefit plan year definition and add this plan to it.
- After creating health care plans, associate them with:
    - Coverage types such as dental, medical, or vision.
    - Eligibility rules.
    - Plan costs.

Related Information

Concepts

Steps: Set Up Fair Market Value for Health Care Plans on page 1502

Steps: Manage Individual Benefit Rates on page 1268

Manage External Payroll Deductions

Create Health Savings Account Plans on page 1306

Reference: Field Types for Health Care Expanded Plan Details on page 1324

2022R1: What's New Post: Benefit Election Decision Support

Example: Add Expanded Details for Medical Plans on page 1320

Example: Create Advanced Lookup Tables for Benefit Rates (FRA)

Tasks

Steps: Create Standard Forms for Benefits

Steps: Create Deductions

Map Pay Components to Benefit Plans

Set Up Benefits Knowledge Base Articles on page 1316

Set Up Decision Support for Medical Plans

Prerequisites

Configure demographics for peer groups:

- Access the Maintain Genders task to configure genders for the gender peer groups.
- Access the Maintain Related Person Relationships task to configure relationships for the coverage peer group.
- Select the Medical check box on the Maintain Benefits Coverage Types task for each benefit plan to include in the peer group data.

Security: *Set Up: Benefits* domain in the Benefits functional area.

Context

You can configure peer groups for your U.S. workers so that they can see what medical plans their peers selected in the previous open enrollment event. A peer group consists of workers that have similar demographics, like gender, income, or age. Workday identifies a medical plan as one whose benefit coverage type has the Medical check box selected.

You can schedule a job that generates the peer group data that workers see during open enrollment. During enrollment, Workday displays percentage of peers that selected each plan in the My Peers Chose column of the medical plan grid.

Steps

1. Access the Maintain Decision Support Peer Groups for Benefits task.
2. To include a demographic category, select any of these check boxes and select 1 or more of the options:
   - Gender
   - Age Ranges
   - Total Base Pay Ranges
   - Coverage
3. Access the Generate Peer Group Data for Benefits task and schedule it for now or in the future.

Result

During open enrollment, workers see statistics in the My Peers Chose column of the medical plan selection grid. They can use the information to guide their selection of a plan, based on what their peers selected in the previous open enrollment event.

Note:

Workers won't see the My Peers Chose column if they are in a peer group of fewer than 10 workers. Workday displays *New or Updated Plan* for new medical plans. If you map a new plan to an existing plan, Workday displays the election percentage of the existing plan.

Example

Gina is a benefits partner that has 2,000 employees that are eligible for open enrollment, with 3 medical plans. Gina accesses the Maintain Decision Support Peer Groups for Benefits task and makes these selections:

- Gender: Male, Female, Not Declared
- Age Ranges: Under 25, 35-44, 45-54, 55-65
- Coverage: Child, Domestic Partner, Spouse

Gina then runs the Generate Peer Group Data for Benefits job to generate the data. To see the results, Gina runs the View Peer Group Data for Benefits report, which displays 30 peer groups, 1 for each combination of demographic categories.

This table displays 3 examples of the peer groups:

Gender	Age Ranges	Coverage	Medical Plan	Enrolled
Female	25 - 34	Worker	Plan A	105
			Plan B	146
			Plan C	49
Male	35 - 44	Worker, Domestic Partner, Spouse, Child	Plan A	150
			Plan B	240
			Plan C	110
Not Declared	45 - 54	Worker, Domestic Partner	Plan A	45
			Plan B	15
			Plan C	15

During open enrollment, workers see the percentages for their peer group.

Next Steps

Use the report, View Peer Group Data for Benefits, to gain insight into the type of medical plans workers selected in the previous open enrollment event.

Related Information

Concepts

24R1 What's New Post: Decision Support for Medical Plan Election

Tasks

Steps: Set Up Open Enrollment on page 1414

Create Insurance Plans

Prerequisites

- Set up benefits.
- Set up insurance costs.
- Configure insurance coverage definitions.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

Define the insurance plans for your employees.

Steps

1. Access the Create Benefit Plan task.
2. In the Benefit Plan Type field, select *Insurance Coverage Plan*.

3. As you complete the task, consider:

Option	Description
Do Not Use	When selected, Workday appends the Do Not Use label to the benefit plan name and hides it from Benefit Plan configuration prompts, as of the effective date. This check box doesn't hide the benefit plan name from configuration prompts in these tasks and business process: • Create or Edit External Payroll Deduction tasks. • Create or Edit External Payroll Earning tasks. • *Review COBRA Eligibility Event* business process.
External Plan Description	Provide a link to an external document about the benefit plan; Workday displays this link on the enrollment form.
Worker Plan Eligibility	If not all workers in the participating benefit groups are eligible for this plan, then select an eligibility rule to limit coverage to a subset. Example: You want to limit coverage within the *Hourly Employees* benefit group to workers in the state of California. To do so, select an eligibility rule that includes only California workers.
Dependent Plan Eligibility	Select an eligibility rule to limit coverage to a class or category of dependents. Example: Limit coverage to dependents under the age of 27. Only dependents who meet the criteria for an eligibility rule become available for selection during enrollment. If you don't select a dependent plan eligibility rule, coverage is available to all dependents.
Employee Cost is Pre-Tax	If you clear this check box, Workday takes employee costs from after-tax earnings.
Employer Cost is Non-Taxable	If you clear this check box, Workday considers employer costs taxable to the employee.
Auto Enroll	Select to enroll employees in an insurance plan automatically. Then select the Only One Election option for the coverage type to which the insurance plan belongs. Note: Don't select Auto Enroll for insurance plans that require evidence of insurability (EOI).

Option	Description
	On the enrollment pages, Workday automatically selects *Elect* for this election, which employees can't change.
Enable Evidence of Insurability Link	Select to display the Evidence of Insurability Link prompt and to display the link during an enrollment event.
Evidence of Insurability Link	Select or create an external URL that links workers to evidence of insurability information. Example: Link to the provider website or information on your organization website.
Covers	Identify the target populations that are valid for the insurance plan.
Insurance Coverage	Select an insurance coverage definition to specify the coverage levels or amounts that employees enrolling in the plan can select.
Use Individual Rates	Select this check box to override the employee and employer costs defined with the Manage Individual Rates task.
Reset Individual Rates on Plan Year Begin	Select to update employee and employer costs when the new plan year begins. Workday uses the values defined in the benefit plan. If you don't select this check box, the costs stay the same as the preceding year.
Earnings and Deductions	For Workday Payroll, select: • *Earnings* for benefit credits. Calculates employer costs that are taxable to the employee (required for imputed income). • *Deductions* for pretax and post-tax employee costs. Calculates employer costs and benefit surcharges that aren't taxable to the employee. Workday also uses these deductions for calculated health care rates. If you don't specify deductions, the plans might not display costs. Note: When using the Payroll Interface for Workday, perform additional setup steps to map earnings and deductions to flexible health care rates. Contact your Integration Consultant for more guidance on these setup steps.

4. In the Expanded Plan Details section, add plan details for your employees so that they can see the specific features of the benefit plan. You can also add instructions and links to benefit plan information. Workday displays coverage options with costs.
5. In the Benefits Eligibility and Rates tab, define the plan costs and benefit credits for each benefit group that qualifies for the insurance plan.

6. (Optional) In the External Payroll Deductions tab, select the payroll deduction code.

   If you’re using an external payroll system to calculate insurance costs, select benefit deduction for the payroll entity.
7. (Optional) In the Age Adjustment Policy tab:
   a) Select whether to calculate the employee cost based on the age-adjusted or full coverage amount. Make the same selection for the employer contribution.
   b) Select Use Employee's Age for Age Adjustment to base the spouse age-adjusted coverage amount on the employee age.
   c) Define rules for adjusting insurance coverage amounts based on an employee age:
      - Enter the Age From, the Age To, and the Multiply by Percentage fields.
      - Select the Calculate As Of date and, if necessary, enter the specific month (expressed as a number) and day. You can select Of Prior Plan Year check box to use specific dates from the prior plan year.
      - Select Last Date of Previous Pay Period to enable the new coverage amount based on an employee's age to become effective the pay period following the one in which their birthday occurs.

   Example: Adjust coverage amount to 95% of full coverage for employees 70 to 75 years of age.

Next Steps

- Create or edit the benefit plan year definition and add this plan.
- (Optional) Create cross-plan insurance prerequisites.
- (Optional) Create cross-plan coverage amount or percentage maximums.

Related Information
Concepts
Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Setup Considerations: Critical Illness Insurance Plans

You can use this topic to help make decisions when planning your configuration and use of critical illness plans. 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 doesn't provide a benefit plan type for critical illness coverage, so you can select from these plan types:

- Insurance
- Additional Benefits
- Health Care

Each plan type enables you to manage enrollments in critical illness plans, but each has important administrative challenges to consider. You select a plan type for your critical illness plans, depending on:

- The critical illness plan design.
- The rate structure.

You also select a plan type depending on what you want to do with the critical illness information:

- Report internally within the company.
- Send the plans to the benefit provider through a benefit connector or a custom integration.
- Send plan information to the benefit provider manually. Example: Uploading the information through a website.

Before you set up a critical illness plan in Workday Benefits, you must consider how you'll send plan information to your benefits provider. The choices you make while configuring benefit plans determine the information available to send to your provider.

You can create plans that capture the coverage amount for each coverage target, based on whether you use:

- Individual coverage rates.
- Multiple coverage targets.
- Tiered rate bands.

Business Benefits

Selecting the correct plan type before setting up critical illness plans helps:

- Avoid creating a plan that doesn't address your needs and in the wrong format for the benefits provider.
- Deliver the right information to benefit providers through custom or Cloud Connect for Benefits integrations.

Use Cases

- You use individual rates for employees.
- You have multiple rate bands.
- You use age bands.
- You have a vendor not covered by a CCB and use custom integration.

Questions to Consider

Question	Considerations
What critical illness plan information do you need to give to your benefit provider?	Most benefit providers require specific data elements and reporting formats to establish enrollment participation and coverage amounts. They might: • Expect multiple records with different plan codes for each coverage target. • Collect the data on a single record with multiple columns.
What plan type best captures the information that your vendor requires?	Typically, we recommend the Insurance plan type. Each plan type provides different configuration options. Contact your Integrations Consultant to determine what data and format that they need.
How many rate bands should you have?	Consider which employee and dependent demographic data determines these rates bands. Examples: Age, dependents, or beneficiaries.

Recommendations

Plan Type	Recommended For	Considerations
Insurance	• Workday Cloud Connect for Benefits integrations. • Multiple coverage targets. • Individual rate bands.	Recommended for most employers because you can define specific coverage targets and coverage amounts. You can also provide demographic data for dependents. This plan type: • Recommended for Cloud Connect for Benefits integrations. • Needs a plan for each coverage target.
Additional Benefits	Individual rate plans.	You can create critical illness plans with different coverage targets and amounts, without creating separate plans for each coverage target. You can't easily add age bands, and you can't provide the demographic information required for dependents.
Health Care	• Single composite rate for premiums and billing. • Individual rate bands.	Recommended only if the benefit provider or integration vendor asks for tiered coverage, which Insurance plans can provide. Supports age bands. Health Care plans don't capture coverage amounts, making it difficult for downstream applications and integrations to display and report coverage.

Requirements

- Complete the prerequisites required for benefits plans.
- Request the file specification from your benefit provider so that you can familiarize yourself with their data requirements. The plan setup might need to accommodate:
  - Coverage start dates.
  - Coverage amounts for the employee, spouse, or dependents.
  - Demographic information for spouse or dependents. Example: Name, date of birth, and social security number as identifiers.
- Cloud Connect for Benefits integrations: Compare the data requirements for your benefit provider with the output options provided by the integration.
- Create a custom integration if you select a plan type other than Insurance.
- Set up integrations with third-party vendors.

Limitations

No impact.

Tenant

No impact.

Security

Domains	Considerations
Set Up: Benefits domain in the Benefits functional area.	Users secured to this domain can create benefit plans.
Manage: Benefits for Organizations domain in the Benefits functional area.	Users secured to this domain can manage individual benefit rates.

Business Processes

No impact.

Reporting

No impact.

Integrations

Workday Cloud Connect for Benefits integrations require an Insurance plan type for critical illness plans. If you don't use Workday-provided integrations, you need to create a custom integration.

Note: When using Cloud Connect for Benefits for critical illness plans, contact your Integration Consultant to ensure that the integration can process the critical illness plan information correctly.

The Cloud Connect for Benefits or custom integrations typically require:

- Subscriber data.
- Enrollment data.
- Compensation data.
- Coverage information.
- Beneficiary information.
- Dependent information.

Connections and Touchpoints

Critical illness plans interact with these parts of Workday:

- Enrollment information.
- Cloud Connect for Benefits.
- Deduction payments.
- Insurance plans.
- Health care plans.
- Additional benefit plans.

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.

Related Information

Concepts

Setup Considerations: Integrations

Concept: Cloud Connect for Benefits

Concept: Cloud Connect for Benefits Integration Templates

Create Insurance Plans on page 1295

Steps: Set Up Benefit Provider Integration
Steps: Manage Individual Benefit Rates on page 1268
Workday Community: CCB Products: Critical Illness

Create Retirement Savings Plans

Prerequisites

- Set up benefits.
- Create one or more deductions or earnings.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

When you create retirement savings accounts for employees, you can define the:

- Retirement plan minimum and maximum contribution amounts for employees.
- Employer contribution amounts.
- Payroll deductions.

You can allocate retirement savings contributions across multiple plans by creating a separate deduction for each plan.

Steps

1. Access the Create Benefit Plan task.
2. Select *Retirement Savings Plan* from the Benefit Plan Type prompt.
3. As you complete this task, consider:

Option	Description
Do Not Use	When selected, Workday appends the Do Not Use label to the benefit plan name and hides it from Benefit Plan configuration prompts, as of the effective date. This check box doesn't hide the benefit plan name from configuration prompts in these tasks and business process: • Create or Edit External Payroll Deduction tasks. • Create or Edit External Payroll Earning tasks. • *Review COBRA Eligibility Event* business process.
External Plan Description	Create a plan description document and make it available on the enrollment form as an external link.
Worker Plan Eligibility	Select an eligibility rule to limit coverage to a subset of eligible workers in the participating benefit groups.
Currency	Specifies the currency used to calculate the contribution amount for the benefit plan. Select the same currency used by the benefit groups that can enroll in the plan. Consider creating a separate benefit plan for each currency or country.

Option	Description
	You can only update this field if the Usage Count is zero.
Frequency	Workday uses the frequency in payroll calculations.
Earnings and Deductions	Select the deductions Workday Payroll uses to calculate employee and employer contributions to retirement plans.

4. In the Expanded Plan Details section, add plan details for your employees so that they can see the specific features of the benefit plan. You can also add instructions and links to benefit plan information. Workday displays employee and employer contribution information.
5. In the Employee Contribution section,you can enable workers to automatically increase retirement savings contributions, to support Secure Act 2.0.

   This feature is only available for *percentage* contributions. Employees can opt in or out of automatic contribution increases during an enrollment event with the Auto Contribution Increase check box.

   As you complete this section, consider:

Option	Description
Auto Contribution Increase	Select to enable auto contribution increases on the retirement savings plan.
Auto Contribution Percentage	Specify the default contribution percentage of the worker's initial enrollment, between 3% and 10%. Available only when you enable Auto Contribution Increase.
Yearly Auto Contribution Increase Percentage	Specify how much the percentage increases each year. Typically 1%. Available only when you enable Auto Contribution Increase.
Auto Increase Percentage Maximum	Specify the maximum percentage at which the yearly increase stops. Available only when you enable Auto Contribution Increase.

6. (Optional) Select a deduction for the Payroll Entity on the External Payroll Deductions grid when you use an external payroll application to calculate employee and employer contributions.

   Specify deductions to ensure that retirement savings plans display costs.

Result

You can enable employees to configure their contribution elections for retirement savings plans during open enrollment. Workday enables employees to configure their contribution elections during open enrollment or update them during the plan year on the Benefits and Pay Hub.

Next Steps

- Enable employees to allocate their contribution to more than 1 retirement savings plan using the Maintain Retirement Savings Allocation Across Multiple Providers task.
- Create or edit the benefit plan year definition and add the new retirement savings plan to it.

Related Information

Concepts

Manage External Payroll Deductions

Steps: Create Deductions

Steps: Create Earnings

Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Create Rules for Allocating Retirement Savings Contributions

Prerequisites

- Create retirement savings plans.
- Security: *Set Up Benefits: Retirement Savings Allocation Across Multiple Providers* domain in the Benefits functional area.

Context

Create the coverage types that enable employees to allocate their retirement savings contribution to more than 1 retirement plan within a coverage type.

Note: If you use allocation of retirement savings plans, you can't use benefit defaults or cross plan prerequisites.

To	Complete the Employee Contribution Allocation Section	Complete the Employer Contribution Allocation Section	Set the Employer Allocation Rules
Allocate both employee and employer contributions.	Yes	Yes	Employee can always allocate.
Allocate only employee contributions. Can’t allocate employer contributions.	Yes	No	
Allocate only employer contributions. Can’t allocate employee contributions.	No	Yes	Don’t select.
Allocate both employee and employer contributions. Workday allows allocation of employer contribution only if the employee doesn't contribute to any plans.	No	Yes	Employee can allocate only if they don’t contribute to any plan.

Steps

1. Access the Maintain Retirement Savings Allocation Across Multiple Providers task.
2. As you complete both the employee and employer Employee/Employer Contribution Allocation Across Multiple Providers sections, consider:

Option	Description
Retirement Savings Coverage Type	Select the coverage types to which employees can allocate contributions.
Employer Contribution Allocation Rules	Select either:

Option	Description
	• *Employee can always allocate* if you want the Employer Allocation on the enrollment form available for entry. • *Employee can allocate only if they do not contribute to any plans*. If you want the Employer Allocation on the enrollment form available for entry only when the employee hasn't selected to contribute to any plans within that coverage type.
Priority	Enter a number that Workday uses to determine which retirement plans receive the default Employer Contribution Percent. Workday applies only the highest priority to plans for which the worker is eligible. If the worker is eligible for multiple plans with different priority defaults, Workday applies only the default with the highest priority. The lower priority plan doesn't receive a default Employer Contribution Percent.
Allocation	Enter the percentage amount that you want as a default in the Employer Contribution Allocation field on the enrollment form. The total employer contribution allocation for all benefit plans must total 100%. On the enrollment form, the Employer Contribution Allocation automatically populates with this value.

Result

On the Retirement Savings Enrollment form for the benefit coverage types you added, you see a separate page for each coverage type.

Next Steps

- Start an open enrollment.
- Initiate a change in retirement savings task.
- Initiate a passive event process.

Enroll Employees in Retirement Savings Plans

Prerequisites

- Create rules for allocating retirement savings plan contributions.
- Initiate an open enrollment, change benefit election, or passive event for an employee.
- Security: *Worker Data: Benefits* in the Benefits domain.

Context

You can enroll an employee in a retirement savings plan. If you configured multiple retirement savings plans, you can allocate the employee's percentage across the multiple plans. You can also troubleshoot issues the employee has in allocating the correct amounts or percentages.

Administrators can use the *Enroll in Retirement Savings Plans* web service to bulk load multiple enrollment events.

Because administrators use the *Enroll in Retirement Savings Plans* web service for loading data the web service completes processing automatically, even if you specify manual processing.

Steps

1. Access the task in My Tasks for enrolling in benefits.
2. As you complete these steps, consider:

Option	Description
Employee Contribution	(Optional) Enter a contribution percent or amount. The amount must be within the minimum and maximum contribution defined on the plan.
Plan Contribution Percentage	The contribution percentage for either the employee or employer for each plan. To allocate contributions to more than 1 plan, enter a percentage allocation for each plan. The total allocation for each grid must equal 100%.
Employer Contribution	Displays when you configure the employer contribution for the plan or if the employee can contribute.

Next Steps

Use these reports to view details of employee benefit plans:

- Benefit Elections report.
- Benefit Election History report.
- Employee Benefit Elections - Current vs. Previous report.

Create Health Savings Account Plans

Prerequisites

- Set up benefits.
- Set up payroll deductions.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

Define contribution limits and other details for health savings account plans.

A Health Savings Account (HSA) combines a lower-cost, high-deductible health insurance plan (HDHP) with a tax-favored savings account. The HSA enables employees to deposit money to pay for qualified health care expenses until they meet the medical plan deductible. Unlike a health care flexible spending account, the unspent savings in an HSA can roll over year after year and earn interest.

The U.S. Federal government sets the maximum contribution amount for HSA plans each year. Workers age 55 and over have an additional catch-up amount. Workday recommends that you create 1 plan for workers under 55 and another for workers 55 and over. With this approach, employees 55 and older can enroll in an HSA plan with a limit that includes both the HSA catch up and the regular HSA limits. This approach prevents employees 55 years or older from having to enroll in 2 plans to get the full benefit.

Steps

1. Access the Create Benefit Plan task.
2. As you complete this task, consider:

Option	Description
Do Not Use	When selected, Workday appends the Do Not Use label to the benefit plan name and hides it from Benefit Plan configuration prompts, as of the effective date. This check box doesn't hide the benefit plan name from configuration prompts in these tasks and business process: • Create or Edit External Payroll Deduction tasks. • Create or Edit External Payroll Earning tasks. • *Review COBRA Eligibility Event* business process.
Health Savings Account Coverage Type	Identify the health savings account type. Example: *HSA*.
External Plan Description	Select the URL address. When employees enroll in this plan, a link displays that opens the website in a new browser page.
Participating Benefit Groups	Associate the plan to specific benefit groups.
Worker Plan Eligibility	Select an eligibility rule that limits coverage to a subset of the employees in the selected Participating Benefit Groups.
Currency	Specifies the currency used to calculate the contribution amount for the benefit plan. Select the same currency used by the benefit groups that can enroll in the plan. Consider creating a separate benefit plan for each currency or country. You can only update this field if the Usage Count is zero.
Frequency	Specifies the amount that the employee can contribute during the specified frequency. Example: If you specify a maximum of $9300 USD at an annual frequency, the worker can contribute up to this amount during the 12-month period.

Option	Description
	During a single enrollment event, deductions and earnings on spending accounts and HSA plans have to have the same frequency. Schedule frequency overrides in Payroll. You can only update this field if the Usage Count is zero.
Earnings and Deductions	Map the contribution amounts to payroll (typically done through Workday Payroll or the Payroll Interface): • For Workday Payroll, select earnings and deductions. • For Payroll Interface, select earnings and deductions. Note: When using the Workday Payroll Interface, map earnings and deductions to HSA contributions. Contact your Integration Consultant for more guidance on these setup steps. See: • ../../../payroll/earnings-deductions-and-other-calculations/xmb1553624017699.dita • ../../../payroll/earnings-deductions-and-other-calculations/create-earnings-and-deductions/dan1370797367682.dita • ../../../payroll/earnings-deductions-and-other-calculations/create-earnings-and-deductions/dan1370797354517.dita • ../../../payroll/earnings-deductions-and-other-calculations/create-earnings-and-deductions/dan1370797354117.dita
Do Not Calculate Remaining Pay Periods	Used during enrollment. • Select this check box to have the employee or administrator enter the number of remaining pay periods during midyear benefit events. If the benefit event type is Open Enrollment, Workday uses the Benefit Group frequency to calculate the remaining pay periods automatically. For other event types, Workday leaves the Remaining Periods field empty, requiring the employee to enter a value. During a single enrollment event, deductions and earnings on spending

Option	Description
	accounts and HSA plans have to have the same frequency. • Clear this check box for Payroll to use the period schedule when calculating the remaining pay periods. Note: Don't select this check box after initiating open enrollment.

3. In the Plan Costs section, consider:

Option	Description
Participating Benefit Groups	If contributions vary by benefit group, identify each group separately and assign the contribution amounts to the corresponding coverage targets. If all benefit groups have the same contributions, list all groups in the Participating Benefit Groups field and assign the corresponding coverage targets and contribution amounts.
HSA Coverage Target	Workday automatically enters *Employee* and *Family*. If you've selected the check box to Include an additional HSA Coverage Target Options on the Edit Tenant Setup - HCM task, Workday automatically assigns the *Other* coverage target.
Maximum Contribution	Enter the maximum contribution amount for the savings plan. This amount includes both the employee and employer contributions. Workers can enter an amount up to 1 USD over the maximum. With this method, Workday allows for rounding that might prevent workers from reaching the maximum annual goal amount. Note: To prevent overcontributing, set a limit on the Payroll side to stop deductions at the maximum contribution level. Example: A worker with biweekly pay frequency elects the maximum amount of 7000 USD. The worker contributes 269.23 USD each pay period (7000/26 = 269.23067). The worker only contributes a total of 6999.92 USD (269 * 26 = 6999.98), 0.02 USD short of the maximum. However, if the worker elects 7001 USD, the worker can reach the 7000 USD limit.
Minimum Contribution	Enter the minimum amount that an employee must contribute to the savings plan.

Option	Description
	This amount doesn't include employer contributions.
Employer Contribution	Enter the amount that the employer contributes to the savings plan.

4. In the Expanded Plan Details section, add plan details for your employees so that they can see the specific features of the benefit plan.

   You can also add instructions and links to benefit plan information. Workday displays employee and employer contribution information.

Next Steps

- Create or edit the benefit plan year definition and add this plan.
- Access the Create Cross Plan Enrollment Prerequisites task to link the HSA plan to the prerequisite HDHP.

  IRS rules require that employees enroll in an HDHP before enrolling in an HSA plan.

  Note: You must link an HDHP plan as a prerequisite to an HSA plan. Workday requires the link to determine the correct HSA contribution limit. The link also enables employees to access the HSA enrollment page.

Related Information
Concepts
Create Health Care Plans on page 1289
Concept: Hiding Benefit Plans from Configuration Prompts on page 1318
Reference: Health Savings and Spending Accounts Enrollment Options on page 1321
The Next Level: Troubleshooting Benefits

Create Spending Account Plans

Prerequisites

- Set up benefits.
- Create payroll deductions.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

Define contribution limits and other details for benefits spending account plans.

Steps

1. Access the Create Benefit Plan task.
2. Select *Spending Account* for the Benefit Plan Type prompt.
3. As you complete the task, consider:

Option	Description
Do Not Use	When selected, Workday appends the Do Not Use label to the benefit plan name and hides it from Benefit Plan configuration prompts, as of the effective date. This check box doesn't hide the benefit plan name from configuration prompts in these tasks and business process:

Option	Description
	• Create or Edit External Payroll Deduction tasks. • Create or Edit External Payroll Earning tasks. • *Review COBRA Eligibility Event* business process.
Spending Account Type	Identify the spending account type. Example: *Healthcare FSA*, *Dependent Care FSA*, or *Transportation*.
External Plan Description	Select the URL address. When employees enroll in this spending account plan, a link displays that opens the website in a new browser page.
Participating Benefit Groups	Associate the plan to specific benefit groups.
Worker Plan Eligibility	Enter an eligibility rule that limits coverage to a subset of the employees in the selected Participating Benefit Groups.
Currency	Specifies the currency used to calculate the contribution amount for the benefit plan. Select the same currency used by the benefit groups that can enroll in the plan. Consider creating a separate benefit plan for each currency or country. You can only update this field if the Usage Count is zero.
Frequency	Specifies the maximum amount that the employee can contribute during the specified frequency. Example: If you specify a maximum of $9300 USD at an annual frequency, the worker can contribute up to this amount during the 12-month period. During a single enrollment event, deductions and earnings on spending accounts and HSA plans have to have the same frequency. After defining the frequency, you can only change it when the plan has no elections associated with it.

Earnings and Deductions	Map the contribution amounts to payroll (typically done through Workday Payroll or the Payroll Interface):
	
	• For Workday Payroll, select:
	    • The pretax deduction for employee contributions. (Workday Payroll doesn't process posttax deductions for spending accounts.)
	    • Earnings and deductions.

Option	Description
	• For Payroll Interface, select earnings and deductions. Note: When using the Workday Payroll Interface, map earnings and deductions to spending account contributions. Contact your Integration Consultant for more guidance on these setup steps. See: • ../../../payroll/earnings-deductions-and-other-calculations/xmb1553624017699.dita • ../../../payroll/earnings-deductions-and-other-calculations/create-earnings-and-deductions/dan1370797367682.dita • ../../../payroll/earnings-deductions-and-other-calculations/create-earnings-and-deductions/dan1370797354517.dita • ../../../payroll/earnings-deductions-and-other-calculations/create-earnings-and-deductions/dan1370797354117.dita
Do Not Calculate Remaining Pay Periods	For enrollment: • Select this check box to have the employee or administrator enter the number of remaining pay periods during midyear benefit events. If the benefit event type is Open Enrollment, Workday uses the Benefit Group frequency to calculate the remaining pay periods automatically. For other event types, Workday leaves the Remaining Periods field empty, requiring the employee to enter a value. During a single enrollment event, deductions and earnings on spending accounts and HSA plans have to have the same frequency. • Clear this check box for Payroll to use the period schedule when calculating the remaining pay periods. Note: Don't select this check box after initiating open enrollment.

4. In the Expanded Plan Details section, add plan details for your employees so that they can see the specific features of the benefit plan. You can also add instructions and links to benefit plan information. Workday displays employee and employer contribution information.

5. On the Plan Costs tab, consider:

Option	Description
Maximum Contribution	Enter the maximum contribution amount for the spending account. This amount includes both the employee and employer contributions. Workers can enter an amount up to 1 USD over the maximum. With this method, Workday allows for rounding that might prevent workers from reaching the maximum annual goal amount. Note: To prevent over contributions, set a limit on the Payroll side to stop deductions at the maximum contribution level. Example: A worker with biweekly pay frequency elects the maximum amount of 7000 USD. The worker contributes 269.23 USD each pay period (7000/26 = 269.23067). The worker only contributes a total of 6999.92 USD (269 * 26 = 6999.98), 0.02 USD short of the maximum. However, if the worker elects 7001 USD, the worker can reach the 7000 USD limit.
Minimum Contribution	Enter the minimum amount that an employee must contribute to the spending account. This amount doesn't include the employer contribution.
Employer Contribution	Enter the amount that the employer contributes to the spending account.

Next Steps

Create or edit the benefit plan year definition and add this plan.

Related Information

Concepts

Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Reference: Health Savings and Spending Accounts Enrollment Options on page 1321

Create Additional Benefit Plans

Prerequisites

- Set up benefits, defining these items for additional benefits:
  - Additional benefit coverage types.
  - Coverage targets or contributions for additional benefit plans.
- Set up benefit credits.
- Set up benefit surcharges.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

You can create an additional benefit plan for a benefit that doesn’t fit in the other coverage categories.

Examples:

- Commuter plans.
- Employee Stock Purchase Plans (ESPP).
- Gym memberships.
- Legal assistance.
- Pet insurance.

You can also create a long-term care insurance additional benefit. With the individual rate feature, you can enter a rate at the employee level.

You can track enrollment and costs in these plans.

Steps

1. Access the Create or Edit Benefit Plan task.
2. From the Benefit Plan Type prompt, select *Additional Benefits Plan*.
3. As you complete this task, consider:

Option	Description
Do Not Use	When selected, Workday appends the Do Not Use label to the benefit plan name and hides it from Benefit Plan configuration prompts, as of the effective date. This check box doesn't hide the benefit plan name from configuration prompts in these tasks and business process: • Create or Edit External Payroll Deduction tasks. • Create or Edit External Payroll Earning tasks. • *Review COBRA Eligibility Event* business process.
External Plan Description	Create an external URL that Workday displays on the enrollment form.
Participating Benefit Groups	Select the benefits groups that are eligible for this plan. The groups you select here determine the groups that are available in the Benefit Rates and Eligibility section.
Worker Plan Eligibility	If all workers in the participating benefit groups aren’t eligible for this plan, select an eligibility rule to limit coverage to a subset of workers. Example: You want to limit coverage within the Hourly Employees benefit group to workers in the state of California. To do so, select an eligibility rule that includes only California workers.
Auto Enroll	Select to enroll employees in an additional benefit plan automatically. On the enrollment

Option	Description
	page, Workday automatically selects *Elect*, and employees can only view it. Note: To enroll employees in a benefit plan automatically, select this option and select the Only One Election option for the Maintain Benefit Coverage Types page.
Use Individual Rates	Select this check box to override the employee and employer costs using the Manage Individual Rates task. Not available for amount-based plans.
Reset Individual Rates on Plan Year Begin	Select this check box when a new plan year begins to revert the employee and employer costs to the values defined on the benefit plan. Otherwise, the costs stay as they were for the prior year.
Whole Number Percentages Only?	Select to ensure that employees use whole numbers on additional benefit plans that use percentages. When selected, Workday displays an error for Workday on the desktop when an employee attempts to enter something other than a whole number.

Earnings and Deductions	Applies to Workday Payroll users and integrations to third-party payroll providers.
	
	• Select:
	    • Earning codes used to calculate employer costs that are taxable to the employee.
	    • Deduction codes used to calculate employee pre/post-tax costs
	    • Codes used to calculate employer costs that aren't taxable to the employee.

Currency	Specifies the currency used to calculate the contribution amount for the benefit plan. Select the same currency used by the benefit groups that can enroll in the plan. Consider creating a separate benefit plan for each currency or country. You can only update this field if the Usage Count is zero.

4. In the Expanded Plan Details section, add plan details for your employees so that they can see the specific features of the benefit plan. You can also add instructions and links to benefit plan information. Workday displays contribution information and the amount workers pay.

5. In the Benefit Rates and Eligibility section, enter:

Option	Description
Covers	Displays only if you selected the Use Coverage Target check box on the Maintain Benefit Coverage Types page.
Employee Cost (Pre-tax)	Available if you selected a coverage type with *Rates* in the Plan Behavior field. Enter the pretax plan cost.
Employee Cost (Post-tax)	Available if you selected a coverage type with *Rates* in the Plan Behavior field. Enter the post-tax plan cost.
Employee Amount Minimum	Available if you selected a coverage type with *Accepts Amount* in the Plan Behavior field. Enter the minimum amount that an employee can contribute.
Employee Amount Maximum	Available if you selected a coverage type with *Accepts Amount* in the Plan Behavior field. Enter the maximum amount that an employee can contribute.
Employee Percent Minimum	Available if you selected a coverage type with *Accepts Percent* in the Plan Behavior field. Enter the minimum percentage that an employee can contribute.
Employee Percent Maximum	Available if you selected a coverage type with *Accepts Percent* in the Plan Behavior field. Enter the maximum percentage that an employee can contribute.
Employer Cost (Non-taxable)	Map nontaxable costs to a payroll deduction.
Employer Cost (Taxable)	Map taxable costs to a payroll earnings code.

Next Steps

Create or edit the benefit plan year definition and add this plan.

Set Up Benefits Knowledge Base Articles

Prerequisites

- Workday Help SKU.
- Security: In the *Help* functional area, the segmented security group for benefits administrator needs:
    - *Manage: Help Articles* (Modify)
    - *View: Help Articles*

Context

You can create a knowledge base of articles related to health care benefit plans. You can link the last published version of an article that you create and publish with the Create Article task to a benefit plan. This feature doesn't add article links to the worker's benefit plan.

Steps

1. Access the Maintain Article Categories task to create benefits article categories.
2. Set up security to give benefits administrators the ability to create knowledge base articles and add them to benefit plans. Create a segment-based security group to limit the categories benefits administrators have access to.
    a) Access the Create Security Group task and select *Segment-Based Security Group* as the type. Name the new security group.
    b) In the Security Groups field, select *Benefits Administrator*.
    c) In the Access to Segments group, select categories in the Knowledge Base Article Category prompt that you want administrators to be able to use for creating and managing articles.
    d) Give this security group modify and view permissions for the *Manage: Help Articles* domain.
3. Create articles and add them to benefit plans:
    a) Access the Create Article task to author and publish articles.
    b) Link an article to a benefit plan by accessing the Edit Benefit Plan task. Select an article title from the Related Article field.

Related Information

Concepts

Concept: Knowledge Management on page 3053

Tasks

Generate Help Article for Benefit Plan on page 1317
Steps: Set Up Knowledge Management on page 3043
Steps: Create Article Authors on page 3046
Create Articles on page 3047
Create Health Care Plans on page 1289

Generate Help Article for Benefit Plan

Prerequisites

- Workday Help SKU.
- Set Up Benefits Knowledge Base Articles.
- Security:
    - *Generate: Benefit Plan Help Articles* domain in the Benefits functional area.
    - *Manage: Help Articles* domain in the Help functional area and the People Experience functional area.

Context

You can use Generative AI (GenAI) to generate Help articles for your healthcare plans. When you run the task, Workday automatically generates a draft article and places it in the Help Workspace, after which you can review, edit, and publish it for workers to read and better understand their benefit options. You can then link the articles to the Related Articles field of the associated healthcare plan.

When generating your article, the GenAI incorporates these benefit plan details:

- Benefit Plan Full Name.
- Benefit Provider.

- Currency.
- Dependent Plan Eligibility.
- Description.
- Expanded Plan Details.
- Frequency.
- Overage Dependent Eligibility.
- Plan Costs.
- Plan Short Cut Name.
- Plan Type.
- Worker Plan Eligibility.

You can only generate articles for Health Care Coverage plan types. This feature only generates content in English - U.S.

Steps

1. Access the Generate Help Article for Benefit Plan task.

   Or, from the related actions menu of the healthcare benefit plan, select Benefit Plan > Generate Help Article.
2. Select the Benefit Plan you want to generate an article for.
3. Select a Plan Data as of Date.

   Workday uses the benefit plan configuration as of this date to generate the article's content.
4. Enter a unique title for your article.
5. Select OK.

   Workday displays the selected plan and any existing published articles linked to that plan.
6. Select Generate Help Article.

Result

Workday directs you to the generated article in the Help Workspace.

Next Steps

1. Review, edit, then publish your article.
2. (Optional) Access the Edit Benefit Plan task and manage Help article links in the Related Articles field.

Related Information

Concepts

Concept: Knowledge Management on page 3053

2025R2 Feature Release Note: Generate Help Articles for Healthcare Plans with AI

Tasks

Set Up Benefits Knowledge Base Articles on page 1316

Create Articles on page 3047

Concept: Hiding Benefit Plans from Configuration Prompts

You can hide benefit plan names from the Benefit Plan prompt in tasks and reports to avoid using obsolete benefits plans. Examples:

- Creating or editing benefit plan year definitions.
- Creating earnings and deductions.
- Defining cross-plan dependencies.

You can select the Do Not Use check box on the benefit plan to append a label of Do Not Use to the name. Workday hides these plan names from configuration prompts. This label makes it easier to view obsolete plans in benefit plans year definitions and in reports.

Note: By selecting this check box, you don't affect the active status of the benefit plan. To inactivate the benefit plan, remove it from the benefit plan year definition.

You can also use the Do Not Use field on the Benefit Plan web service to hide benefit plans.

After you select the check box, you can use the Benefit Plans report to view plans with the label Do Not Use. You can then remove obsolete plans from the current benefit year plan definitions.

You can continue to search for and select the plan name in search prompts. To view hidden plans, you can access the Edit Benefit Plan task. From the Benefit Plan prompt, select All Benefit Plans Marked Do Not Use.

Effective Dating

Workday uses the effective date of the plan to determine when to display the Do Not Use label in the benefit plan name. When you use a future date, Workday also appends the effective date in some prompts that don't use effective dating.

Example: On the Edit Earning task, Workday displays the Benefit Plan prompt on the Non-Effective Dated tab. Workday might display the benefit plan name as *GMS Dental Plan (Do Not Use as of 02/22/2022)*.

Affected Configuration Prompts

Workday hides benefit plan names with the Do Not Use label from these tasks:

- Create Benefit Credit (Insurance Cost Lookup Credit types only).
- Create Benefit Group, on the Benefit Plan Mappings tab.
- Create Benefit Plan Year Definition.
- Create Cross Plan Insurance Coverage Maximum.
- Create Cross Plan Insurance Percentage Maximum.
- Create Cross Plan Enrollment Prerequisite.
- Create Cross Plan Retirement Savings Contribution Maximum.
- Create Deduction.
- Create Earning.
- Edit Benefit Credit (Insurance Cost Lookup Credit types only).
- Edit Benefit Group, on the Benefit Plan Mappings tab.
- Edit Benefit Plan Year Definition.
- Edit Cross Plan Insurance Coverage Maximum.
- Edit Cross Plan Insurance Percentage Maximum.
- Edit Cross Plan Enrollment Prerequisite.
- Edit Cross Plan Retirement Savings Contribution Maximum.
- Edit Deduction.
- Edit Earning.
- Maintain Benefit Defaults.

Related Information
Concepts
Create Benefit Plan Year Definitions on page 1418
2022R1: What's New Post: Hide Benefit Plans

Concept: Employee Stock Purchase Plans

Employee Stock Purchase Programs (ESPP) provide employees the option to purchase company stock at a discounted price. Employers typically offer these plans once or twice a year, using either an open enrollment event or life event. You can configure an ESPP plan using either the Retirement Savings Plan or the Additional Benefits Plan types. You can set up matching contributions with your payroll provider.

Related Information
Concepts
Create Health Care Plans on page 1289

Example: Add Expanded Details for Medical Plans

This example illustrates how to set up the expanded plan details that employees can view when selecting their health care plans during an enrollment event.

Context

You want to display the details for an existing medical plan during open enrollment. You configure the expanded plan details for the PPO medical plan.

Prerequisites

- Create a medical plan called *Medical - MyMedical PPO* with a flat rate.
- Security: *Set Up: Benefits* in the Benefits functional area.

Steps

1. Access the Edit Benefit Plan task.
2. Select *Medical - MyMedical PPO* from the Benefit Plan prompt that you created in the prerequisite step.
3. Select today's date from the Effective Date prompt to specify when the expanded plan details become available in the plan for enrollment events.

   Click OK.
4. In the Expanded Plan Details section, enter this informational text: *This plan doesn't require a Health Savings Account (HSA).*
5. Enter these values in the grid. Use the Display Order column to define the order in which you want the details to display for the employee.

Display Order	*Expanded Plan Details*	*Coverage Details*	*Coverage Detail Type*	*Coverage Detail Value*	*Value Override*
1	Coverage	~Individual (Network)~	Percentage	85	
		~Individual (Non-Network)~	Percentage	40	
2	Deductible	~Individual (Benefits)~	Number	3,000	
		~Individual + DP/ Spouse or Child(ren)~	Number	7,500	
3	Out-of-Pocket Annual Maximum	~Individual (Benefits)~	Number	50,000	

Display Order	*Expanded Plan Details*	*Coverage Details*	*Coverage Detail Type*	*Coverage Detail Value*	*Value Override*
		~Individual + DP/ Spouse or Child(ren)~	Number	75,000	
5	Hospital	In Network	Percentage	85	
		Out of Network	Percentage	40	
4	X-rays/ Medical Labs	~Individual (Network)~	Percentage	85	85. Doesn't include non-network technicians.
		~Individual (Non-Network)~	Percentage	40	

6. Click OK and Done.

Related Information

Concepts

Create Health Care Plans on page 1289
Reference: Field Types for Health Care Expanded Plan Details on page 1324
2022R1: What's New Post: Benefit Election Decision Support

Reference: Health Savings and Spending Accounts Enrollment Options

If you need to approve or correct the plan entries, you can view these enrollment records:

- Health Savings Account (HSA).
- Spending account.

You can see additional fields in the enrollment record that the employee can't.

Note: Employees can change health savings and spending account contributions as long as Workday can take the payroll deduction during the same plan year.

This table displays the available fields and identifies the additional fields that you can use to view employee enrollments. Both HSA and spending account enrollments use the same fields.

Field Name	Visible	Who can see this?
Your estimated contributions made this year	Displays for midyear events that are not open enrollment events.	Admin and employee
Actual contributions from payroll	Displays when you use Workday Payroll.	Admin
Per Paycheck	Displays the contribution amount per paycheck. When you enter a value, Workday automatically updates the Annual field.	Admin and employee
Annual	Workday displays:	Admin and employee

Field Name	Visible	Who can see this?
	• Zero, when the employee is newly eligible or previously waived the plan. • The elections that the employee made in their last enrollment when this event is a midyear change. When you enter a value, Workday automatically updates the value in the Per Paycheck field. The value: • Must be equal to or greater than the contribution minimum defined on the benefit plan. • Must be equal to or less than the contribution maximum defined on the benefit plan. • If the change occurs at midyear, the value must be equal to or greater than the value in the Your estimated contributions made this year field. However, if the plan minimum is zero, you can enter zero, even if the employee made previous contributions in the year.	
Total Paychecks or Remaining Paychecks (for midyear event)	Displays when: • You maintain period schedules and clear the Do Not Calculate Remaining Pay Periods check box on the plan. The value is the number of periods left in the benefit plan year. • You select the Do Not Calculate Remaining Pay Periods check box and this event is for open enrollment. Workday automatically displays the frequency associated with the benefit group. • You select the Do Not Calculate Remaining Pay	Admin and employee

Field Name	Visible	Who can see this?
	Periods check box and this event isn't for open enrollment. The value is zero. • You don't maintain the period schedules and you clear the Do Not Calculate Remaining Pay Periods check box on the plan. The default value is zero.	
Use Paycheck Override	When selected, Workday applies the change across all HSA and spending accounts.	• Admin
Number of Paychecks	Displays if you select the Use Paycheck Override check box. Enter the number of deductions in case of a life event.	• Admin • Employee if you select the Do Not Calculate Remaining Pay Periods check box with a benefits life event.
Contribution	Displays when the frequency of the benefit group is different to than the frequency associated with the employee's pay group.	Admin and employee
Total Annual Contribution	Displays all contributions, including employer contributions, if any.	Admin and employee

Your employee changes their spending account enrollment at the end of the plan year.The change can occur only if the employee can take the deduction as an employee deduction. Example:

- The employee has a benefit event on 12/23.
- The pay period frequency occurs biweekly: 12/16 and 12/29.
- The pay date occurs on 1/3 of next year.
- The period ends in the current year, but Workday can't take the deduction until the next year.
- Workday prevents the enrollment from completing.

Calculate Your estimated contributions made this year.

Your employee enters these values during the enrollment.

Field	Value
Your number of remaining Payroll deductions for the year	15
Your estimated contributions made this year	600 - (25 * 15) = 225
How much do you want to contribute for the total year	600
How much do you want to contribute per paycheck Or How much do you want to contribute	25

Related Information

Concepts

Create Health Savings Account Plans on page 1306

Create Spending Account Plans on page 1310

Reference: Field Types for Health Care Expanded Plan Details

Workday delivers preconfigured expanded plan details for you to display to your employees. This topic describes the plan types and the coverage details that you can display. Workday also provides custom labels that you can configure for coverages that Workday doesn't provide. Example: You can use custom labels to display coverage details about onsite flu vaccinations for employees and their dependents.

- Plan Types and Available Coverage Details on page 1324
- Custom Benefits on page 1329
- Eye Wear on page 1329
- Hospital on page 1329
- Medical on page 1330
- Medical Equipment on page 1331
- Pharmacy on page 1332
- Services on page 1332
- Vision Care on page 1333

Plan Types and Available Coverage Details

In this table, we specify the type of benefit plan and the details that you can display to employees. We include links to the coverage values for each type of expanded plan detail.

Expanded Plan Detail	Medical	Dental	Vision	Available Coverage Details
Acupuncture	√			Medical on page 1330
Benefits Custom 1	√	√	√	Custom Benefits on page 1329
Benefits Custom 2	√	√	√	Custom Benefits on page 1329
Benefits Custom 3	√	√	√	Custom Benefits on page 1329
Chiropractor	√			Medical on page 1330
Chiropractors, Osteopaths, Acupuncturists, or Dietitians	√			Medical on page 1330
Cleaning/Scaling		√		Medical on page 1330
Coinsurance	√	√	√	• Medical on page 1330 • Services on page 1332

Expanded Plan Detail	Medical	Dental	Vision	Available Coverage Details
Contact Lenses			√	Medical on page 1330
Contact Lenses/ Eyeglasses			√	• Medical on page 1330 • Eye Wear on page 1329 • Vision Care on page 1333
Contact Lenses/ Eyeglasses/Laser Eye Surgery			√	• Medical on page 1330 • Eye Wear on page 1329 • Vision Care on page 1333
Copay	√	√	√	• Medical on page 1330 • Services on page 1332
Coverage	√	√	√	• Medical on page 1330 • Services on page 1332
Deductible	√	√	√	• Medical on page 1330 • Services on page 1332
Dental Extractions		√		Medical on page 1330
Dental Implant		√		Medical on page 1330
Dental Prostheses		√		Medical on page 1330
Diabetes Services	√			Medical Equipment on page 1331
Dietician	√			Medical on page 1330
DNA Testing	√			Medical on page 1330
Drug Costs	√			Pharmacy on page 1332

Expanded Plan Detail	Medical	Dental	Vision	Available Coverage Details
Eyeglasses			√	• Medical on page 1330 • Eye Wear on page 1329 • Vision Care on page 1333
Eyeglasses Frames			√	Vision Care on page 1333
Fillings/root canal		√		Medical on page 1330
FSA Employee Contribution	√			Medical on page 1330 (Doesn't include Age Limit, Coverage, Maximum Coverage Per Lifetime, Routine Exam, Specialist, Visits Per Year and Per Person).
FSA Employer Contribution	√			Medical on page 1330 (Doesn't include Age Limit, Coverage, Maximum Coverage Per Lifetime, Routine Exam, Specialist, and Visits Per Year).
FSA Qualified	√			Select to indicate whether the coverage detail is valid.
Hearing Aids	√			Medical on page 1330
Hospital	√			Hospital on page 1329
HSA Employee Contribution	√			Medical on page 1330 (Doesn't include Age Limit, Coverage, Maximum Coverage Per Lifetime, Routine Exam, Specialist,

Expanded Plan Detail	Medical	Dental	Vision	Available Coverage Details
				Visits Per Year and Per Person).
HSA Employer Contribution	√			Medical on page 1330 (Doesn't include Age Limit, Coverage, Maximum Coverage Per Lifetime, Routine Exam, Specialist, and Visits Per Year).
HSA Qualified	√			Select to indicate whether the coverage detail is valid.
Imputed Income	√			Select to indicate whether the coverage detail is valid.
Infertility Testing/ Treatment	√			Medical on page 1330
In Vitro Fertilization (IVF)	√			Medical on page 1330
Laser Eye Surgery			√	Medical on page 1330
Limited FSA Employee Contribution	√			Medical on page 1330 (Doesn't include Age Limit, Coverage, Maximum Coverage Per Lifetime, Routine Exam, Specialist, Visits Per Year and Per Person).
Limited FSA Qualified	√			Select to indicate whether the coverage detail is valid.
Mail-Order Drug Costs	√			Pharmacy on page 1332
Major Services		√		Medical on page 1330
Medical Labs	√			Medical on page 1330

Expanded Plan Detail	Medical	Dental	Vision	Available Coverage Details
Mental Health and Chemical Dependency	√			• Medical on page 1330 • Services on page 1332
Minor Services		√		Medical on page 1330
Non-Network Drug Costs	√			Pharmacy on page 1332
Occupational / Physical / Speech Therapy	√			Medical on page 1330
Office Visits	√	√	√	• Medical on page 1330 • Services on page 1332
Orthodontics		√		Medical on page 1330
Orthopedic Footwear/ Orthotics	√			Medical on page 1330
Out of Country Coverage	√			Medical on page 1330
Out-of-Pocket Annual Maximum	√	√	√	• Medical on page 1330 • Services on page 1332 (Doesn't include Maximum Coverage Per Lifetime, Maximum Coverage Per Year and Visits per Year).
Out-of-Pocket Lifetime Maximum	√	√	√	• Medical on page 1330 • Services on page 1332 (Doesn't include Maximum Coverage Per Lifetime, Maximum Coverage Per Year and Visits per Year).

Expanded Plan Detail	Medical	Dental	Vision	Available Coverage Details
Preventative Services		√		Medical on page 1330
Psychological Counseling	√			Medical on page 1330
Restorative Dental Treatment		√		Medical on page 1330
Retail Drug Costs	√			Pharmacy on page 1332
Vaccinations	√			Medical on page 1330
X-rays	√	√		Medical on page 1330
X-rays/Medical Labs	√	√		Medical on page 1330

Custom Benefits

Workday provides 3 sets of custom labels for you to configure expanded plan details that are unique to your organization. Each custom plan detail has a label along with 4 possible available coverage detail labels. You can configure the custom benefits with the Maintain Custom Labels task.

Example: You can configure coverage details for onsite vaccinations:

Custom Benefit	Custom Label
Benefits Custom 1	*Onsite Flu Vaccinations*
Benefits Custom 1a	*Employee - Free*
Benefits Custom 2a	*Spouse/Domestic Partner - $10*
Benefits Custom 3a	*Dependent - $5*

Eye Wear

This table lists the coverage details for eye wear that you can configure and identifies whether you can use custom labels for the coverage detail.

Coverage Detail	Custom Label	Percentage	Currency Amount	Yes/No
Custom progressive lens	√	√	√	√
Premium progressive lens	√	√	√	√
Standard progressive lens		√	√	√

Hospital

This table lists the coverage details for hospital care that you can configure and identifies whether you can use custom labels for the coverage detail.

Coverage Detail	Custom Label	Percentage	Currency Amount	Yes/No
Ambulance	√	√	√	√
Deductible			√	√
Emergency Room	√	√	√	√
In Network	√	√	√	√
Inpatient		√	√	√
Out of Network	√	√	√	√
Out-of-Pocket Annual Maximum			√	
Out-of-Pocket Lifetime Maximum			√	
Outpatient	√	√	√	√
Private Room	√	√	√	√
Semi-Private Room	√	√	√	√
Urgent Care	√	√	√	√

Medical

This table lists the medical coverage details that you can configure and whether you can use custom labels for the coverage detail.

Coverage Detail	Custom Label	Percentage	Currency Amount	Numerical Values	Yes/No	Day/Month/ Year
Age Limit						Months or Years
Coverage		√		√	√	
Coverage Level 1		√	√		√	
Coverage Level 2		√	√		√	
Coverage Level 3		√	√		√	
Coverage Level 4		√	√		√	
Family		√	√		√	
Family (Network)		√	√		√	
Family (Non-Network)		√	√		√	
Individual	√	√	√		√	

Coverage Detail	Custom Label	Percentage	Currency Amount	Numerical Values	Yes/No	Day/Month/ Year
Individual (Network)	√	√	√		√	
Individual (Non-Network)	√	√	√		√	
Individual + DP/ Spouse or Child(ren)	√	√	√		√	
Individual + DP/ Spouse or Child(ren) (Network)	√	√	√		√	
Individual + DP/ Spouse or Child(ren) (Non-Network)	√	√	√		√	
In Network		√	√		√	
Maximum Coverage			√			
Maximum Coverage per lifetime			√			
Maximum Coverage per year			√			
Out of Network		√	√		√	
Per Person				√		
Routine Exam		√	√		√	
Specialist		√	√		√	
Visits per year				√		

Medical Equipment

This table lists the coverage details for medical equipment that you can configure and identifies whether you can use custom labels for the coverage detail.

Coverage Detail	Custom Label	Percentage	Currency Amount	Numerical Values	Yes/No
Glucose Monitors		√	√	√	√
Insulin Pump	√	√	√	√	√
Self-Management Training	√	√	√	√	√

Pharmacy

This table lists the coverage details for medication that you can configure and whether you can use custom labels for the coverage detail.

Coverage Detail	Custom Label	Percentage	Currency Amount	Numerical Values	Yes/No	Day/Month/ Year
Brand (Nonpreferred)	√	√	√		√	
Brand (Preferred)	√	√	√		√	
Brand (Specialty)	√	√	√		√	
Coverage Maximum		√	√		√	
Days of Supply						Days
Generic		√	√		√	
HSA Qualified					√	
Imputed Income					√	
Insulin		√	√		√	
Preventive Drugs		√	√		√	

Services

This table lists the coverage details for medical services that you can configure. It also identifies whether you can use custom labels for the coverage detail.

Coverage Detail	Custom Label	Percentage	Currency Amount	Yes/No
Basic Services	√	√	√	
Major Services		√	√	√
Preventative Services	√	√	√	

Vision Care

This table lists the coverage details for vision care that you can configure and identifies whether you can use custom labels for the coverage detail.

Coverage Detail	Custom Label	Percentage	Currency Amount	Yes/No
Featured Frames	√	√	√	√
Most Frames		√	√	√

Related Information
Concepts
Create Health Care Plans on page 1289
2022R1: What's New Post: Benefit Election Decision Support
Example: Add Expanded Details for Medical Plans on page 1320

FAQ: How do I stop calculated insurance coverage amounts from displaying?

You can prevent an employee's calculated insurance coverage amount based on percent of salary from displaying on benefit reports. Update the security policies in the Core Compensation functional area for these domains:

- *Self-Service: Insurance Calculated Coverage*
- *Worker Data: Insurance Calculated Coverage*

Hidden calculated coverages apply to all calculated coverage amounts regardless of benefit coverage type. However, insurance coverage amounts based on flat amounts still display.

Related Information
Concepts
Create Insurance Plans on page 1295

FAQ: How do I make HSA contribution changes without a qualifying event?

In Workday, you can configure the enrollment process so that employees can elect or change HSA contributions in response to a qualifying event. Qualifying events include a dependent or marital status change. You might, however, also want to give employees the ability to elect or change HSA contributions in the absence of a specific qualifying event.

When you define the events that open the enrollment process on the Maintain Enrollment Event Types report, create an event called *HSA Contribution Change*. This event must include only the HSA coverage types, and it must have the Worker Selectable option to enable employees to initiate HSA changes.

Related Information
Concepts
Workday Community: COVID-19 - Stop HSA and FSA Deductions for Workers on Paid Leave

Benefit Programs

Steps: Set Up Benefit Programs

Context

You can deliver benefit program content to workers that display to workers in locations that you specify. You can have benefit program partners import content with web services, such as benefit plan information. The benefits administrator can also create the cards in Workday and display them to workers.

Steps

1. (Optional) Set Up Security and Endpoints for External Benefit Program Partners on page 1334.
2. Enable a benefits provider to be a benefits program partner so that you can create and manage program cards for the provider. Security: *Set Up: Benefits*.
    a) Access the Create Benefit Providers or Edit Benefit Providers task.
    b) Select the Benefit Program Partner check box.
3. Configure Benefit Program Cards on page 1335.
4. (Optional) Set Up the Worker Wellbeing Profile Card on page 1339.

Related Information
Concepts
Concept: Benefit Program Cards on page 1341

Set Up Security and Endpoints for External Benefit Program Partners

Prerequisites

Security:

- Manage: Benefit Program Software Partner
- Manage: Benefits for Organizations

Context

You can enable benefits program partners to create and import program cards for your employees. You can use the Maintain Benefit Programs task to specify which employees see the cards and where they display. Cards can have up to 3 lines of text and an image. Workday provides a web service that enables the benefits program partners to build a certified integration. We provide a security domain specifically for the program partner.

This task describes the steps that the benefits administrator performs to enable the benefit program partner to create and import the programs.

Steps

1. Configure security for benefits program partners.
    a) Create the integration system user account, which enables you to set up a Workday account for software partners.
    b) Select Do Not Allow UI Sessions to restrict the account for integrations only.
    c) Select the Security Profile-related action from the new Workday account.
    d) Select Assign Integrations System Security Groups.
    e) Add the account to an existing or new integration security group, which must be unconstrained.
    f) Edit the *Manage: Benefit Program Software Partner* domain security policy and give the relevant security groups view or change access.
    g) (Optional) Include the account on the Manage Authentication Policies report.
    h) Access and run the Activate Pending Security Policy Changes task.
2. Provide an endpoint URL to the benefit program partner:
    a) Sign into the tenant for your endpoint.
    b) Run the Public Web Services report and locate the *Benefits Partner Program Integrations* web service for benefit program cards. For cards that display on the on the Wallet page of the Benefits and Pay Hub, locate these web services:

Put_Worker_Benefit_and_Wellbeing_Wallet_Cards, *Benefit_Provider_Reference*, and *Coverage_Type_Reference*.

c) From related actions of the web service, select Web Service > View WSDL.
d) Go to the end of the file and locate this line, where [*link*] is the WSDL ID that you provide.

```
<soapbind:address location =“[link]”>
```

e) Send the end point to the benefits program partner.

Result

The *Put Benefit Partner Program* web service becomes available to the benefits program partner.

Next Steps

Configure program cards.

Related Information

Tasks

Concept: Benefit Programs on page 1341

Configure Benefit Program Cards

Prerequisites

- Select the Benefit Program Partner check box on the Edit Benefit Providers task.
- Security:
    - Manage: Benefits for Organizations
    - Self-service: Benefit Elections
    - Self-Service: Benefits
    - Self-Service: Benefits and Pay Hub
    - Set Up: Benefits
    - Worker Data: Benefits

Context

Program cards contain information that you need to communicate to workers. They contain text, images, and links for users to follow for further information. Benefit administrators can create content or authorized benefit program partners can import content using the *Benefits Partner Program Integrations* web service. See Set Up Security and Endpoints for External Benefit Program Partners on page 1334.

Steps

1. Access the Maintain Benefit Programs task.

   Note: You see content on this page only if you've enabled a provider as a program partner with the Edit Benefit Provider task.
2. Create new cards related to a provider by selecting the provider name and clicking the + button.

   (Optional) For program content that isn't related to a provider, access the Create Benefit Provider task. Create a provider with a name that meets your organizational requirements. Example: Internal Benefit Programs. Be sure to select the Benefit Program Partner check box.
3. As you complete this task, consider:

Option	Description
Display Order	Specify the order in which the program cards display.

Option	Description
Enabled	Select to display the benefit program card in your tenant. Note: Selecting this check box displays the program card based on the Start Date value. We recommend that you preview the card before selecting this check box.
Title	Enter the name of the benefit program. Example: Open Enrollment.
Description	Enter the text for the program card. Example: Get ready for open enrollment by reviewing your new benefits options!
Start Date	Select the date when Workday displays the program card.
End Date	Select the date when Workday stops displaying the program card.
Benefit Group	Select 1 or more benefit groups that can see the program card.
Benefit Coverage Type	Select benefit coverage types for the program card. Example: Medical, Dental, Vision. • Required for My Tasks, benefit plan selection, and an election submission confirmation. • Optional for the Overview section of the Benefits and Pay Hub and the Total Rewards statement. When selecting coverage type for the Overview section of the Benefits and Pay Hub and the Total Rewards statement, Workday displays a program card for eligible workers. A worker is eligible when: • They received the coverage type in a previous enrollment. • You offer them the coverage type in a current event (including statuses of *Not Started*, *In Progress*, or *Submitted*). • You offer them the coverage type in a close or finalized future-dated event. Note: If you don’t select a coverage type for a card, Workday will automatically display the card in the Overview section of the Benefits and Pay Hub, and in the Total Rewards statement (if you select those locations) for the workers in the selected benefit groups once the card is enabled within the specified start and end dates. You also must select a coverage type when you select 1 or more of these Benefit Program Locations:

Option	Description
	• *Benefit Plan Selection* • *My Tasks* • *Submit Election Confirmation*
Benefit Plan	Select 1 or more benefit plans for the program card.
Benefits Program Location	Select in which of these locations to display the benefit program card: • My Tasks. • The Benefits and Pay Hub, under the Discover Your Rewards section. • During benefit plan selection. • The enrollment confirmation page when the worker submits their elections. • Total Rewards statement.
Image	Upload 1 image for the program card.
Program Card Section Title Override	Override the Discover Your Rewards section title. Example: What's New with your Benefits?
URL	Enter a link to information about the program. Example: A link to a list of health care benefits.
URL Alias	Enter a user-friendly link for web pages to makes it easier for workers to navigate the web site. Example: You have a URL for a list of health care benefits: `https://www.gms.com/benefits/healthcare/benefitslist.html`. You can enter a URL alias of `https://www.gms.com`.
Wellbeing Interest	Select the interests that workers can select from. Example: You can enable the Financial category to include the Retirement interest. You define these interests when configuring the worker wellbeing profile. See Set Up the Worker Wellbeing Profile Card on page 1339.
Admin Notes	Displays information provided to the benefits administrator from the benefits program partner.
Source	Displays *Local* if you create the card in Workday and *Imported* if a benefits program partner imported the card into Workday.

4. Click OK and click the Preview button to display the program card.

Result

After you select the Enable check box, workers can see the information in the program card beginning on the start date.

Related Information

Examples

2024R1 What's New Post: Benefits Program Communication Cards

2023R2 What's New Post: Benefits Partner Enrollment and Hub Communication

Configure the Benefits and Wellbeing Wallet

Prerequisites

- Set Up Security and Endpoints for External Benefit Program Partners on page 1334.
- Security:
    - *Set Up: Benefits* domain in the Benefits functional area.
    - *Manage: Benefit Program Software Partner* domain in the Benefits functional area.
    - *Integration Build* domain in the Integration functional area.

Context

You can configure and display program cards targeted to specific workers on the Wallet page of the Benefits and Pay hub. See: Reference: Benefits and Pay Hub on page 1060.

Workers can then easily view their benefits information on their mobile devices, enabling them to access their benefits information on the go.

Steps

1. Access the Create Benefit Providers or Edit Benefit Providers task.

   Select the Benefit Program Partner check box.
2. Provide the benefit program partner with the request information that they use to import wallet data.
    a) The End Point URL: Run the Public Web Services report and locate the *Put_Worker_Benefit_and_Wellbeing_Wallet_Cards* web service. From the related action, select Web Service → View WSDL. Go to the end of the file and locate the WSDL ID link.
    b) The *Benefit_Provider_Reference*: Access the Benefit Provider task and find the benefit provider you want. From the related action, select Integration ID → View IDs.

       You can also find this value in the Provider ID field on the Benefit Provider report.
    c) The *Coverage_Type_Reference*: Access Benefit Coverage Types report and select the coverage type that you want. From the related action, select Integration ID → View IDs.

       You can also find this value in the Coverage Type ID column of the Maintain Benefit Coverage Types task.
3. Access the Maintain Benefit and Wellbeing Wallet task and configure the Wallet page on the Benefits and Pay hub.

   As you complete the task, consider:

Option	Description
(Optional) Wallet Page Overrides	Enter a custom page label and description. The label displays as the title of the Wallet page of the Benefits and Pay hub.
Section Overrides	• Enable the sections that you want to display on the Wallet page and optionally enter custom display labels for each section. • (Optional) Enter custom instructional text.

Option	Description
(Optional) View Details Overrides	Enter a custom label for the Additional Information link. Example: Related Information.

4. (Optional) To customize the Wallet tab label that displays in the Benefits and Pay hub, access the Maintain Hubs task.

   Select the Custom Hub Navigation option from the Actions menu next to the Benefits and Pay hub.

   Click Override next to Wallet and update the name.
5. Configure and import worker-specific card details using these web services:
   - *Put Worker Benefit and Wellbeing Wallet Cards* for a single card type. The request includes the Card ID, Benefit Provider, Coverage Type, Plan Name, Opt In Preference Link, Logo, and Worker ID.
   - *Bulk Import Put Worker Benefit and Wellbeing Wallet Cards* for multiple card types. The request includes the Card ID, Benefit Provider, Coverage Type, Plan Name, Opt In Preference Link, Logo, and Worker ID.

   Note: This step is for the benefits program partner.

   Because the Plan Name field is an attribute, Workday recommends that the name used by the benefit program partner matches the benefit plan name in Workday.

   When the program partner imports the card into the worker's wallet, Workday displays a generic card until the worker links their account. When the worker changes their opt-in display preference on the partner's site, the provider can then update worker cards with detailed information.
6. Audit workday wallet data.

   Note: This step is for the benefits program partner.

   Use the *Get Wallet Opt In Preference* web service to retrieve a list of the workers who have opted-in to wallet cards.

   The benefits program partner can run audits to confirm that Workday displays the detailed cards for the correct workers compared to the partner's own records.

Result

Workers can now access the Wallet page in the Benefits and Pay hub to view their specific benefits cards.

Related Information
Examples
2024R2 Feature Release Note: Benefits and Wellbeing Wallet

Set Up the Worker Wellbeing Profile Card

Prerequisites

- Configure Benefit Partner Programs.
- Security: *Setup: Benefits* in the Benefits security domain.

Context

Workday enables you to configure delivered wellbeing interests that you customize for your workers. You can select from a list of categories and interests and make the Benefit Wellbeing Interests card available in 1 or more locations. Workers can then select the interests for the types of content that they want to see.

Example: You select *Occupational (Growth & Career)* as one of the wellbeing categories that you plan to provide content for. Within that category, you select these interest areas: *Learning* and *Professional Training*. Later, when a worker chooses their wellbeing interests, they select *Learning*. If you deliver program cards tagged with these 2 interests, then the worker sees the card with learning content, but not the card with the professional training content.

Steps

1. Configure the Wellbeing Profile categories and interests from which you want workers to select.
    a) Access the Maintain Benefits Wellbeing Interests task.
    b) On the Edit Wellbeing Interests tab, add the categories and corresponding interests.
    c) (Optional) Use the override fields to customize the names of the categories and interests to reflect your organizational needs.
    d) On the Edit Display Locations tab, select 1 or more of these display locations of the card:
    - Worker Profile
    - People Experience Workspace
    - Benefits and Pay Hub
2. Add the Benefits Wellbeing Interests card to the Worker Profile.

    Ensure that you've selected Worker Profile from the Edit Display Locations tab of the Maintain Benefits Wellbeing Interests task.
    a) Access the Configure Profile Summary task.
    b) Select Worker Profile.
    c) Add a row and select the *Wellbeing Interests* option to add the card to the profile.
3. Add the Benefits Wellbeing Interests card to the People Experience Workspace.

    Ensure that you've selected Worker Profile from the Edit Display Locations tab of the Maintain Benefits Wellbeing Interests task.
    a) Access the People Experience Workspace report.
    b) Select Cards from the left navigation panel.
    c) Select the Add Card button.
    d) Select the Benefits Wellbeing Interests check box.
    e) Click the Unpublished status prompt in the Benefit Wellbeing Interest row. Select the *Publish* option to add the card to the Home page.
4. Add the Benefits Wellbeing Interests card to the Benefits and Pay Hub.

    Ensure that you've selected Benefits and Pay Hub from the Edit Display Locations tab of the Maintain Benefits Wellbeing Interests task.
    a) Access the Maintain Hubs task.
    b) From the Actions prompt of Benefits and Pay, select Configure Overview. Select Customize Sections and Cards.
    c) In the row for Benefits and Pay Hub - Overview Page - Needs Attention Section, add the *Empty Worker Wellbeing Card for Benefits and Pay Hub* card.
    d) In the row for Benefits and Pay Hub - Overview Page - Overview Section, add the Worker Wellbeing for Benefits and Pay Hub card.

Result

A card displays in the selected locations asking workers to select or edit their wellbeing interests.

Next Steps

Access the Benefits Wellbeing Interest Aggregated Data report to see how many workers have added each wellbeing interest to their profile. You can use this report to gain insights about what your employees care most about.

Related Information

Examples

2024R2 Feature Release Note: Worker Wellbeing Profile and Program Cards

Concept: Benefit Program Cards

Workday enables you or an external *benefit program partners* to create or import benefit program content and personalized worker benefit information. This information can include both text and images. You can configure the program content to display in program cards in these locations:

- My Tasks.
- The Benefits and Pay Hub.
- During benefit plan selection.
- The enrollment confirmation page when the worker submits their elections.
- Total Rewards Statement.

You can configure personalized worker benefit information to display in these sections of the Wallet page in the Benefits and Pay Hub:

- Health Care
- Financial
- Wellbeing

Example:

An external benefit program partner creates the content announcing a financial seminar on retirement investments for your organization. They import the program content with the *PUT Benefit Program* web service.

As the benefits administrator, you configure the visibility of the program by selecting the location and the dates on which Workday displays the cards. You select the title of the program and the dates of November 1 through November 14. You also select the Benefits and Pay Hub and My Tasks as display locations. You then select Enable to display the card in the locations you've selected.

Related Information

Tasks

Steps: Set Up Benefit Programs on page 1333

Enrollment Events and Rules

Steps: Set Up Enrollment Events and Rules

Prerequisites

Create benefit groups to associate with enrollment event rules.

Steps

1. Create Enrollment Events on page 1343

   Create the enrollment events that result in a change in eligibility or entitle employees to change existing elections.
2. Create Enrollment Event Rules on page 1349

   Create the rules that control how enrollment events are processed.
3. (Optional) Steps: Set Up Automatic Benefit Eligibility Checks on page 1342

   Workday can run a benefit eligibility check to see if an employee's benefit coverage is affected by a staffing event. To run the benefit eligibility check, add the *Change Benefits for Life Event* action to the business process associated with the staffing event.
4. (Optional) Create Conditional Messages for Enrollment Events on page 1359

   Use condition rules to create notification and confirmation messages that are specific to an event type.

Related Information

Tasks

Steps: Set Up Benefits on page 1237

Create Benefit Groups on page 1249

Reference

Troubleshooting: Enrollment Events on page 1372

Steps: Set Up Automatic Benefit Eligibility Checks

Context

Set up Workday to check automatically if specific staffing, position, or compensation events have affected an employee's benefit coverage. If so, Workday sends a task to My Tasks to the role specified on the business process.

Steps

1. Create Enrollment Events on page 1343.
2. Create Enrollment Event Rules on page 1349.
3. Add the Change Benefit Elections business process as a step to business processes.

Business Process	Guidelines Regarding Placement
Add Additional Job	Add after the completion step.
Change Job	If you add the business process *Propose Compensation* , add after the *Propose Compensation Change*. Otherwise, add after the completion step.
Change Organization Assignments for Worker	Add after the completion step.
Change Primary Address	Add after the completion step.
Edit Position	Add after the *Request Compensation Change* and the completion step for the *Edit Position* steps.
End Additional Job	Add after the completion step.
Hire	Follows the *Create Workday Account* step, but doesn't have to be immediately after. The best placement depends on condition rules associated with this action and the eligibility rules used to determine eligibility.
Request Compensation Change	Add after the completion step.
Request Leave of Absence	Add after the completion step.
Request Return from Leave of Absence	Add after the completion step.
Termination	Add after the completion step.

Result

The *Change Benefit Elections* action runs the *Change Benefits for Life Event* business process. This business process uses the *If there is an effect on employee benefits?* condition rule to determine whether to create a benefit event. This condition rule determines:

- Whether an employee's current elections have caused a gain or loss in the employee's benefit coverage.

  If Workday uses eligibility rules to determine if the employee has lost or gained benefit coverage. If yes, Workday creates a benefit event.
- The default behavior.

  Workday checks the Defaulting Rules selected in the Coverage Rules tab on the Create Enrollment Event Rule task. If there’s a match, Workday creates a benefit event:

  - *Default to Priority Coverage* or *Waive*
  - *Default to Waive*

  Workday creates an event if you selected one of these options and there's a change in the employee's benefit coverage:

  - *Default to Current Elections, Priority Coverage*, or *Waive*.
  - *Default to Current Elections or Waive*.
- What the employee can do.

  Workday checks the Allowed Benefit Plan Changes selected in the Coverage Rules tab on the Create Enrollment Event Rule task. If you selected one of these options, Workday creates a benefit event:

  - *Can Select Any Plan* - Select any plan included in the specified benefit coverage types, including the option to waive.
  - *Current Plan Only* - Change only the details of the benefit plans in which workers are currently enrolled. There's no option to waive. Can add or remove dependents.
  - *Current Plan or Option to Decrease* - (Only Spending or HSA) Decrease contributions or keep at the current level.
  - *Current Plan or Option to Increase* - (Only Spending or HSA) Increase contributions or keep at the current level.
  - *Current Plan or Option to Waive* - Change only the details of the currently enrolled benefit plans, including the option to waive. Can add or remove dependents.

  If you selected one of these options, Workday creates an event when the current benefit coverage has a change in amount or eligibility:

  - *Only on Eligibility Change*.
  - *No changes allowed*.

Workday finalizes the event 1 day after the termination date if benefit coverage has terminated or workers can't make any plan changes. Workday doesn't send a notification to the employee. To send a notification, add a condition rule to the business process.

Note: As you add the *Change Benefit Elections* step to more business processes, review your enrollment event rules. Make sure all your benefit event types have defined rules. Workday combines events that occur on the same day.

Create Enrollment Events

Prerequisites

- Define benefit coverage types.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

Create the enrollment events that either:

- Result in an increase or decrease in benefit eligibility.

- Enable an employee to change current elections.

Enrollment events can be:

- Open enrollment: A period when employees can make additions and changes to their benefit elections.
- Benefit events: Specific qualifying events that open the enrollment process or trigger a gain or loss of benefits. Examples: Staffing, personal changes, and administrative changes.
- Passive events: Events that result from the passage of time rather than from specific changes to employee data. Example: A dependent child reaches age 26.

You can create custom validations to display errors and warnings to prevent workers from submitting elections with mistakes. Example: Require workers to add attachments for evidence of insurability documents or required documents for new dependents.

Steps

1. Access either:
   - Create Benefit Event Type task.
   - Create Open Enrollment Event Type task.
2. As you complete this task, consider:

Option	Description
Enrollment Offering Type	Example: For a birth event you can give employees the ability to elect or change medical, basic life, and supplemental life.
Worker Selectable	Applies to benefit events only. Enable workers to initiate the enrollment process using the Change Benefits task. A Benefit Partner or Administrator can report any type of event.
Route Enrollment to Benefits Partner	Applies to benefit events only. Select to send the Enroll in Benefits notification to the Benefits Partner so that the Benefits Partner can enter the employee's elections. Clear to send the Enroll in Benefits notification to the employee so that the employee can enter their own benefit elections. Note: Update the related business process to ensure that Workday correctly routes the event based on these selections. Don't route enrollment tasks for automated benefit processes to employees or Benefits Partners using the Maintain Enrollment Event Types report. Instead, target enrollment tasks to a role or security group directly in the business process definitions.
Restricted to Countries	Select 1 or more countries. You can limit this enrollment event type to employees in a benefit group that includes these countries. To enable employees to participate in an enrollment

Option	Description
	event for the country, select that country in the benefit group.

3. For benefit events, consider:

Option	Description
Reinstatement Event	Select to reinstate benefits coverage for rehires or employees returning from a leave of absence within an eligibility period. If either event occurs outside of the reinstatement eligibility period, Workday handles the event with the processes you define for nonreinstatement.
Reinstatement Period Time Units	Workday calculates the beginning of the eligibility period in this order: • Start on the rehire date or return from leave date. • Subtract the reinstatement period time. • Select the first day of the Unit of Time (month or year). If you select zero Reinstatement Period Time Units for any Unit of Time, a reinstatement period becomes eligible when these dates occur in the same Unit of Time: • Departure date. • Rehire or return from leave date. Example: Your reinstatement period is 2 months. If an employee's rehire occurs on August 15, the calculated eligibility period is June 1 to August 15. If their departure date occurs within this interval, the employee's benefits are eligible for reinstatement.

4. For benefit events, consider:

Option	Description
Days to Enroll Calculation	Define the benefit enrollment period for a specific type of benefit event. Select whether Workday uses: • The initiation date of the event. • The date of the event; this date starts the enrollment period.
Days to Enroll	Enter the number of days that determine the end date for the enrollment period. Start with the date defined for the Days to Enroll Calculation. Note: Workday only respects this date if the worker initiates a benefit enrollment event with the Change Benefits task. Workday recommends that you create a validation on

Option	Description
	the *Dependent Event* business process. The validation enforces Days to Enroll for when the worker initiates the Add Dependent task.
Employee Cannot Report After Days to Enroll	Select to prevent employees from reporting a benefit event after the enrollment period has passed.

5. For Coordination of Events, consider:

Option	Description
Do Not Reprocess Future Events	Disables coordination of events for this type of benefit event when it has an *earlier* event date than the current benefit event. Example: • Marital Status Change has an event date of July 1. • Beneficiary Change has an event date of June 1. Normally, Workday places the Marital Status Change *on hold* and processes the Beneficiary Change. After completing the Beneficiary Change, Workday rescinds the Marital Status Change and creates a new event. By selecting this check box for the Beneficiary Change, Workday doesn't place Marital Status Change *on hold* and proceeds as normal without any reprocessing. This check box doesn’t apply to events where an employee has a gain or loss in benefit eligibility.
Do Not Reprocess	Disables coordination of events for this type of benefit event when it has a *later* event date than the current benefit event. Example: • Open Enrollment has an event date of January 1. • Beneficiary Change has an event date of December 20. Normally, Workday places Open Enrollment *on hold* and processes the Beneficiary Change. After completing the Beneficiary Change, Workday then rescinds Open Enrollment and creates a new event. When selected, Workday doesn't place the Open Enrollment *on hold* and proceeds as normal. This check box doesn’t apply to events where an employee has a gain or loss in benefit eligibility.

Option	Description
Days to Enroll	The number of days the worker has to complete their benefit enrollment, based on the date when Workday created the new event. This value depends on when the days occur if Workday: • Puts an enrollment event on hold. • Recreates the event because of Coordination of Events. If the minimum number of days occurs: • Within the enrollment period, the employee gets the full enrollment period. • Outside of the enrollment period, the employee has only the number of days defined in this field.

Note: You can enable coordination of events between web service events and future-dated events that you create in Workday. Select Enable Coordination of Events for the Change Benefits Web Service in the Edit Tenant Setup - HCM task. When selected, Workday reprocesses eligible future-dated events when the web service creates earlier-dated events.

6. For Reopen Options, consider:

Option	Description
Enable Reopen of Open Enrollment Event	Enables employees to reopen their open enrollment event to make changes after the event is Closed or Finalized. Benefits Administrators and Partners can also reopen an employee's open enrollment event.
Days in Reopen Period	The number of days the employee has the opportunity to reopen their open enrollment event after the last day of the open enrollment period.
Days to Enroll	The number of days the employee has to enroll in elections after they've reopened their open enrollment event. The greater the value, the greater the risk for the employee to have a lapse in coverage.

7. For Benefit Event Codes, consider:

Option	Description
Pre-Tax Event Code Post-Tax Event Code Life Insurance Event Code	(U.S. Federal) Add unique event codes to your benefit event types. Example: Assign the Life Insurance Event Code 2 to indicate the event allowing an insurance change is a life event, such as marriage or adoption. Workday recommends you only enter a Pre-Tax Event Code for FEHB event types, and handle post-tax deductions and event codes manually.

Option	Description
	To reveal these fields, access the Configure Optional Fields task, then select Create Benefit Event Type. Next, delete the row labeled *Federal*.

8. For benefit events, add Events and Reasons.

Option	Description

Event	Use to map an enrollment event when you've modified a business process to include either of these business processes:
	• *Change Benefits for Life Event*.
	• *Change Benefit Jobs*.
	• You can configure the *Change Benefit Election for Compensation Changes* step on these business processes when a compensation change affects an employee's benefits:
	  • *Initiate Compensation Review Process*.
	  • *Propose Compensation Change*.
	  • *Propose Compensation Hire*.
	  • *Request Compensation Change*.
	  • *Request Employee Merit Adjustment*.
	When you configure the step on a compensation process, Workday can automatically create benefit events when a compensation change impacts calculated insurance coverage or rates.
	When you rescind a merit event with a corresponding benefit event, Workday doesn't rescind the benefit event.
	Note: These business processes are for future use. Don't use:
	  • *Change Default Compensation*.
	  • *Propose Compensation Offer/ Employment Agreement*.
	  • *Requisition Compensation*.

Restricted by Reason	If you want the benefits eligibility check to run only when the business process includes specific reasons, select those reasons here. Note: Use restriction reasons only if you have different events for job changes. If you leave out a reason from the list, Workday doesn't create an event for the event type. Example: You add the *Job Change* event and select *Demotion* and *Transfer* restriction reasons. The employee gets a promotion, but Workday doesn't create an enrollment event

Option	Description
	because you haven't selected *Promotion* as a restriction reason. If you leave the field blank, the benefits eligibility check runs every time the business process occurs. • For leave-related business processes, create reasons using the Create Leave Type task. • For organization-related and *Change Primary Address* business processes, no reasons are available. • For staffing and compensation-related business processes, create reasons using the Maintain Event Categories and Reasons task. • For terminations, define categories and reasons for terminating employment with these tasks: Maintain Termination Categories and Maintain Local Termination Reasons tasks.

Next Steps

- Use the Maintain Enrollment Event Types report to make changes.
- Use the Edit Benefit Event Type or Edit Open Enrollment Event Type task to make changes.
- Use the Enrollment Event Types report to display a list of all the benefit event and open enrollment event types.
- Use the Edit Enrollment Event Rule task to add your reinstatement event.

Related Information

Concepts

Concept: Coordination of Benefits Enrollment Events on page 1363

Concept: Enrollment Period for Benefit Events on page 1362

Tasks

Steps: Set Up Enrollment Events and Rules on page 1341

Reference

The Next Level: Troubleshooting Benefits

Create Enrollment Event Rules

Prerequisites

- Define enrollment events.
- Security: *Set Up: Benefits* domain in the Benefits functional area.

Context

Create rules that Workday uses to process enrollment events. Examples:

- Waiting periods.
- Coverage beginning and ending dates.
- Deduction beginning and ending dates.

- Grace periods for ending coverage.
- Coverage changes with and without evidence of insurability (EOI).
- Default coverage rules.
- Reinstatement of benefits coverage.

Associate event rules with benefit groups using the Create Benefit Group task.

Steps

1. Access the Create Enrollment Event Rule task.
2. As you complete the Start or Waive Coverage tab, consider:

Option	Description
Benefit Coverage Type	Select all benefit coverage types used by the selected event types. Workday uses the coverage types, as configured on the event type and the enrollment event rule, to determine any changes in eligibility. If there are changes, Workday creates an enrollment event for the employee. For coverage types without explicit event rules, Workday uses *Can Select Any Plan* from the Allowed Benefit Plan Changes prompt.
Waiting Period Number and Waiting Period Units	Waiting periods apply to employees who are newly eligible for a benefit and didn't have coverage of the same type before the enrollment event. Newly eligible could be from a hire, promotion, or other enrollment event. Workday uses the Waiting Period Calculation Order on the Create Benefit Group task to determine whether to add the waiting period before or after the Coverage Begin Date.
Ignore Waiting Periods	Overrides the waiting period for event types. Consider whether to select this check box if you select *First of Month On or After the Later of Event or Submission Date* choice for Coverage Begin Date.
Coverage Begin Date	Select the rule to determine the date that benefit coverage begins. You can specify a coverage begin date for all benefit plans that belong to a given coverage type, for events that: • Enable employees to waive existing coverage. • Result in coverage gains, such as job changes. You can specify that coverage begins on the *First of Month On or After the Later of Event or Submission Date*. To avoid coverage delays with this option, select the Ignore Waiting Periods check box. The remaining pay periods don't recalculate.

Option	Description
	Examples: • If the submission date is February 1 and the event date is February 20, the coverage begin date is March 1. • If the submission date is April 1 and the event date is March 20, the coverage begin date is April 1. If the *Change Benefits* business process has an approval step, the submission date is the approval date. You can also specify that coverage begins *On Pay Period Begin On or After the Later of Event or Submission Date*. Example: Pay periods are June 27 - July 10, and July 11 - July 26. If the submission date is June 26, and the event date is July 8, then the coverage begin date is July 11. This is the start of the pay period following the later of the 2 dates. This option and *Later of Event or Submission Date* are only available for life change event enrollment types, such as new hire, family status change, or administrative correction. Workday uses the electronic signature date as the submission date. If there's no electronic signature, Workday uses the completion date of the *Change Benefits for Life Event* business process as the submission date. For options that set the coverage begin date as the first day of the worker's pay period, Workday uses the pay period schedule associated with the pay group tied to the worker's primary position. During a benefit event, Workday updates the Coverage Begin Date for a worker's benefit plan when any of these items change as a result of a benefit event: • Health Care - Benefit Plan and Coverage Target • Health Savings Account - Benefit Plan and Employee Contribution Amount (per paycheck amount) • Spending Account - Benefit Plan and Employee Contribution Amount (per paycheck amount) • Insurance - Benefit Plan, Coverage Level, and Covered Dependents • Retirement Savings - Benefit Plan, Amount, Percent, Employee Contribution

Option	Description
	Allocation Percent, and Employer Contribution Allocation Percent • Additional Benefits - Benefit Plan, Coverage Target, Amount, and Percent
Deduction Begin Date	Select the rule to determine which pay period to take the deduction or start the credit.

3. Complete the Loss of Coverage tab.

   For events that result in coverage losses, define the:

   - Coverage End Date

     For job changes, Workday uses the effective date of the job change for the event date. For terminations, Workday uses the event date + 1 day for the effective date. Example: The termination date is 7/1. The event date is 7/1, but the effective termination date is 7/2.

     To determine the month of the event date, Workday uses the month of the day before the event date. Example: If the event date is 7/1, then the Workday uses the month of June. If the event date is 7/2, then Workday uses the month of July.
   - Deduction End Date
   - Grace Period Number to extend coverage beyond the coverage end date for a given coverage type.
4. On the Levels of Change - Currently Covered tab, create the rules for processing changes to insurance coverage when the employee currently has insurance coverage. As you complete this tab, consider:

Option	Description
Maximum Levels of Change Allowed	Enter the maximum number of levels that employees can increase coverage during enrollment for this event type. Examples: • Your benefit plan offers 2x, 3x, 4x, and 5x salary, and you enter the value 2 for the Maximum Levels of Change Allowed. If an employee has a current coverage of 2x salary, they can increase their coverage up to 4x salary. • Your benefit plan offers 50,000 – 100,000 – 150,000 – 200,000 USD coverage levels. You enter a value of 1 in this field. If an employee currently has coverage of 50,000 USD, they can increase their coverage to 100,000 USD.
Maximum Amount of Change Allowed	Enter the maximum amount that employees can increase coverage during enrollment for this event type.
Include All Benefit Plans in Coverage Type for EOI	Select to use the combined total election for all benefit plans in a coverage type to determine when to require EOI. If selected, make sure to select this option on all of the Levels of Change tabs.

Option	Description
	Note: Don't select auto-enrolled insurance plans.
Maximum Levels of Change Allowed without EOI	Enter the maximum number of levels that employees can increase their coverage without requiring EOI. Used when you have a guaranteed issue level that changes by event type. Workday uses the smallest amount as the guaranteed issue if you populate 1 or more of these fields: • Guaranteed Issue Amount • Guaranteed Issue Multiplier • Maximum Amount of Change Allowed without EOI
Maximum Amount of Change Allowed without EOI	Enter the maximum amount that employees can increase their coverage without requiring EOI. Used when you have a guaranteed issue amount that changes by event type. Workday uses the smallest amount as the guaranteed issue if you populate 1 or more of these fields: • Guaranteed Issue Amount • Guaranteed Issue Multiplier • Maximum Amount of Change Allowed without EOI An employee must provide EOI if they elect more than the guaranteed issue amount.
Guaranteed Issue Amount	Enter the amount of insurance coverage that employees receive. Workday uses the smallest amount as the guaranteed issue if you populate 1 or more of these fields: • Guaranteed Issue Amount • Guaranteed Issue Multiplier • Maximum Amount of Change Allowed without EOI To enforce EOI for any change, enter a value of 1 or 0.01. Workday ignores a zero value for Guaranteed Issue Amount.
Guaranteed Issue Multiplier	Enter the salary multiplier used to calculate the amount of insurance coverage that employees receive. You can define the salary on the Salary Source field on these tasks: • Create Insurance Coverage • Edit Insurance Coverage

Option	Description
	Workday uses the smallest amount as the guaranteed issue if you populate 1 or more of these fields: • Guaranteed Issue Amount. • Guaranteed Issue Multiplier. • Maximum Amount of Change Allowed without EOI. Workday determines the salary definition for the salary multiplier from the insurance coverage. Example: You have an increment of salary plan (10,000 USD through 500,000 USD in multiples of 10,000). The employee can elect up to 4x salary without triggering EOI. Workday evaluates the insurance coverage amount to determine how to calculate the employee's salary.
Set Guaranteed Issue Rule	Select the rule that defines how to apply the guaranteed issue amount or multiplier when the value doesn't match the defined coverage levels. Define if the employee should automatically use the exact values for 1 of these amounts: • *Guaranteed Issue Amount* • *Closest Coverage Over* • *Closest Coverage Under* Select *Guaranteed Amount* if your benefit plan doesn't mix multipliers and coverage amounts. If your benefit plan mixes multipliers and coverage amounts, determine if the guaranteed issue should be the closest coverage value over or under the Guaranteed Issue Amount. Example: your benefit plan offers 70,000 – 80,000 - 90,000 – 100,000 – 110,000 – 120,000 with a Guaranteed Issue of 3x Salary. An employee has a salary of 35,000 USD and elects 120,000 USD during enrollment. They automatically have 110,000 USD while pending EOI if you define the guaranteed issue to be the *Closest Coverage Over*. If you define the guaranteed issue to be the *Closest Coverage Under*, they automatically have 100,000 USD while pending EOI. Note: This rule doesn't apply to the Maximum Amount Allowed. Example: If you define the maximum amount to be 95,000 USD, the newly eligible employee doesn't automatically have 95,000 USD.
Default Coverage if Pending EOI	Select the rule that defines the insurance coverage for the worker while EOI is pending.

Option	Description
	Define the automatic coverage if the employee elects over the Guaranteed Issue Amount with one of these options: • *Current Coverage Amount* • *Elected Coverage Amount* • *Guaranteed Issue Amount* If you select: • *Current Coverage Amount*, the coverage automatically uses the employee's last approved coverage amount. • *Elected Coverage Amount*, the coverage automatically uses the full amount elected during enrollment. • *Guaranteed Issue Amount*, the coverage automatically uses the Guaranteed Issue Amount defined for the enrollment event.

5. On the Levels of Change - Currently Waiving and Levels of Change - Newly Eligible tabs, set up the rules for processing insurance coverage.

   The rules apply when an employee has previously waived coverage or just became eligible for coverage. Examples: A new hire, a new benefit plan, or a staffing change that affects eligibility.

   As you complete this tab, consider:

Option	Description
Maximum Level Allowed	Enter the maximum level of insurance coverage that employees can elect during enrollment for this event type. Example: Your benefit plan offers 6 levels of coverage (2x, 3x, 4x, 5x, 6x, and 7x salary). If you enter 4 for the Maximum Level Allowed value, the employee can elect a level of coverage up to 5x their salary.
Maximum Amount Allowed	Enter the maximum amount of insurance coverage that employees can elect. Example: If you enter 450,000 and the benefit plan allows up to 600,000, during enrollment the employee can only elect up to 450,000 for this event type. Make sure that there's a coverage option for this amount, otherwise the employee can't select 450,000.
Include All Benefit Plans in Coverage Type for EOI	Select to use the combined total election for all benefit plans in a coverage type to determine when to require EOI. If selected, you must select it on all of the Levels of Change tabs. Note: Don't select auto-enrolled insurance plans.

Option	Description
Guaranteed Levels Without EOI	Enter the maximum number of levels that employees can elect without requiring EOI. Used when you have a guaranteed issue level that changes by event type.
Guaranteed Issue Amount	Enter the amount of insurance coverage that employees receive. Used when you have a guaranteed issue level that changes by event type. Enter this amount on all 3 Levels of Change tabs.
Guaranteed Issue Multiplier	Enter the salary multiplier used to calculate the amount of insurance coverage that employees receive. Define salary in the Salary Source field on the Create Insurance Coverage task. Workday determines the salary definition for the salary multiplier from the insurance coverage. Example: You have an increment of salary plan (10,000 USD through 500,000 USD in multiples of 10,000). The employee can elect up to 4x salary without triggering EOI. Workday evaluates the insurance coverage amount to determine how to calculate the employee's salary.
Set Guaranteed Issue Rule	Select the rule that defines how to apply the guaranteed issue amount or multiplier when the value doesn't match the defined coverage levels.
Default Coverage if Pending EOI	Select the rule that defines the insurance coverage for the worker while EOI is pending.

6. On the Coverage Rules tab, you can restrict the benefit plan and coverage target changes that employees can make during an enrollment event.

   Example: You can enable employees to add new dependents following a birth. However, you can prevent them from changing their medical plan or adding dependents other than the new child.

   You can define these restrictions as broadly or narrowly as you want, depending on your business requirements. Example: Apply the same restrictions to all members of a benefit group, regardless of the event and coverage type. Or, define restrictions that vary by event and coverage type.

   As you complete this tab, consider:

Option	Description
Allowed Benefit Plan Changes	• *Can Select Any Plan:* Select any plan included in the specified benefit coverage types, including the option to waive. Note: Workday can create a benefit event for a job change that doesn't qualify for selecting benefits. You might

Option	Description
	need to change this selection to a more restrictive choice if that occurs. • *Current Plan Only:* Change only the details of the benefit plans that have currently enrolled workers. Doesn't include the option to waive. Can add or remove dependents. • *Current Plan or Option to Decrease:* (Only Spending or HSA) Decrease contributions or keep at the current level. Doesn't allow increases. • *Current Plan or Option to Increase:* (Only Spending or HSA) Increase contributions or keep at the current level. Doesn't allow decreases. • *Current Plan or Option to Waive:* Change only the details of the benefit plans that have currently enrolled workers, including the option to waive. Can add or remove dependents. • *Only on Eligibility Change:* Change only if eligible for a new benefit plan or lost eligibility for a previously elected benefit plan. • *No Changes Allowed*
Allowed Dependent Changes	• *Additional Dependents Allowed:* Add or remove new dependents to the selected coverage types. Example: You can give newly married employees the option to add their spouse to their benefit plan. • *Continue with Current Dependents:* Hides the option to waive. Prevents workers from adding or removing dependents. Example: For certain staffing changes, enable employees to switch from an HMO to a PPO, but not to change their covered dependents. • *May Remove Dependents:* The employee can remove dependents from the selected coverage types. Doesn't allow increases. Example: For a life event such as a divorce, you can require employees to remove their spouse from their covered dependents.
Dependent Types	Required if you selected *Additional Dependents Allowed* or *May Remove Dependent* in the Allowed Dependent Changes field.

Option	Description

Defaulting Rules	For Health Care, Insurance, Additional Benefits, and Retirement Savings plans only.
	
	Select the rule that Workday uses to populate default benefit plans and elections into an employee's enrollment pages. In addition, Workday automatically applies the default plans selected by these rules to employees that fail to submit their benefit elections. Available options are:
	
	• *Default to Current Elections, Priority Coverage or Waive*.
	• *Default to Current Elections or Waive*.
	• *Default to Current Provider/Classification or Waive*.
	• *Default to Priority Coverage or Waive*.
	• *Default to Waive*.
	• *Reinstate Previous Elections, Priority Coverage or Waive*.
	• *Reinstate Previous Elections or Waive*.
	
	Workday attempts to apply each component in the selected option, in the order in which it displays, until one of them passes. If a component fails, Workday evaluates the next one. This process repeats until Workday can apply a component.
	
	• *Default to Current Elections:* If the employee is eligible for their current elections, then roll those elections forward. If a plan has an annual amount, the annual amount carries forward.
	• *Priority Coverage:* Assign the health care and insurance plans as defined in the Maintain Benefit Defaults task when, both:
	    • The employee has lost eligibility for their current elections.
	    • The employee hasn't waived their elections.
	• *Default to Current Provider and Classification:* If an employee and their dependents are eligible for their current plan, then roll the plan forward. If they become eligible for Medicare, move them to an equivalent Medicare plan. If they enrolled in a Medicare plan and lose eligibility, move them to an equivalent plan.
	• *Reinstate Previous Elections:* If the employee is eligible for their previous elections, then reinstate those elections.

Option	Description
	• *Waive:* Set the election to waive.

Next Steps

- View detailed information for a specific rule using the Enrollment Event Rule report.
- Link the event rule to one or more benefit groups using the Create Benefit Group task.

Related Information

Tasks

Steps: Set Up Enrollment Events and Rules on page 1341

Reference

Reference: Benefit Deduction Begin Date Rules on page 1367

Reference: Benefit Deduction End Date Rules on page 1369

Troubleshooting: Enrollment Events on page 1372

The Next Level: Troubleshooting Benefits

2022R2 What's New Post: Enrollment Event Rules for Coverage Begin Dates

Create Conditional Messages for Enrollment Events

Prerequisites

- Reference: Edit Tenant Setup - Business Processes
- Reference: Edit Tenant Setup - Notifications

Context

To create notification and confirmation messages that are specific to an event type, use condition rules. You can create a new rule or select an existing rule. Example: You can create notifications that are specific to a retirement event, so that only employees included in that event receive the notification.

Steps

1. Access the business process to which you want to add the notification or confirmation.

   Example: *Change Benefits for Life Event*.
2. Select Business Process > Add Notification from the related actions menu of the business process.
3. Specify the notification Effective as of date.
4. In the Triggers section, select 1 of these options:
   - Trigger on Status and *Completed* to send the notification or confirmation on enrollment completion.
   - On Entry and a specific step to send the notification or confirmation when the step is initiated.
   - On Exit and a specific step to send the notification or confirmation when the step is complete.
5. (Optional) In the Conditions and Rules section, select an existing rule.

   Add a row in the Conditions grid and select a rule.

6. (Optional) Create a new condition rule.
    a) In the Recipient section, select 1 or more recipients.
    b) Click OK.
    c) Click Create Condition Rule.
    d) Complete the Rule Conditions grid:

Option	Description
Source Class Report Field or Sub Rule	Select *Enrollment Type* in the Benefits Category folder.
Relational Operator	Select *In the selection list*.
Comparison Type	Select *Value specified in this filter*.
Comparison Value	Select the enrollment event type for which you're defining the notification/confirmation.

Related Information
Tasks
Steps: Set Up Enrollment Events and Rules on page 1341

Enrolling New Hires in Benefits

Context

The steps required to automate new hire enrollment vary depending on the roles to which you route enrollment tasks and the availability of employee self-service.

You can configure the *Hire* business process to support these routing options:

- Always route enrollment to a new hire (employee self-service is available to all employees).
- Always route enrollment to a Benefits Partner or Administrator (employee self-service isn't available).
- Route enrollment to some employees but not others (employee self-service is only available to some employees).

Steps

1. Add the *Create Workday Account* action to the *Hire* business process after the completion step.

   To always route enrollments to a new hire, set Optional to *No*. To route enrollments to some employees and not others based on condition rules, set Optional to *Yes*. To always route enrollments to a Benefits Partner or Administrator, set Optional to either *Yes* or *No*.
2. Add the *Change Benefit Elections* action to the *Hire* business process and set the value of Optional to *No*.

   Workday associates this action with the *If there is an effect on employee benefits?* condition rule, which determines whether an employee qualifies for benefits based on benefit group and benefit plan eligibility rules. If the condition is true, Workday can route the enrollment task to the employee.

   The *Change Benefit Elections* action should follow the *Create Workday Account* action, but doesn't need to follow it immediately. The best placement depends on all of these factors:

   - The condition rules associated with this action.
   - The benefit group.
   - The benefit plan eligibility rules used to determine benefit eligibility.

   Example: You create an eligibility rule that makes certain employees eligible for benefits based on their assigned compensation plan. The *Change Benefit Elections* action then follows the *Propose*

Compensation action in the business process. Otherwise, Workday can't determine whether an employee qualifies for benefits based on compensation data.

3. (Optional) To route enrollments to some employees but not others, use 2 instances of the *Change Benefit Elections* action. Create separate condition rules for each set of employees:
   a) Add these additional condition rules to the *Change Benefit Elections* action:
      - *Worker has Workday Account*.

        If this rule resolves to *True* and other condition rules are satisfied, Workday routes the enrollment task to the employee. Create this condition rule yourself.
      - Other condition rules required to route the enrollment task to the appropriate employees.

        Employees might need a valid Workday account along with additional conditions to have the enrollment task routed to them. You can define additional condition rules and add them to the *Change Benefit Elections* action.

        Example: Only salaried employees with valid accounts or employees in certain geographical areas can enter their own benefit elections. In this case, add additional rules and conditions to the *Change Benefit Elections* step to control which workers can enroll in benefits.
   b) Add the second instance of the *Change Benefit Elections* action immediately after the first. Use the same processing order:
      - *Worker does **not** have Workday Account* OR worker doesn't meet additional conditions specified in step 4.

        This multipart rule uses OR logic that includes the rule *Worker does **not** have Workday Account*. This rule determines if the new employee doesn't have a Workday account. If the rule resolves to *True OR* the additional conditions aren't met, Workday routes the enrollment task to the Benefits Partner or Administrator.

        Define the *Worker does **not** have Workday Account* condition and any other conditions you want to include in this multipart rule.
4. Assign the *Change Benefit Elections* action to a role. Examples: *Employee*, or *Benefits Partner* or *Benefits Administrator*.

   The role determines where Workday routes the enrollment task.

Related Information
Tasks
Steps: Set Up Enrollment Events and Rules on page 1341
Create Business Process Condition Rules
Reference
Troubleshooting: Enrollment Events on page 1372

Discontinue Benefits on Termination

Prerequisites

Configure the *~Termination~* business process.

Context

You can automate the termination of benefits when you terminate an employee by adding the *Change Benefit Elections* action to the *Termination* business process.

Steps

1. Access the *Termination* business process, and from the related actions menu, select Edit Definition.

2. Add the *Change Benefit Elections* action and set the value of Optional to *No*.

   When you add this action to the *Termination* business process, Workday automatically associates the action with the *If there is an effect on employee benefits?* condition rule. This delivered rule determines whether a termination results in a loss of benefits based on both:

   - Benefit group.
   - Benefit plan eligibility rules.

   If so, Workday can route the benefit termination task directly to a Benefits Partner or Administrator.

   Note: In general, add actions and associated condition rules after steps that provide data or information evaluated by these rules.
3. Assign the *Change Benefit Elections* action to the *Benefits Partner*, *Benefits Administrator*, or other approved role.

   Workday routes an enrollment task to this role only if the termination event requires the Benefits Partner or Administrator to make an election on behalf of the employee.

Related Information

Concepts

Concept: Termination Impact on page 710

Tasks

Steps: Set Up Termination on page 697

Terminate Employees on page 699

Concept: Enrollment Period for Benefit Events

You can define the benefit enrollment period for a specific type of benefit event. You can also restrict an employee's ability to report that benefit event after the enrollment period has expired.

When an employee reports a benefit event using Change Benefits, Workday uses the Days to Enroll Calculation field to determine if the start date begins on:

- The event date.
- The date the employee reports the event.

Workday adds the value entered in the Days to Enroll field to that date. This new date is the employee's Submit Elections By date.

Note: Workday only respects the value of Days to Enroll if the worker initiates a benefit enrollment event with the Change Benefits task. Workday recommends that you create a validation on the *Dependent Event* business process to enforce Days to Enroll. This validation is for when the worker initiates the Add Dependent task.

```
Days to Enroll Calculation (Event or Initiate Date) + Days to Enroll = Submit
Elections By
```

If you select the Employee Cannot Report After Days to Enroll check box and the date passes, the employee receives an error message and can’t proceed. You can use the Change Benefits task to report the benefit event on behalf of the employee. Workday uses the system date as the basis for calculating the enrollment period.

Note: Workday provides the Submit Elections By field as a guideline for employees to submit an event, but doesn’t enforce this date. Employees that start the benefit enrollment before the Submit Elections By date can submit benefit elections after the date, until you finalize the enrollment event.

Related Information

Tasks

Steps: Set Up Enrollment Events and Rules on page 1341

Concept: Coordination of Benefits Enrollment Events

Coordination of events ensures that Workday:

- Processes potentially conflicting events in the correct event date order.
- Preserves existing enrollments, when possible.

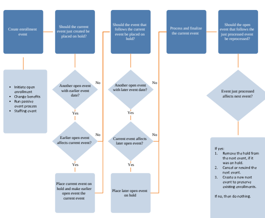
Coordination of events occurs after you initiate an open enrollment, change benefits, or run the passive event process. Workday attempts to process 1 event at a time in event date priority. The event date for:

- Open enrollment = the date entered on the Initiate Open Enrollment task.
- Life events (excluding passive events) = the date entered on the Change Benefits task.
- Passive events = the date when the scheduled passive event runs.

Note: Except for open enrollment events, if more than 1 benefit event occurs on the same day, Workday consolidates those events into 1 hybrid event.

You can enable coordination of events between web service events and future-dated events created in Workday. Select Enable Coordination of Events for the Change Benefits Web Service in the Benefits section of the Edit Tenant Setup - HCM task. When selected, Workday reprocesses eligible future-dated events when the web service creates earlier-dated events.

The coordination of events process compares 2 events at a time:



For an event to affect another event, one of these situations must occur:

- A change in eligibility: Loss or gain in coverage or a change in benefit group.

  Always reprocess an event when a change in eligibility occurs.
- An overlap in coverage types between the 2 events.

  Example: If Event A has health, dental, and vision, and Event B has health and insurance, there’s an overlap in health. Reprocess an event only when coverage types overlap.
- The Do Not Reprocess option is selected on the enrollment event.

  Workday doesn't place a new event on hold when comparing a new event (Do Not Reprocess selected) to an older open event. Workday processes both events together.

  Workday reprocesses the next event when comparing a new event to an older event (Do Not Reprocess selected).
- The Do Not Reprocess Future Events option is selected on the enrollment event.

  If Workday compares a just processed event (Do Not Reprocess Future Events selected) to a later event, Workday doesn't place the later event on hold. Workday processes both events together.

  If Workday compares a just processed event to a later event (Do Not Reprocess Future Events selected), Workday reprocesses the later event.

When you cancel or rescind the next event and create a new event, Workday sets the new event date to the date of the canceled event. To calculate the Submit By date, Workday adds the value in the Days to Enroll for Coordination of Events field to the creation date of the new event. For the new event, Workday bases any evidence of insurability on the current benefit elections.

Concept: Multiple Benefit Events on the Same Day

If a worker has more than 1 benefit event reported on the same day, Workday combines them into a consolidated (hybrid) benefit event. Workday can consolidate benefit, staffing, and passive events. The hybrid benefit event includes the most generous options available from all events and preserves any completed elections made up to that time.

This consolidation doesn't include events that coincide with open enrollment, or the Change Retirement Savings task that coincides with a benefit event. If Workday creates an open enrollment event before a benefit, staffing or passive event, then it must enter the nonopen enrollment events on another day. If Workday creates a life event before an open enrollment event, Workday automatically cancels or rescinds the life event. If a stand-alone Change Retirement Savings event and a benefit event include the same coverage types for retirement savings, they can't occur on the same day.

Examples:

- A worker reports the birth of a child on April 1. Workday creates a benefit event for the birth. That same day, the worker's manager submits a promotion for the worker. Workday cancels or rescinds the benefit event for the birth and creates a hybrid benefit event.
- A worker reports the birth of a child on April 1. Workday creates a benefit event for the birth. That same day, the worker's manager submits a promotion for the worker. The promotion requires an approval. If approved, Workday cancels or rescinds the benefit event for the birth and creates a hybrid benefit event. If denied, Workday doesn't create a hybrid benefit event and the benefit event for the birth remains intact.

  If one of the benefit events that make up the hybrid benefit event becomes invalid, you can either:

  - To support the remaining valid event, cancel or rescind the hybrid event and create a new event.
  - Use the Benefit Election History and select Full Process Record as a related action off the event. Select the Overall Process event link to cancel or rescind the appropriate event.

This table lists the priority Workday follows to provide the most generous options when creating the hybrid enrollment events:

Task	Option	Priority	Description
Maintain Enrollment Event Types	Route to Benefits Partner	1	Yes
		2	No
Create Enrollment Event Rule > Start or Waive Coverage	Coverage Begin Date	1	On the event date.
		2	First of the month on or after the event date.
		3	First of the month following the event date.
	Waiting Period	Always honor the waiting period, unless you select Ignore Waiting Periods.	
Create Enrollment Event Rule > Loss of Coverage	Coverage End Date	1	Last day of the month.
		2	On the half month.
		3	On the event date
	Grace Period	Same priority as Coverage End Date, but also using the least number of days as the grace period.	

Task	Option	Priority	Description
Create Enrollment Event Rule > Levels of Change	Maximum Level of Change Allowed	Always take the highest level across all events.	
	• Maximum Levels of Change Allowed without EOI	Always take the highest GI amount across all events.	
	• Guaranteed Issue (EOI required above this level)		
	• Maximum Amount of Change Allowed without EOI	Always take the highest GI amount across all events.	
	• Guaranteed Issue (EOI required above this amount of coverage)		
	Default Coverage if Pending EOI	1	Elected Coverage Amount.
		2	Current Coverage Amount.
		3	Guaranteed Issue Amount.
Create Enrollment Event Rule > Coverage Rules	Allowed Benefit Plan Changes	1	Can select any plan.
		2	Current plan or option to waive.
		3	Current plan only
		4	Current plan or option to increase.
		5	Current plan or option to decrease.
		6	Only on eligibility change.
		7	Only on beneficiary changes.
		8	No changes permitted.
	Allowed Dependent Changes	1	Additional dependents permitted.
		2	Can remove dependents.
		3	Continue with current dependents.
	Dependent Types	Include all coverage targets across all events.	
	Defaulting Rules	1	Default to current elections, priority coverage or waive.
		2	Default to current elections or waive.
		3	Default to priority coverage or waive.
		4	Default to waive

The consolidated event displays as 1 entry on the Benefit Election History. The entry lists both events in the Enrollment Event Type column.

If you're automating benefit eligibility checks, you must have enrollment event types and rules that correspond to life, staffing, and passive events.

Related Information

Tasks

Steps: Set Up Enrollment Events and Rules on page 1341

Concept: Plan Changes and Waiting Periods

Benefit plans can have a waiting period that the employee must complete before receiving benefits. If the employee has an event that requires a change in plans, the new plan might have a different waiting period.

If the employee doesn't complete the waiting period before a plan change, Workday:

- Enforces the waiting period associated with the new plan.
- Credits the employee for any time spent waiting for the old plan to take effect.
- Uses the initial waiting period start date as the start date of the second waiting period.

  Example: The first waiting period begins on June 30, so the new plan uses the same June 30 start date for the waiting period.

If an employee completes their initial waiting period in a benefit group and moves to another benefit group, Workday waives the waiting period for the second group.

Employee Completes Waiting Period for One Plan Before Selecting a Different Plan

Bob begins at his new company on March 1 and elects medical and dental coverage. The plans have these waiting periods:

- Medical: 1 month (coverage begins April 1).
- Dental: 1 month (coverage begins April 1).

Then Bob goes through a second enrollment event on April 15.

Second Enrollment	Effect
Bob moves to a new benefit group and selects new medical and dental plans, each with 3 month waiting periods.	Coverage begins: • Medical: April 15 • Dental: April 15 Workday waives the waiting period for new coverage because Bob has completed the initial 1 month waiting period. When an employee satisfies a plan waiting period requirement and later elects a new plan of the same type, Workday waives waiting period requirements for the second plan. If the employee loses benefits due to a leave of absence, a reduction in work hours, or other change, Workday restarts the waiting period.

Employee Changes From One Plan to Another Before Completing the Initial Waiting Period

Federico begins working at his new company on March 1 and elects medical and dental coverage. The plans have these waiting periods:

- Medical Coverage: 3 months (coverage begins June 1).
- Dental Coverage: 4 months (coverage begins July 1).

Federico goes through a second enrollment event on April 15, before the waiting period completes. Depending on the plan changes, his coverage can begin on different dates.

Second Enrollment (April 15)	Effect
Federico moves to another state and elects to keep the same plans.	Coverage begins: • Medical: June 1 • Dental: July 1 Because the plans don't change, coverage still begins on the same dates.
Federico moves to another state and selects new medical and dental plans with the same waiting periods.	Coverage begins: • Medical: June 1 • Dental: July 1 Workday enforces the new waiting periods, but because the new periods are identical to the old, the begin dates remain the same.
Federico receives a promotion and selects new medical and dental plans. They've 2 and 3 month waiting periods, respectively.	Coverage begins: • Medical: May 1 • Dental: June 1 Workday enforces the new waiting periods, but credits Federico for time spent waiting under the old plans.
Federico receives a demotion and selects new medical and dental plans. They've 4 and 5 month waiting periods, respectively.	Coverage begins: • Medical: July 1 • Dental: August 1 Workday enforces the new waiting periods, but credits Federico for time spent waiting for the old plans to take effect.
Federico moves to a new benefit group and selects new medical and dental plans with 1 and 2 month waiting periods, respectively.	Coverage begins: • Medical: April 15 • Dental: May 1 Workday enforces the new waiting periods, but credits Federico for time spent waiting for the old plans to take effect. In this case, the waiting period for the new medical plan (1 month) is over by the time the second enrollment event takes place (April 15). Therefore, Workday begins medical coverage on April 15.

Related Information

Tasks

Steps: Set Up Enrollment Events and Rules on page 1341

Reference: Benefit Deduction Begin Date Rules

When developing the rules for events that begin benefit coverage and deductions, consider how the coverage begin date can impact the deduction begin date. The deduction begin date rule determines the first pay period in which the deduction occurs. Sometimes, the rule depends on the coverage begin date. When using the Workday delivered rules, consider how the coverage begin date impacts the deduction begin date.

Example: Betty Liu creates enrollment event rules determined from coverage begin date and deduction begin date. She uses these dates and rules.

Dates:

- First Date of Employment: 7/1.
- Event Date: 7/2.
- Pay Periods and Pay Dates:
    - Period: 5/27- 6/10 Pay Date: 6/15
    - Period: 6/13 - 6/26 Pay Date: 7/1
    - Period: 6/27 - 7/10 Pay Date: 7/15
    - Period: 7/11 - 7/26 Pay Date: 8/1
    - Period: 7/27 - 8/10 Pay Date: 8/15
    - Period: 8/11 - 8/27 Pay Date: 9/1

Rules:

- Coverage Begin Date rule: *On Event Date*.
- Deduction Begin Date rule: *On Coverage Begin Date*.

The deduction begin date uses the coverage begin date value, which uses the event date. With the event date of 7/2, the deduction begin date is 7/2 and falls in the 6/27 - 7/10 pay period. The first pay date in which the deduction begins is 7/15. The pay dates occur on the 1st and 15th of each month.

This table displays the possible pay dates based on different coverage begin date and deduction begin date rules, where:

- CBD: Coverage Begin Date.
- DBD: Deduction Begin Date.

Deduction Begin Date Rules	Date	Coverage Begin Date Rules					
		First of Month Following Event Date	First of Month on or After Event Date	First of Month on or After the Later of Event or Submission Date	On Event Date	On Pay Period Beginning After Event Date	On Pay Period Begin On or After the Later of Event or Submission Date
First of Month On or After Event Date	CBD	8/1	8/1	8/1	7/2	7/11	7/11
	DBD	8/1	8/1	8/1	8/1	8/1	8/1
	Pay Date	8/15	8/15	8/15	8/15	8/15	8/15
On CBD	CBD	8/1	8/1	8/1	7/2	7/11	7/11
	DBD	8/1	8/1	8/1	7/2	7/11	7/11
	Pay Date	8/15	8/15	8/15	7/15	8/1	8/1
On Event Date	CBD	8/1	8/1	8/1	7/2	7/11	7/11
	DBD	7/2	7/2	7/2	7/2	7/2	7/2
	Pay Date	7/15	7/15	7/15	7/15	7/15	7/15
Pay Period Before CBD	CBD	8/1	8/1	8/1	7/2	7/11	7/11
	DBD	7/11	7/11	7/11	6/13	6/27	6/27
	Pay Date	8/1	8/1	8/1	7/1	7/15	7/15
Pay Period Before Event Date	CBD	8/1	8/1	8/1	7/2	7/11	7/11
	DBD	6/13	6/13	6/13	6/13	6/13	6/13
	Pay Date	7/1	7/1	7/1	7/1	7/1	7/1

Deduction Begin Date Rules	Date	Coverage Begin Date Rules					
		First of Month Following Event Date	First of Month on or After Event Date	First of Month on or After the Later of Event or Submission Date	On Event Date	On Pay Period Beginning After Event Date	On Pay Period Begin On or After the Later of Event or Submission Date
Pay Period Containing CBD	CBD	8/1	8/1	8/1	7/2	7/11	7/11
	DBD	7/11	7/11	7/11	6/27	7/11	7/11
	Pay Date	8/1	8/1	8/1	7/15	8/1	8/1
Pay Period Containing Event Date	CBD	8/1	8/1	8/1	7/2	7/11	7/11
	DBD	6/27	6/27	6/27	6/27	6/27	6/27
	Pay Date	7/15	7/15	7/15	7/15	7/15	7/15
Pay Period Following CBD	CBD	8/1	8/1	8/1	7/2	7/11	7/11
	DBD	7/27	7/27	7/27	7/11	7/27	7/27
	Pay Date	8/15	8/15	8/15	8/1	8/15	8/15
Pay Period Following Event Date	CBD	8/1	8/1	8/1	7/2	7/11	7/11
	DBD	7/11	7/11	7/11	7/11	7/11	7/11
	Pay Date	8/1	8/1	8/1	8/1	8/1	8/1
Two Pay Periods Before CBD	CBD	8/1	8/1	8/1	7/2	7/11	7/11
	DBD	6/27	6/27	6/27	5/27	6/13	6/13
	Pay Date	7/15	7/15	7/15	6/15	7/1	7/1

Related Information

Tasks

Create Enrollment Event Rules on page 1349

Reference: Benefit Deduction End Date Rules

The coverage end date can impact the deduction end date in event rules that terminate benefit coverage and deductions. The rule for the deduction end date determines the pay period in which the deduction ends. This rule can reference the coverage end date.

Example: Betty Liu creates enrollment event rules using the coverage end and deduction end date. She uses these dates and rules:

Dates:

- Event Date: 7/16
- Pay Periods and Pay Dates:
  - Period: 6/27 - 7/10   Pay Date: 7/15
  - Period: 7/11 - 7/26   Pay Date: 8/1
  - Period: 7/27 - 8/10   Pay Date: 8/15
  - Period: 8/11 - 8/27   Pay Date: 9/1

Rules:

- Coverage End Date rule: *On Event Date*.
- Deduction End Date rule: *End of the Month Containing Event Date*.

The deduction end date uses the end of the month in which the event date occurs. With the event date of 7/16, the deduction end date is 7/31 and falls in the next pay period. The pay date in which the deduction no longer occurs is 8/15.

This table displays the possible pay dates based on different rules for coverage end date and deduction end dates, where:

- CED: Coverage End Date.
- DED: Deduction End Date.

Deduction End Date Rules	Date	Coverage End Date Rules				
		Last Day of the Month	On Pay Period Begin After Event Date	On the Event Date	On the Half Month	Pay Period End on or After Event Date
End of the Month Containing Event Date	CED	7/31	7/27	7/16	7/31	8/15
	DED	7/31	7/31	7/31	7/31	7/31
	Pay Date	8/15	8/15	8/15	8/15	8/15
On Coverage End Date	CED	7/31	7/27	7/16	7/31	7/26
	DED	7/31	7/27	7/16	7/31	7/26
	Pay Date	8/15	8/15	8/1	8/15	8/1
On Event Date	CED	7/31	7/27	7/16	7/31	7/26
	DED	7/16	7/16	7/16	7/16	7/16
	Pay Date	8/1	8/1	8/1	8/1	8/1
Pay Period Before Coverage End Date	CED	7/31	7/27	7/16	7/31	7/26
	DED	7/26	7/26	7/10	7/26	7/10
	Pay Date	8/1	8/1	7/15	8/1	7/15
Pay Period Before Event Date	CED	7/31	7/27	7/16	7/31	7/26
	DED	7/10	7/10	7/10	7/10	7/10
	Pay Date	7/15	7/15	7/15	7/15	7/15
Pay Period Containing Coverage End Date	CED	7/31	7/27	7/16	7/31	7/26
	DED	8/10	8/10	7/26	8/10	7/26
	Pay Date	8/15	8/15	8/1	8/15	8/1
Pay Period Containing Event Date	CED	7/31	7/27	7/16	7/31	7/26
	DED	7/26	7/26	7/26	7/26	7/26
	Pay Date	8/1	8/1	8/1	8/1	8/1
Pay Period Following Coverage End Date	CED	7/31	7/27	7/16	7/31	7/26
	DED	8/27	8/27	8/10	8/27	8/10
	Pay Date	9/1	9/1	8/15	9/1	8/15
Pay Period Following Event Date	CED	7/31	7/27	7/16	7/31	7/26
	DED	8/10	8/10	8/10	8/10	8/10
	Pay Date	8/15	8/15	8/15	8/15	8/15

Related Information

Tasks

Create Enrollment Event Rules on page 1349

Example: Coordination of Benefits Events

Context

These common scenarios demonstrate how coordination of events works. These examples assume:

- You enter the events with the later event date first.

  Example: You enter the promotion before the beneficiary change.
- No overlap occurs in coverage types between the events.

  Example: If Promotion includes Health, and Beneficiary Change includes Insurance, there's no overlap in coverage types.
- There's no loss or gain in coverage eligibility.

If there's an overlap in coverage types or a loss or gain in eligibility, Workday always places the later event on hold. Workday reprocesses the later event after the earlier event completes.

An employee has these benefit enrollment events in the current year.

Date	Event
January 1	Open Enrollment (Completed)
April 1	Marriage
May 1	Beneficiary Change
September 1	Promotion
January 1 (next year)	Open Enrollment (In Progress)

Workday processes the events as shown:

Events	Don't Reprocess	Don't Reprocess Future Event	Result
Open Enrollment (In Progress) and the Promotion.	Open Enrollment = Clear Promotion = Clear	Open Enrollment = Clear Promotion = Clear	Both events process at the same time.
Open Enrollment (In Progress) and the Promotion.	Open Enrollment = Selected Promotion = Clear	Open Enrollment = Clear Promotion = Selected	Both events process at the same time.
Promotion is entered and completed before the Beneficiary Change.	Promotion = Clear Beneficiary Change = Clear	Promotion = Clear Beneficiary Change = Clear	Promotion stays completed and the beneficiary change completes as normal.
Promotion is entered and in progress before the Beneficiary Change.	Promotion = Selected Beneficiary Change = Clear	Promotion = Clear Beneficiary Change = Selected	Both events process at the same time.
Beneficiary Change is entered and in progress after the completed Open Enrollment.	Beneficiary Change = Clear Open Enrollment = Selected	Beneficiary Change = Selected Open Enrollment = Clear	Open Enrollment stays completed and the beneficiary change completes as normal.

Related Information

Tasks

Steps: Set Up Enrollment Events and Rules on page 1341

Troubleshooting: Coordination of Events and Changed Retirement Savings Elections

Changes to retirement savings elections for future-dated open enrollment or life events are missing.

Example: A worker has a contribution amount of 5 percent for a pension plan, effective January 1. On December 5, the worker changes the contribution to 10 percent. On January 1, the contribution reverts to 5 percent.

Cause: Changes to elections using the default event type for retirement savings (configured in Edit Tenant Setup - HCM) don't participate in coordination of benefit events.

Solution: Don't include retirement savings plan types in your benefit plan year definition for open enrollment. Instead, create an ongoing benefit plan year with the retirement savings plan types.

If Workday processes earlier-dated retirement savings elections after later-dated termination events, audit these situations and update the termination event as needed.

Related Information

Concepts

Concept: Coordination of Benefits Enrollment Events on page 1363

Tasks

Change Retirement Savings Elections on page 1434
Create Benefit Plan Year Definitions on page 1418

Troubleshooting: Enrollment Events

Workday doesn't create a benefit event for a qualifying job change.

Cause	Solution
You didn't configure the *Change Benefit Elections* step on the *Change Job* business process.	Edit Business Processes Add the *Change Benefit Elections* step.
Workday doesn't reach the completion step on the *Change Job* business process before evaluating the *Change Benefit Elections* step. Example: You might have a condition rule on an approval step that serves as the completion step. If the condition causes Workday to bypass the completion step, it can prevent Workday from evaluating the Change Benefit Elections step.	Edit Business Processes. Add a step that runs between the completion step and the *Change Benefit Elections* step. Example: Add a report.
You've added a custom condition rule to the *Change Benefit Elections* step that might be preventing Workday from creating the benefit event.	Create Business Process Condition Rules. Test the custom conditional rule by removing or revising it to determine if it prevents Workday from creating the benefit event.
Other steps in the business process block the benefit election step.	Security: *Worker Data: Historical Staffing Information* domain in the Staffing functional area. Access the View Worker History report to determine if another step, like an approval, is blocking the progress of the event.
You need to add the *Change Job* benefit event row in the event type of the benefit enrollment.	Security: *Set Up: Benefits* domain in the Benefits functional area. 1. Access the Maintain Enrollment Event Types report. 2. Select the event type of the job change.

Cause	Solution
	3. Add a row in the Events and Reasons grid and select *Change Job*.
The benefit event for the job change has reason restrictions, but the reason for the worker's job change isn't in the Restricted by Reason list.	Security: *Set Up: Benefits* domain in the Benefits functional area. 1. Access the Maintain Enrollment Event Types report. 2. Select the enrollment event type for the change job. 3. Do 1 of these actions: • Select the missing reason from the Restricted by Reason prompt in the Events and Reasons grid. • Unless you have different events for job changes, remove all of the reason restrictions.
There's a missing benefit coverage type on the benefit event type.	Security: *Set Up: Benefits* domain in the Benefits functional area. 1. Access the Edit Benefit Event Type task. 2. Select the missing coverage type from the Enrollment Offering Type prompt.
There are missing benefit coverage types on the coverage rule for the enrollment event rule.	Security: *Set Up: Benefits* domain in the Benefits functional area. 1. Access the Edit Enrollment Event Rule task. 2. On the Coverage Rules tab, add the missing benefit coverage types.

Workday creates a benefit event for a job change that doesn't qualify for selecting benefits.

Cause	Solution
Workday doesn't have a record that the employee waived coverage because: • The benefit type for the job change includes a coverage type that you haven't previously offered the worker through Workday. • Workday didn't load waive records when you imported benefits from a third-party vendor.	Ensure that Workday generates the waive record for the worker's benefit enrollment event. 1. Access the Edit Benefit Event Type task. a. Add all hire event coverage types for the benefit event of the job change. b. Add needed coverage types, or remove any unneeded ones, from the benefit event for the job change. Security: *Set Up: Benefits* domain in the Benefits functional area.

Cause	Solution
	2. Access the Create Passive Event Rule task. Configure a passive event rule that enrolls or waives the worker in the benefit plan when the worker becomes either: • Hired. • Eligible for benefits. Security: *Set Up: Benefits* domain in the Benefits functional area.
You selected the *Can select any plan* option on the coverage rule.	Security: *Set Up: Benefits* domain in the Benefits functional area. 1. Access the Edit Enrollment Event Rule task. 2. On the Coverage Rules tab, select *Only on Eligibility Change* from the Allowed Benefit Plan Changes prompt.

Related Information

Concepts

Setup Considerations: Job Changes on page 838

Tasks

Steps: Set Up Job Changes on page 844
Manage Benefit Coverage Types on page 1243
Set Up Reasons for Job Changes on page 857
Transfer, Promote, or Change Job on page 821

Default Coverage and Auto-Enrollment

Steps: Set Up Auto-Contribution Increase for Retirement Plans

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

The U.S. Federal Secure Act 2.0 requires organizations to enable workers to automatically increase their retirement savings contributions each year. You can set up auto-escalation for percentage contributions for retirement plans in Workday. Using passive events, you can enroll and enable new and existing workers. Workers can opt-out of the automatic increases during an enrollment event.

For a use case related to this topic, see ../../../use-case-library/use-case--set-up-auto-escalation-for-contribution-to-retirement-savings-plans.dita in the Use Case Library.

Steps

1. Configure auto-contribution increases for retirement plans by creating or updating retirement savings plans in Workday and specifying the auto-contribution increase percentages. See: Create Retirement Savings Plans on page 1302.
2. Enroll Workers into Retirement Savings Plans with Default Contribution Increases on page 1375
3. Add Opt Ins for Contribution Increases to Existing Retirement Savings Elections on page 1377

4. Increase Retirement Savings Contributions Annually for Workers Opted into Automatic Contribution Increases on page 1379.

Result

After running the passive event rule, workers receive a benefit event that brings forward their existing retirement savings contributions. Workers can also opt out of the auto-increase by unselecting the Auto Contribution Increase in the benefit event.

Example

Next Steps

Enroll Workers into Retirement Savings Plans with Default Contribution Increases

Prerequisites

- Create a retirement savings plan and enable the Auto Contribution Increase check box. See Create Retirement Savings Plans on page 1302.
- Security: *Set Up: Benefits* domain in the Benefits functional area.

Context

When managing retirement savings elections in Workday, you can create a passive event rule to enroll workers in the retirement savings plan at the default percentage.

This configuration also enables workers to:

- Waive the default contribution.
- Change the default contribution
- Opt out of the auto-increase.

Note: Ensure that you communicate with your workers about this event and what they need to do to waive or change the default contribution, or opt out of the auto-increase.

Steps

1. Create a benefit event type for the passive event rule.
   a) Access the Create Benefit Event Type task.
   b) Enter a name for the new benefit event type.

      You can prefix the name with *PASSIVE* to easily identify the purpose of the event.
   c) Select the applicable coverage types in the Enrollment Offering Type field.
   d) Select the number of days you want to allow workers to enroll in the Days to Enroll field.

      Once this date passes, run the Finalize Open Benefit Events process to finalize any events the workers did not submit.
   e) Click OK.
2. Create a benefit eligibility rule for the passive event rule.
   a) Access the Create Benefit Eligibility Rule task.
   b) Select Benefit Plan Eligibility Rule and click OK.
   c) Create a rule that identifies the workers that you want to enroll in the retirement savings plan at a default contribution. See Create Benefit Eligibility Rules on page 1255.

      Because you assign the passive event rule to benefit groups with a benefit group eligibility rule, you don't have to replicate the eligibility.

3. Create the passive event rule.
    a) Access the Create Passive Event rule.
    b) Enter a name.
    c) Select the benefit event type and benefit eligibility rule that you created.
    d) Select the benefit groups that are applicable to the rule and click OK.
4. Configure the benefit default.
    a) Access the Maintain Benefit Defaults task.
    b) Add the defaulting information for the relevant benefit groups and plans in the Retirement Savings tab.
    c) In the Employee Contribution Percentage field, enter the percentage at which you want to enroll new participants.
    d) Click OK.
5. Update the enrollment event rule.
    a) Access the Edit Enrollment Event Rule task for the relevant enrollment rule.
    b) On the Start or Waive Coverage tab, add a row for the passive benefit event.
    c) Enter values for the Benefit Coverage Type field, the Coverage Begin Date field, and the Deduction Begin Date field.
    d) On the Coverage Rules tab, add a row for the passive benefit event.
    e) Select a value for the Benefit Coverage Type field. Select *Can Select Any Plan* for the Allowed Benefit Plan Changes field if you are routing the event to the worker to take action or *No changes allowed* if you want the election to finalize automatically with no action from the worker. Select *Default to Priority Coverage or Waive* for the Defaulting Rules field.
6. Schedule the passive event rule.
    a) Access the Schedule Passive Events task.
    b) Select the run frequency you want and click OK.
    c) Enter a Request Name and select the Passive Event Rule you want to schedule.
    d) Set up the date and time parameters on the Schedule tab and click OK.

Result

Once the passive event schedule runs, the rule enrolls workers in the retirement savings plan at the default percentage. Workers will also have the option to waive the default contribution, change the default contribution, or opt out of the auto-increase.

Example

Next Steps

Related Information
Tasks
Create Enrollment Events on page 1343
Create Enrollment Event Rules on page 1349
Create Rules for Allocating Retirement Savings Contributions on page 1304
Create Passive Event Rules on page 1443
Schedule Passive Events on page 1445

Enroll Workers into Retirement Savings Plans Managed by Third-Party Providers

Prerequisites

- Security: *Set Up: Benefits* domain in the Benefits functional area.

Context

When managing retirement savings elections outside of Workday, you can create a placeholder retirement savings plan in Workday to enroll newly eligible workers at a default contribution. After workers enroll in the placeholder savings plan, you can then send demographic and eligibility information to the third-party provider. You can also third-party providers the default contribution amount.

If you already have a passive event rule that enrolls workers in the retirement savings plan at 0%, you need to create a benefit default to enroll them at a default amount, such as 3%. After creating the benefit default, update the defaulting rules for the event to an option that references priority coverage.

Steps

1. Configure a benefit default.
    a) Access the Maintain Benefit Default task.
    b) Add the defaulting information for the relevant benefit groups and plans in the Retirement Savings tab.
    c) Enter the percentage that you want to enroll new participants in the Employee Contribution Percentage field.
    d) Click OK.
2. Update the enrollment event rule.
    a) Access the Edit Enrollment Event Rule task for the relevant enrollment events rules.
    b) Locate the benefit event that you use for the passive event rule to enroll workers into retirement savings in the Coverage Rules tab.
    c) Ensure that the Allowed Benefit Plan Changes field has a value of *No Changes Allowed*.
    d) Select *Default to Priority Coverage or Waive* in the Defaulting Rules field for that event.
3. Run the passive event rule as you would normally.

Related Information
Tasks
Set Up Default Benefits Coverage on page 1379
Create Enrollment Event Rules on page 1349
Create Passive Event Rules on page 1443

Add Opt Ins for Contribution Increases to Existing Retirement Savings Elections

Prerequisites

- Create a retirement savings plan and enable the Auto Contribution Increase check box. See Create Retirement Savings Plans on page 1302.
- Security: *Set Up: Benefits* domain in the Benefits functional area.

Context

When managing retirement savings elections in Workday, you can create a passive event rule that sends a benefit event to workers. The benefit event will then bring forward their existing contributions with the Auto Contribution Increase check box selected. Workers can clear that check box during the benefit event. If workers don't make any changes, Workday flags their elections for auto-contribution increases when you finalize these benefit events.

Because this configuration updates all existing enrollments to comply with the Secure Act 2.0, you should only run this passive event rule one time.

Note: Ensure that you communicate with your workers about this event and what they need to do to opt out of the auto-increase.

Steps

1. Create a benefit event type for the passive event rules.
    a) Access the Create Benefit Event Type task.
    b) Enter a name for the new benefit event type.
    c) Select the applicable coverage types in the Enrollment Offering Type field.
    d) Select the number of days you want to allow workers to enroll in the Days to Enroll field.

       Once this date passes, run the Finalize Open Benefit Events process to finalize any events the workers didn't submit.
    e) Click OK.
2. Create a benefit eligibility rule for the passive event rule.
    a) Access the Create Benefit Eligibility Rule task.
    b) Select Benefit Plan Eligibility Rule and click OK.
    c) Create a rule that identifies the workers who are already enrolled in the retirement savings plan. See Create Benefit Eligibility Rules on page 1255.

       Because you assign the passive event rule to a benefit group, you don't have to replicate the benefit group eligibility in the passive event eligibility rule
3. Create the passive event rule.
    a) Access the Create Passive Event rule.
    b) Enter a name.
    c) Select the benefit event type and benefit eligibility rule that you created.
    d) Select the benefit groups that are applicable to the rule and click OK.
4. Update the enrollment event rule.
    a) Access the Edit Enrollment Event Rule task for the relevant enrollment rule.
    b) On the Start or Waive Coverage tab, add a row for the passive benefit event.
    c) Enter values for the Benefit Coverage Type field, the Coverage Begin Date field, and the Deduction Begin Date field.
    d) On the Coverage Rules tab, add a row for the passive benefit event.
    e) Select a value for the Benefit Coverage Type field. Select *Can Select Any Plan* for the Allowed Benefit Plan Changes field and *Default to Current Elections or Waive* for the Defaulting Rules field.
5. Run the passive event rule.
    a) Access the Schedule Passive Events task.
    b) Select *Run Now* as the Run Frequency and click OK.
    c) Enter a Request Name and select the Passive Event Rule you want to run.
    d) Select the Generate Passive Events check box and click OK.

Result

After running the passive event rule, workers will receive a benefit event that brings forward their existing retirement savings contributions. Workers can also opt out of the auto-increase by unselecting the Auto Contribution Increase in the benefit event.

Related Information

Tasks

Create Passive Event Rules on page 1443

Create Benefit Eligibility Rules on page 1255

Increase Retirement Savings Contributions Annually for Workers Opted into Automatic Contribution Increases

Prerequisites

- Create or edit a retirement savings plan and enable the Auto Contribution Increase check box. See Create Retirement Savings Plans on page 1302.
- Set up the Enroll in Retirement Savings EIB. See:../../../integrations/enterprise-interface-builder-eib-/inbound-eibs/dan1370797963228.dita and ../../../integrations/enterprise-interface-builder-eib-/Inbound-EIB-Template-Guidelines-and-Troubleshooting/benefits-administration-eibs/zdh1673529322156.dita
- Security:
  - *Set Up: Benefits* domain in the Benefits functional area.
  - *Custom Report Creation* in the System functional area.
  - *Manage: All Custom Reports* in the System functional area.
  - *Report Tag Management* in the System functional area.

Context

For each year, you can increase retirement savings contributions for workers opted in to automatic contribution increases. For the increases, extract the current elections, calculate the new contribution amounts, and then upload the new elections. Additionally, you can create an integration to automate this process.

Steps

1. Create and run a custom report to extract the retirement savings elections of workers who opted in to automatic contribution increases.
2. Extract the data to Excel and calculate the updated contribution amounts based on your policy.
3. Upload the updated elections using the Enroll in Retirement Savings EIB.

Set Up Default Benefits Coverage

Prerequisites

Security: *Set Up: Benefits* domain in the Benefits functional area.

Context

You can automatically enroll workers into these benefit plans if they don't complete their benefit elections:

- Health care.
- Insurance
- Retirement savings.
- Additional benefits.

Workday provides 2 strategies to ensure coverage:

Auto Enroll	Use auto enroll when the worker has no choice when making an election. During open enrollment, elections display as read-only.
Benefit Defaults	Use to assign a plan automatically during an event, but enable workers to waive or select another plan if offered.

	You can't use benefit defaults if you use allocation of retirement savings plans.

Steps

- To set up auto enroll:
  a) Access the Create Benefit Plan task.
  b) Select the Auto Enroll check box for the benefit plan.
  c) Access the Create or Edit Enrollment Event Rule task.
  d) Include the benefit event types and benefit coverage types in the Start or Waive Coverage tab.
  e) Select the *Default to Priority Coverage, Current Coverage or Waive* defaulting rule on the Coverage Rules tab if you use defaults for benefit plans.
- To set up benefit defaults:
  a) Access the Maintain Benefit Defaults task.
  b) For each type of benefit, consider:

Field	Description
Benefit Group	You can have more than 1 benefit group for each coverage type.
Coverage Type	Select only 1.
<name of benefit> Plan	Add 1 or more plans for each coverage type.
Coverage Target	For Health Care and Additional Benefits only. Select 1 target for each plan.
Priority	Enter the order that Workday uses to populate the employee's default benefit plan. The lower the number, the higher the priority.
Coverage Amount	For Insurance only. Select 1 coverage amount for each plan.
Employee Contribution Percentage	For Retirement Savings only. The percentage amount must conform to the plan minimum and maximum.
Employee Contribution Amount	For Retirement Savings only. The amount must conform to the plan minimum and maximum.
Amount Frequency	For Retirement Savings only. Automatically populates the frequency of the benefit group.
Amount Currency	For Retirement Savings only. Automatically populates the currency of the benefit group.

Result

Workday automatically populates the default plans and elections if you selected *Default to Priority Coverage or Waive* in the Defaulting Rules prompt on the Create Enrollment Event Rule task.

If there are multiple default plans, Workday attempts to give the employee the plan with the highest priority:

- If the employee is eligible for the plan with a priority of 1, assign plan 1.
- If the employee isn't eligible for plan 1, assign plan 2.
- If the employee isn't eligible for plan 2, set the default to waive.

Related Information

Tasks

Create Enrollment Event Rules on page 1349
Create Rules for Allocating Retirement Savings Contributions on page 1304
Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Set Up Auto-Enrollment for Benefit Plans

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

Workday enables you to auto-enroll employees into health care, insurance, and additional benefits plans.

Steps

1. Access the Create or Edit Benefit Plan task.
2. Create or select an existing spending account plan.
3. Select the Auto Enroll check box for the plan.

   For health care plans, the auto-enroll feature covers the entire plan, not the plan and a specific coverage level.

   Note: Don't select Auto Enroll for insurance plans that require evidence of insurability (EOI).
4. Access the Maintain Benefit Coverage Types task.
5. Select Only One Election for the coverage type to which the plan in step 2 belongs.

   Example: To enroll workers automatically in 1 of several benefit plans, select Only One Election for the coverage type. Then select the Auto Enroll check box on the Create or Edit Benefit Plan task for the benefit plan in which you want to auto-enroll employees.

FAQ: How does Workday check for changed employee benefits?

Workday runs the *If there is an effect on employee benefits?* condition rule when you use this task or process:

- The Change Benefits task.
- The *Change Benefit Elections* business process as a step on another business process.

This condition rule determines whether to create a benefit event that enables affected employees and contingent workers to enroll in benefits. The rule asks 3 questions:

- Has there been a gain or loss in the employee's benefit coverage in their current elections?

  Using eligibility rules, Workday determines if the employee has lost or gained benefit coverage in their current elections. If yes, then Workday creates a benefit event.

  For a job change that affects benefits, Workday determines eligibility changes by evaluating eligibility as of the event date of the job change. Workday compares the event date to the current election package. Workday checks if:

  - The employee is eligible for the benefit plan as of the job change date?
  - There's an election or waive record in the current election package.

  If there's no election or waive record, Workday creates a benefit event.
- What is the default behavior?

  Workday checks the Defaulting Rules selected in the Coverage Rules tab on the Create Enrollment Event Rule task. If you select 1 of these rules, Workday creates a benefit event:

  - *Default to Priority Coverage or Waive*
  - *Default to Waive*
- What can the employee do?

  Workday checks the Allowed Benefit Plan Changes prompt selection in the Coverage Rules tab on the Create Enrollment Event Rule task. If you select 1 of these options, Workday creates a benefit event:

  - *Can Select Any Plan* (including waive).
  - *Current Plan Only*.
  - *Current Plan or Option to Decrease* (only Spending or HSA).
  - *Current Plan or Option to Increase* (only Spending or HSA).
  - *Current Plan or Option to Waive*.

  Workday creates an event if you select 1 of these options and the employee's current benefits have changed coverage or eligibility:

  - *Only on Eligibility Change*.
  - *No changes allowed*.

Workday finalizes the event 1 day after the termination date if it finds that either:

- Benefit coverage has terminated.
- Employees can't change the plan.

Workday doesn't automatically notify the employee. To send a notification, add a condition rule and a notification step to the business process.

Cross Plan Dependencies

Create Cross Plan Enrollment Prerequisites

Prerequisites

- Create benefit groups.
- Create benefit plans.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

You can make enrollment a requirement in 1 or more *primary* plans, or a restriction for enrollment in a *secondary* plan. Example: You can require employees to elect supplemental life insurance before dependent life insurance.

Note: You can't use cross-plan enrollment prerequisites if you use allocation of retirement savings plans.

Steps

1. Access the Create Cross Plan Enrollment Prerequisite task.
2. As you complete this task, consider:

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Inactive</td><td>Select to inactivate the primary/secondary plan relationship.</td></tr>
<tr><td>Restricted to these Benefit Groups</td><td>Select the benefit groups to which the primary/secondary plan relationship applies.

If left blank, Workday assumes that the primary/secondary plan relationship applies to all benefit groups.</td></tr>
<tr><td>Primary Benefit Plan(s)</td><td>List the primary plans from which workers must select to qualify for the Secondary Benefit Plan(s).
If workers can select only 1 of the plans, select Only One Election on the Maintain Benefit Coverage Types task.
If workers can select multiple plans, clear the Only One Election check box on the Maintain Benefit Coverage Types task.
Select only 1 primary benefit plan in this field to require that workers enroll to qualify for the secondary benefit plan.

Note: Workday display only plans associated with the benefit groups listed in the Restricted to these Benefit Groups field.</td></tr>
<tr><td>Secondary Benefit Plan(s)</td><td>Select the plans that workers need to elect after selecting the primary benefit plan.

The Secondary Plan Rule determines whether a secondary plan is optional or required.</td></tr>
<tr><td>Secondary Plan Rule</td><td>If you want:
To make selecting a secondary plan optional, select May elect one or more secondary plan.

If you select this option, workers can elect or waive the secondary plan.</td></tr>
</table>

Option	Description
	• To require workers to elect one of the listed secondary plans, select *Must elect at least one secondary plan*. If selected, workers must select 1 secondary plan or waive the primary plan to complete their enrollment. • To require employees to elect either a primary or secondary plan, select *Only one primary or secondary plan can be elected*. If you select this option, workers can elect either a primary plan or a secondary plan, but not both.
Require the same Coverage Targets on all Health Care Plans	If selected, employees selecting coverage targets for 1 health care plan must select the same targets for related plans. Example: If the enrollee selects Family for medical coverage, Workday automatically populates the coverage target for dental as Family. You can't change this value.
Limit Display of Messages in Enrollment	Select to hide Workday-delivered cross-plan messages under Important Messages. Workday continues to display auto-waive and error messages.

Result

During the enrollment process, workers must submit benefit elections that conform to the cross-plan prerequisites defined for a benefit group.

Note: If an unsubmitted election package violates a cross-plan rule, Workday doesn't block or correct the invalid elections.

Next Steps

You can:

- Use the Edit Cross Plan Enrollment Prerequisite task to make updates to the plan details.
- Use the View Cross Plan Enrollment Prerequisite report to see the detailed information about a specific rule.

Related Information

Tasks

Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Examples

Examples: Cross Plan Enrollment Prerequisites on page 1389

Create Cross Plan Insurance Coverage Maximums

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

Define the maximum amount an employee can elect in insurance coverage when enrolling in 2 or more insurance coverage plans.

Steps

1. Access the Create Cross Plan Insurance Coverage Maximum task.
2. As you complete this task, consider:

Option	Description
Inactive	Inactivates the cross plan rule for future use when it's no longer valid. Transaction currently in progress completes as normal.
Restricted to these Benefit Groups	Limits the rule to specific benefit groups. If you leave this field blank, then Workday applies the rule to all benefit groups.
Benefit Plans	You can only select benefit plans belonging to benefit groups listed in the Restricted to these Benefit Groups field.
Cross Plan Maximum	Enter the total amount of insurance coverage that employees can elect.
Allow Coverage Up to Maximum	Defines how employees elect 1 or more insurance plans during enrollment. • Select so employees can elect 1 or more insurance plans with coverage up to the maximum. During enrollment, Workday displays only those coverage amounts that are equal to or 1 level greater than the maximum coverage. Workday automatically adjusts the coverage amount so that total coverage doesn't go over the maximum. • Clear the check box to display all options that employees can select. Workday automatically adjusts the coverage amount so that total coverage doesn't go over the maximum.
Limit Display of Messages in Enrollment	Select to hide Workday-delivered cross-plan messages under Important Messages. Workday continues to display auto-waive and error messages.
Benefit Plan Calculation Order	Orders the plans according to how you want the maximum coverage amount allocated if there are more than 1 Benefit Plans.

Result

Workday ensures that workers submit benefit elections that meet the maximum coverage of the cross plan insurance defined for a benefit group. However, employees can save their elections and return to the enrollment event to correct them later.

Example

To limit the total coverage for Basic and Supplemental Life to $650,000:

1. In the Restricted to these Benefit Groups field, select the benefit groups to which the $1,000,000 limit applies.
2. In the Benefit Plan(s) field, select *Basic Life* and *Supplemental Life*.

   Note that the combined coverage in both plans can't exceed the amount in the Cross Plan Maximum field.
3. In the Cross Plan Maximum field, enter $650,000.

With these selections, Workday works 2 different ways depending on whether or not you selected the Allow Coverage Up to Maximum check box. For an employee who has a salary of 100,000, Basic Insurance coverage is 1X, 2X, 3X, 4X, 5X the employee salary. Supplemental insurance coverage is the same as Basic.

If you selected the check box, the employee sees all options available for Basic Insurance. The employee elects 3X. For Supplemental Insurance coverage, the employee only sees the 1X, 2X, 3X, and 4X options. 4X is available because it's the option that takes the employee insurance coverage to the maximum. The employee elects 4X. Because the maximum is $650,000, Workday automatically adjusts the coverage amount to $350,000 to prevent the total amount from exceeding the maximum.

```
Total Insurance Coverage = 650,000 (Basic = 3 X 100,000, Supplemental = 4 X
100,000) - (Workday's adjustment 50,000 to meet Cross Plan Maximum)
```

If you didn't select the check box, the employee sees all options available for Basic and Supplement. If the employee elected 3X for Basic and 4X for Supplemental, Workday would display an error when the employee submitted the elections. The employee has to go back into the enrollment form to correct the elections.

Related Information
Tasks
Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Create Cross Plan Insurance Percentage Maximums

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

Define the maximum percentage amount that an employee can elect in insurance coverage when enrolling in 2 or more insurance plans.

Steps

1. Access the Create Cross Plan Insurance Percentage Maximum task.
2. When completing the task, consider:

Option	Description
Inactive	Inactivates the cross plan rule for future use. Transaction currently in progress complete as normal.
Restricted to these Benefit Groups	Limits the rule to specific benefit groups. If you leave this field blank, then Workday applies the rule to all benefit groups.

Option	Description
Controlling Benefit Plans	The plans that control the maximum amount of coverage that workers can elect in the plans you select for the Restricted Benefit Plans field. Workday requires that you include the coverage type of the controlling benefit plan in the same event type as the restricted benefit plans. Additionally, we recommend that you specify this coverage type in the enrollment event rule on the Start or Waive Coverage and Coverage Rules tabs. Specify it for all benefit groups affected by the controlling benefit plan.
Percent Limited To	The percentage of an employee's total coverage amount for the plans you select in the Controlling Benefit Plans prompt. Example: You select Voluntary Life as the controlling benefit plan and the Spouse Life as the restricted benefit plan. You restrict the Spouse Life plan to a 50% limit of what the worker elects for Voluntary Life.
Restricted Benefit Plans	The plans that use the limited coverage percentage, applied from the Percent Limited To field.
Allow Coverage Up to Maximum	Defines how employees elect 1 or more insurance plans during enrollment. • Select so employees can elect 1 or more insurance plans with coverage up to the maximum. During enrollment, Workday displays only those coverage amounts that are equal to or 1 level greater than the maximum coverage. Workday automatically adjusts the coverage amount so that total coverage doesn't go over the maximum. • Clear the check box so employees can elect coverages that go over the maximum. A warning displays and the employee must correct their elections.
Limit Display of Messages in Enrollment	Select to hide Workday-delivered cross-plan messages under Important Messages. Workday continues to display auto-waive and error messages.
Benefit Plan Calculation Order	Orders the plans according to how you want the maximum coverage amount allocated if there are more than 1 Restricted Benefit Plans.

Result

During enrollment, Workday automatically enforces the cross plan rules and adjusts the amount according to the defined configuration.

Example

To limit the life coverage of a spouse to 50% of the employee's income, enter:

Controlling Benefit Plans	Voluntary Life
Percent Limited To	50
Restricted Benefit Plans	Spouse Life

Related Information
Tasks
Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Create Cross Plan Retirement Savings Plan Contribution Maximums

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

Define the maximum amount that an employee can elect in 1 or more retirement savings plans.

Steps

1. Access the Create or Edit Cross Plan Retirement Savings Contribution Maximum task.
2. As you complete this task, consider:

Option	Description
Inactive	Inactivates the rule. Transactions currently in progress complete as normal.
Restricted to these Benefit Groups	Limits the rule to specific benefit groups. If you leave this field blank, then Workday applies the rule to all benefit groups.
Benefit Plans	You can only select benefit plans belonging to benefit groups listed in the Restricted to these Benefit Groups field.
Contribution Percentage Maximum	Enter the total contribution amount - percent of salary employees can elect.
Contribution Amount Maximum	Enter the total contribution amount - fixed amount employees can elect.
Limit Display of Messages in Enrollment	Select to hide Workday-delivered cross-plan messages under Important Messages. Workday continues to display auto-waive and error messages.

Result

Workers can only submit benefit elections that conform to the cross-plan rule defined for a benefit group.

Related Information
Tasks
Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Examples: Cross Plan Enrollment Prerequisites

You create 3 prerequisites for cross plan enrollments:

- Create a rule that makes the election of a High Deductible Health Care Plan (HDHPs) a prerequisite for electing a Health Savings Account Plan (HSA).

  You make the Limited HSA plan available to all workers who elect either the high deductible Gold Care or high deductible Silver Care plan. You allow only 1 HDHP election and require Workers to select the Limited HSA plan if they elect 1 of the HDHPs.

  Note: For the health care coverage types that include the Gold Care and Silver Care plan, you select the Only One Election check box on Maintain Benefit Coverage Types.

  Enter these values:

Field	Value
Primary Benefit Plan(s)	Gold Care Silver Care
Secondary Benefit Plan(s)	Limited HSA.
Secondary Plan Rule	Must elect at least one secondary plan.

- Make Election of an HDHP a prerequisite for electing both a required HSA and an optional catch up plan.

  You make 2 HSA plans available to workers over 55 who elect the high deductible Gold Care plan:

  - A General HSA plan.
  - A Catch Up HSA plan.

  Workers electing the Gold Care HDHP must enroll in the General HSA plan. You make the Catch Up HSA plan optional and available only to employees who have elected the Gold Care HDHP and the General HSA plan. Employees can only elect the Catch Up HSA plan by first electing the General HSA plan.

  Note: For the health care coverage types that include the Gold Care and Silver Care plan, you select the Only One Election check box on Maintain Benefit Coverage Types.

  1. Create a cross plan enrollment prerequisite rule that makes the Gold Care HDHP plan a prerequisite for electing the General HSA plan:

     Enter these values:

Field	Value
Primary Benefit Plan(s)	Gold Care
Secondary Benefit Plan(s)	General HSA
Secondary Plan Rule	Must elect at least one secondary plan.

  2. Create another cross plan enrollment prerequisite rule that makes the Gold Care HDHP plan a prerequisite for electing the Catch Up HSA plan:

     Enter these values:

Field	Value
Primary Benefit Plan(s)	Gold Care
Secondary Benefit Plan(s)	Catch Up HSA
Secondary Plan Rule	Can elect 1 or more secondary plans.

Field	Value
	Required because the Gold Care HDHP is a prerequisite not only for the General HSA plan, but for the Catch Up HSA plan.

3. Create a third cross plan enrollment prerequisite rule that makes he General HSA plan a prerequisite for enrolling in the Catch Up HSA plan:

   Enter these values:

Field	Value
Primary Benefit Plan(s)	General HSA.
Secondary Benefit Plan(s)	Catch Up HSA.
Secondary Plan Rule	Can elect 1 or more secondary plans.

- Create a cross plan prerequisite rule that allows an employee to elect a Spending Account or a Health Savings Account plan, but not both.

  Workers can elect the Silver Health Savings Account (HSA) or the Gold Health Care Spending Account plan, but not both.

  Note: During enrollment, the employee will only be able to submit their elections if they elect 1 of the plans.

  Enter these values:

Field	Value
Primary Benefit Plan(s)	Silver HSA
Secondary Benefit Plan(s)	Gold Health Care Spending Account
Secondary Plan Rule	Can elect only 1 primary or secondary plan.

Related Information

Tasks

Create Cross Plan Enrollment Prerequisites on page 1382

Benefit Credits and Surcharges

Steps: Manage Benefit Credits and Surcharges

Context

You can configure how to apply benefits credits and surcharges during enrollment events. You can also specify the order in which Workday applies credit offsets to benefit coverage types that you configure. Workday can display the distribution of credit offsets so that workers can understand how the offsets reduce the cost of their benefit plans.

Steps

1. Assign users to security policies.

   See Concept: Security Policies.
2. Set up benefit credits.

   See Steps: Set Up Benefit Credits on page 1391.

3. Activate benefit credits.
    a) Access the Create or Edit Benefit Group task.
    b) On the Benefit Credits tab, select the Enable Benefit Credits check box.

    Security: *Set Up: Benefits* in the Benefits functional area.
4. Assign Benefit Credits to a Benefit Group.
5. Assign benefit credits to a health care, insurance, or additional benefit plan.

    See:

    - Create Health Care Plans on page 1289.
    - Create Insurance Plans on page 1295.
    - Create Additional Benefit Plans on page 1313.
6. Assign benefit credits to healthcare rates.

    See: Create Health Care Rates on page 1269.
7. Assign annual benefit credits to a worker.
    a) Select Benefits > Change Benefits Annual Credit from the related actions menu of the worker.
    b) Enter the type of benefit annual credit, currency, and amount.
8. Change Wellness Data on page 1399.
9. Set up benefit surcharges.

    See Steps: Set Up Benefit Surcharges on page 1392.

Result

Workers eligible for the benefit group or enrolled in the appropriate benefit plans receive the assigned credits.

If you select the Enable Remaining Benefit Credits and Display Benefit Credits in Enrollment check boxes, Workday displays:

- The total credits applied to each plan in the Elected Benefits grid on the Benefits Statement and Current Benefit Elections pages.
- These grids on the Review and Sign page:
    - A list of used credits by benefit plan, on the Costs Offset By Credits grid.
    - The net costs of elected benefits after Workday applies the credits in the Total Benefits Cost grid.

Next Steps

To see a list of workers that includes the name of credits they received, amount of credit, currency, and frequency, use the Credit Summary for Workers report.

Related Information

Concepts

Concept: Benefit Credits and Surcharges on page 1401

Steps: Set Up Benefits on page 1237

Include Coverage Types in Total Benefit Costs on page 1400

Steps: Set Up Benefit Credits

Context

Define benefit credits and credit bundles.

Steps

1. Create Benefit Annual Credit Types on page 1393.

   Benefit annual credits enable you to award a specific credit amount to a specific employee.
2. Create Benefit Credits on page 1393.
3. Create Benefit Credit Bundles on page 1395.

   If you have a set of credits that are always going to be together, you can group them into a benefit credit bundle.

Related Information
Concepts
Steps: Manage Benefit Credits and Surcharges on page 1390

Steps: Set Up Benefit Surcharges

Context

For spouse/domestic partner and dependent relationships, Workday enables you to:

- Track whether the relationship is eligible or enrolled in their own health care plan.
- Create a flat amount surcharge and apply that surcharge to specific health care plans or rates.
- Create tobacco surcharges for the employee and their dependents.

Steps

1. Create Benefit Surcharges on page 1398

   Security: *Set Up: Benefits* in the Benefits functional area.
2. Add dependents.

   For spouses or domestic partners, you can select the check box for This person is or could be enrolled in Health Care coverage elsewhere. See Manage Dependents and Beneficiaries on page 1500.

   You can also indicate whether a spouse or domestic partner uses tobacco for Tobacco Use.
3. Assign benefit surcharges to a health care plan.

   See Create Health Care Plans on page 1289.
4. Assign benefit surcharges to health care rates.

   See Create Health Care Rates on page 1269.

Result

During enrollment, Workday checks for spousal and tobacco surcharges.

- For spousal surcharges, Workday checks:
  - If an elected health care plan or rates associated with the plan have a benefit surcharge associated with it.
  - If the employee has elected coverage for a spouse or domestic partner that has the This person is or could be enrolled in Health Care coverage elsewhere check box selected.
  - If the coverage target has a surcharge and covers spouses or domestic partners.

  If these 3 conditions are met, then Workday adds the surcharge to the cost of the benefits.
- Workday checks for tobacco use surcharges. If the employee, or spouse (or domestic partner), indicates tobacco use, Workday adds the surcharge.

Workday sends the surcharges to Workday Payroll or Payroll Interface as deductions.

Next Steps

Use the:

- Delete Benefit Surcharge task to delete surcharges that aren't assigned to a health care plan or rate.
- View Benefit Surcharge report to see detailed information about the surcharge.

Related Information
Concepts
Steps: Manage Benefit Credits and Surcharges on page 1390

Create Benefit Annual Credit Types

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

Use benefit annual credits when you want to define specific credit amounts that might vary from employee to employee or don't fit within the delivered benefit credit framework. A benefit annual credit awards an employee with a specific flat amount.

Create the benefit annual credit type, then assign the credit and a specific amount to the individual employee. Employees can be awarded more than 1 benefit annual credit. This provides the most flexibility in awarding credits to employees.

Steps

1. Access the Maintain Benefit Annual Credit Types task.
2. Enter a name and description.

Next Steps

Use the:

- View Benefit Annual Credit Types report to see detailed information.
- Maintain Benefit Annual Credit Types task to make any changes.

Related Information
Concepts
Steps: Set Up Benefit Credits on page 1391

Create Benefit Credits

Prerequisites

- Create benefit annual credit types.
- Create compensation elements.

  Complete this task if you're using percent-of-salary type credits and want to define employees' salary by a compensation element.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

You can create credits that are based on:

- A flat amount.
- Employee work-related information.

- Employee demographics.
- Dependent-related information.
- Enrollment information.

Benefit credits are based on Workday-delivered benefit credit types. These delivered credit types provide the criteria used to determine an employee's eligibility for the benefit credit and the applied amount.

Steps

1. Access the Create Benefit Credit task.
2. As you complete this task, consider:

Option	Description
Currency	If this currency value is different from the employee's currency, Workday converts the credit amount into the amount for the employee's currency.
Frequency	If the frequency for the benefit credit is different than the frequency on the benefit group, Workday converts the amount of the benefit credit according to the frequency.
Multiply Benefits Annual Credit by	For Benefits Annual Credit Based Credits only. Enter a number by which an employee's annual benefit credit is multiplied. The number can be less than 1. Example: If you want to divide the credit in half, then enter 0.5.
Benefit Annual Credit Type	For Benefits Annual Credit Based Credits only. Select the credit type required for an employee to receive this benefit credit.
Calculate As Of	For Benefits Length of Service Based Credits or Salary Source Based Credits: • *Coverage Begin or Plan Year Begin*: If the employee has coverage as of the start of the plan year, Workday uses this date. Otherwise, Workday uses the date the employee originally enrolled in the plan. • *Coverage Begin or Specific Date:* Workday compares the original enrollment date with the date entered in the Specific Month and Specific Day fields. Using the most recent date to retrieve the value, it assumes that the year is the current benefit plan year. If you want to use the prior plan year values, select the Of Prior Plan Year check box.
From/To (name of benefit credit type)	For credits that are based on information such as length of service or age. Build a table that associates the credit amount with a specific range.

Option	Description
	Avoid having a gap in the ranges defined by the rows in the table. Otherwise, Workday doesn't apply the credit amount if a value falls in the gap. Don’t use a From/To value in more than 1 row because it causes an overlap in the ranges. When there’s an overlap, Workday applies a credit for all rows that match the value, rather than just the row you intended.
Amount	For credits based on currency amounts, enter a positive amount only.

Next Steps

Use the:

- Edit Benefit Credit task to make changes.
- Delete Benefit Credit task to delete credits assigned to a benefit group, benefit plan, or credit bundle.
- View Benefit Credit report to see detailed information.
- Test Benefit Credit report to see if a credit provides the desired results.

  You can test credits based on employee demographic- or job-related information, or on dependent information. You can't test credits based on information from an enrollment event.
- Edit Benefit Group task to assign benefit credits to a benefit group.
- View Benefit Credit Change History report to see the changes for a credit.

Related Information
Concepts
Steps: Set Up Benefit Credits on page 1391

Create Benefit Credit Bundles

Prerequisites

- Define benefit credits.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

If you have a set of credits that will always be together, you can group them into a benefit credit bundle. The credit that is applied is the total of the individual benefit credits. Credit bundles save time when repeatedly assigning an identical group of credits.

Example: credits awarded for wellness plan participation, wellness score, and tobacco usage are often applied together. Including these three credits in a single bundle saves time and reduces configuration mistakes.

Steps

1. Access the Create Benefit Credit Bundle task.
2. Enter the:
    - Effective Date
    - Credit Name

3. Consider:

Option	Description
Currency	If the currency you enter here is different from the employee's pay currency, Workday converts the credit amount into the amount for the employee's currency.
Frequency	If the frequency you enter here is different from the employee's pay frequency, Workday converts the credit amount according to the employee's pay frequency.

Next Steps

Use the:

- Change the bundle with the Edit Benefit Credit Bundle task.
- View details about the bundle with the View Credit Bundle report.

Related Information
Concepts
Steps: Set Up Benefit Credits on page 1391

Assign Benefit Credits to a Benefit Group

Prerequisites

Select Flex Credits can be Applied for 1 or more of these coverage types for which you want to configure credit-offset deductions:

- Health Care
- Insurance
- Additional Benefits

See Manage Benefit Coverage Types.

Security: *Set Up: Benefits* in the Benefits functional area.

Context

You can assign benefit credits to a benefit group and then configure credits to offset the cost of the benefit plans the worker elects. Workday also provides options for how to display credit totals and offsets to workers. If you use a retroactive effective date when configuring credits for the benefit group, the changes apply to future dates as well.

Steps

1. Access the Create Benefit Group or Edit Benefit Group task.
2. From the Benefits Credits tab, select the Enable Benefit Credits check box to activate benefit credits for the benefit group.
3. (Optional) Select the Enable Remaining Benefit Credits check box to configure the order in which Workday applies benefit credit offsets.

   Workday applies the credit configuration to all benefit events associated with the benefit group.

   Note: You can select Excess Credits to Health Spending Accounts (Canada) only if you clear the Enable Remaining Benefit Credits check box.

4. (Optional) Select Display Benefit Credits in Enrollment to display the benefit credit totals.

   If you have also selected Enable Remaining Benefit Credits, Workday displays the remaining credits and the credits used to offset benefit costs to workers during an enrollment event and on their benefits statements.
5. (Optional) Add the coverage types from which you can select unused plan credits in the Source Coverage Type for Unused Plan Credits grid.

   Workday first applies plan credits to offset the cost of the associated plan. Any leftover credits become *unused credits*, and available for offsetting deductions for other coverage types.
6. (Optional) Assign benefit credits to the benefit group in the Benefit Group Credit section.
7. (Optional) Assign benefit credits to workers that are eligible, electing, or waiving specific coverage types in the Coverage Type Credits grid.
8. (Optional) Configure the order in which Workday offsets the deductions using benefit group or unused plan credits. Add the coverage type and the order number in the Offset Deductions with Benefit Credits grid.

   Example: Add coverage types of long-term disability and short-term disability. Specify 1 for short-term disability and 2 for long-term disability to indicate in what order coverage types get the credit offset. The cost of short-term disability is $20 and the long-term disability cost is $80. If the worker has a credit balance of $75, Workday applies $20 of the credit balance to the short-term disability plan. It then applies the remaining $50 to the long-term disability plan.

Result

Workday calculates the remaining credit amount based on the coverage types in the benefit events. When applying credits, Workday uses this priority order:

- Benefit plan credits.
- Unused plan credits.
- Benefit group credits, which also include coverage type credits.

When you select the Enable Remaining Benefit Credits check box, Workday displays:

- The remaining credit amount as a summary of remaining credits after the offset of the cost of benefit elections.
- The remaining credit amount as a summary of remaining credits after the offset of benefit plan cost.
- Plan Net Costs as $0.00 on the Review and Sign page when Workday completely offsets the costs, resulting in a zero balance.
- The total applied credits for each benefit plan on the Current Benefit Elections page.
- Applied credits per benefit plan, remaining credits, and net costs after Workday applies credits on the worker benefits statement.

Note: Workers can't view the new offset functionality of benefit credits from the Workday mobile app.

Next Steps

If you include an offset coverage type in a benefit event type, you need to add all offset coverage types in that event type.

Related Information

Concepts

Steps: Manage Benefit Credits and Surcharges on page 1390

24R1 What's New Post: Benefit Credit Offsets

Create Benefit Surcharges

Prerequisites

- Create related person types for tobacco use surcharges.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

You can create surcharges for health care plans and rates. Workday delivers 2 surcharge types: Spouse and Tobacco Use. You can create tobacco use surcharges for workers and any dependents that use tobacco.

Steps

1. Access the Create Benefit Surcharge task and select the type of surcharge.

   As you complete the task, consider:

Option	Description
Currency	If the currency you enter is different from the currency of the employee, Workday converts the surcharge amount into the currency of the employee.
Frequency	Workday converts the amount of the benefit surcharge using the frequency of the benefit group, if it differs from the benefit credit.

2. (Optional) To create tobacco use surcharges for spouse or domestic partner and dependents, select Tobacco Surcharge Type.

   Create a surcharge for every individual or group of person types that a worker can select for their plan. You can create an individual person type (Example: Spouse) or a group of person types (Example: Employee + Spouse + 1 Child).

   Note: When a worker selects health care for certain target types during enrollment, Workday searches the rate bands for surcharges based on the person type. Workday first searches for a matching group. If it can't find a matching group, it searches individual person types. When it can't find any match, Workday applies the surcharges when:

   - The requested count is higher than the maximum configured count. Workday rounds down to the maximum count and applies the assigned surcharge.
   - The requested count is less than the maximum configured count. Workday applies a surcharge of zero.

   As you complete this section, consider:

Option	Description
Person Type	Select an individual person type by selecting from the prompt. Create a group of person types by adding additional rows that are associated with an Amount value.
Count	The number of individuals included in the person type. Example: For a child person type, you might select 2.
Amount	Can be the amount for an individual person type or a group.

Result

Workday creates the surcharges and makes them available for benefit plan rates.

Example

This example displays how Workday matches worker elections to tobacco surcharge types.

You create these surcharges:

Groups	Person Type	Count	Amount (USD)
	Employee	1	$10
	Spouse	1	$7
	1 Child	1	$5
	2 Children	2	$11
	4 Children	4	$15
Employee + Spouse	Employee	1	$20
	Spouse	1	
Employee + 1 Child	Employee	1	$18
	Child	1	

During enrollment, Alysse elects health care coverage for herself and her family. If she selects:

- *Employee + 1 Child*, Workday locates the matching group and applies a surcharge of $18 USD.
- *Employee + 2 Children*, Workday can't locate a matching group, so it searches for individual person types. Workday finds the matching person types of *Employee* and *2 Children* and applies a surcharge of $21 USD.
- *Employee+ 5 Children*, Workday finds *Employee*, but can't find a match for 5 children. Alysse's selection of 5 children is above the highest count for any child. Workday rounds down to the highest count and applies a surcharge of $25.
- *Employee+ 3 Children*, Workday finds *Employee*, but can't find a match for 3 children. Because the count for children is under the maximum number, Workday calculates a surcharge of zero for the children. Workday applies a surcharge of $10 for the employee.

Next Steps

Add surcharges to health care benefit plans and rates.

Related Information
Concepts
Concept: Benefit Credits and Surcharges on page 1401
Create Health Care Rates on page 1269
Steps: Set Up Benefit Surcharges on page 1392

Change Wellness Data

Prerequisites

- Security: *Worker Data: Wellness* domain in the Benefits functional area.
- Define the relationships that you can add wellness information to.

  Select the Include Relationship for Wellness check box in the Maintain Related Person Relationships task.

Context

You can enter employee and dependent wellness information. You can also upload wellness information using the *Put Worker Wellness Data* web service.

Steps

1. Select Benefits > Change Wellness Data from the related actions menu of the employee.
2. Enter wellness information.

   Sections display for the employee and any dependents that have relationships defined in the Maintain Related Person Relationships task.

   As you complete the task, consider these items for both employee and dependent sections:

Option	Description
Participates in a Wellness Program	Select to measure eligibility for benefit credits based on *Employee Wellness Program Participation Based Credit*.
Wellness Score	Enter to measure eligibility for benefit credits based on *Employee Wellness Score Based Credit*.
Uses Tobacco	Select to measure eligibility for benefit credits based on *Employee Tobacco User Based Credit*. Note: If you hide the Tobacco Status (Dependent) localized field in the Maintain Localization Settings task, employees can't see this check box for dependents.

Related Information

Concepts

Steps: Manage Benefit Credits and Surcharges on page 1390

Include Coverage Types in Total Benefit Costs

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

If you use the benefits integration with Sun Life, you can select the coverage types that Workday uses to calculate an employee's total benefit cost.

Steps

1. Enable flex credits for a coverage type.
   a) Access the Maintain Benefit Coverage Types task.
   b) Select the Flex Credits can be Applied check box for Health Care and Insurance coverage types.
2. Access the Edit Benefit Groups task.

3. On the Benefits Credits tab and in the Offset Deductions with Benefits Credits section, consider:

Option	Description
Coverage Type	Select the Coverage Types you want included in the calculation of an employee's total benefit cost.
Benefit Credits Offset Order	Indicate the order in which to apply benefit credits to a worker's elections to reduce or eliminate benefit costs. A lower number indicates a higher priority.

Result

When sending benefit costs and credits to Sun Life, Workday looks at the coverage type and order to determine cost amounts.

Example: An employee has a benefit credit of 300.00 USD and costs for medical are 250.00 USD and dental are 75.00 USD. The order for medical is 1 and dental is 2. Workday sends no costs for medical and 25.00 for dental.

Related Information
Concepts
Steps: Manage Benefit Credits and Surcharges on page 1390

Concept: Benefit Credits and Surcharges

Workday delivers a flexible framework for applying benefit credits and surcharges. You can create benefit credits and apply them to a:

- Benefit group
- Coverage types within a benefit group
- Healthcare, insurance, or additional benefit plans
- Healthcare rates

Workday applies benefit surcharges to coverage targets on health care plans and rates when:

- The employee elects coverage for a spouse or domestic partner who has the This person is or could be enrolled in Health Care coverage elsewhere check box selected.
- The employee indicates that the employee and 1 or more dependents use tobacco.

You create the benefit credits based on Workday-delivered benefit credit types. These delivered benefit credit types are based on dependent, employee, and enrollment information. They provide a wide range of criteria by which you can award amounts. Examples:

- Length of service
- Dependent full-time student status
- Employee age
- Employee compensation package
- Flat amount
- Performance review
- Wellness score

You can group individual benefit credits into benefit credit bundles. The applied amount of the credit is the total of the individual benefit credits. Once you define and assign your benefit credits and surcharges, Workday applies them to eligible employees.

Benefit credits are cumulative: Total cost of benefits and any surcharges - Total number of benefit credits = The total cost to the employee.

If there’s an excess of credits, Workday applies that amount to the employee's taxable income.

When an employee eligibility change affects a credit or surcharge amount, Workday automatically reflects it in the employee's total cost of benefits. Workday automatically updates the employee's total benefit cost and notifies Workday Payroll and the Payroll Interface:

- For an added, updated or deleted credit from a benefit group, coverage type, or benefit plan.
- For a changed or deleted healthcare rate.

This table illustrates the relationship between Benefits, Payroll, and Payroll Interface:

<table>
<tr><th>Benefits</th><th>Relationship</th><th>Payroll / Payroll Interface</th></tr>
<tr><td>Benefit Costs
Medical
Life
Retirement Savings
Additional
Benefit Surcharges</td><td>Sent as Deductions</td><td>Deductions
Medical
Life
Retirement Savings
Additional
Benefit Surcharges</td></tr>
<tr><td>Benefit Credits
Medical
Life
Retirement Savings
Additional</td><td>Sent as Earnings</td><td>Earnings
Medical
Life
Retirement Savings
Additional</td></tr>
<tr><td>Excess Credits (if credits exceed costs)</td><td>Added to Taxable Income</td><td>Taxable Income</td></tr>
</table>

Note: To transfer benefit credit information to an external payroll system, use the Maintain External Payroll Earnings task.

Related Information
Concepts
Steps: Manage Benefit Credits and Surcharges on page 1390

Multiple Jobs

Steps: Set Up Multiple Jobs for Benefit Eligibility

Context

You can base benefit eligibility on information pulled from the employee's primary job, or any of their other jobs. To set up Workday so that you base benefits eligibility on multiple jobs, you can:

- Option A: Select the jobs Workday uses to determine benefit eligibility, 1 employee at a time.
- Option B: Create rules and assign the rule to a benefit group. Workday can automatically define which jobs to use to determine an employee's benefit eligibility.
- Option C: Use a combination of both methods. Let Workday automatically define the benefit jobs used and then override selected employees.

Steps

1. Access the Edit Tenant Setup - HCM task.

   Select *Multiple Jobs* in the Position Setup Options field. Verify that employees can have additional or international jobs. See Reference: Edit Tenant Setup - HCM for details.

2. Create Insurance Coverages on page 1272.

   Select the Combine Benefit Jobs for Salary Source check box to define how Workday calculates the employee's salary for insurance coverage.
3. Create Insurance Rates on page 1275.

   Create rate tables containing insurance plan costs based on amount of covered salary.
4. Create Custom Business Processes.

   (Option A) Configure the *Change Benefit Jobs* business process to meet the needs of your organization. Add the *Change Benefit Elections* to the business process for Workday to perform a benefit eligibility check when you use the *Change Benefit Jobs* task.
5. Edit Business Process Security Policies.

   (Option A Only) Review the security policy for the *Change Benefit Jobs* business process under the *Benefits* domain.
6. Create Enrollment Events on page 1343.

   (Option A Only) Create a benefit event that defines how Workday processes the changes made to employee jobs used to determine benefit eligibility.
7. Create Selection Rules for Benefit Jobs on page 1403.

   (Option B Only) Create condition rules that Workday uses to determine which employee jobs to use to determine benefit eligibility.
8. Assign Benefit Job Selection Rules to Benefit Groups on page 1404.

   (Option B Only) Assign the benefit job eligibility rule to a benefit group. Workday automatically determines which jobs to use to determine eligibility for all employees in the benefit group.
9. Change Jobs Used for Benefit Eligibility on page 1405.

   (Required for Option A, optional for Option B) Select 1 or more of the employee's jobs to use to determine benefit eligibility. For Option B, this selection overrides the automatic job selections made by Workday based on how you configured the Benefit Job Selection Rule.

Next Steps

- Use View Benefit Jobs report to see a list of jobs, by employee, that Workday uses to determine benefit eligibility as of a given date.
- Use the View Benefit Eligibility report to see what plans the employee is eligible for.
- Use the Benefit Jobs Eligibility and Position Summary report to see a list of employees, their current positions, and the jobs Workday uses to determine benefits eligibility.

Related Information

Tasks

Steps: Set Up Benefits on page 1237

Create Selection Rules for Benefit Jobs

Context

You can create condition rules that Workday uses to decide which jobs determine an employee's benefit eligibility.

Steps

1. Access Create Benefit Job Selection Rule.
2. As you create the rule, consider:

Option	Description
And/Or	Select the logic you want to apply between the conditions of the rule.

Option	Description
	• For And logic, a rule condition must always resolve to true for the rule to apply. • For Or logic, a rule condition requires that at least one *or* rule condition resolves to true for the rule to apply. Note: Only report fields marked with *Benefit Jobs* combine data across benefit jobs.
(	If you want to group one or more logical statements together, use the left-hand parentheses to indicate the beginning of the grouping.
Source External Field or Condition Rule	You can select: • A report field. • An existing condition rule.
Relational Operator	The type of report field or subrule determines available options.
Comparison Type	Specify whether the source is compared to another field or to a value that you enter in the Comparison Value column.
Comparison Value	Select a comparison field or enter the value that is compared to the source.
)	If you want to close the grouping of one or more logical statements, select the right-hand parentheses.

Related Information
Tasks
Steps: Set Up Multiple Jobs for Benefit Eligibility on page 1402

Assign Benefit Job Selection Rules to Benefit Groups

Prerequisites

- Create selection rules for benefit jobs.
- Security: *Set Up: Benefits* in the Benefits functional area.

Context

Assign the selection rule for the benefit job to a benefit group, using the criteria you specify in the benefit job rule. Workday automatically determines which jobs to use to determine employee benefit eligibility.

Note: You can use the *Get/Put Benefit Rule by Group* web services to attach multiple benefit job rules to a benefit group simultaneously.

Steps

1. Access Maintain Benefit Job Rules by Group.

2. Assign Benefit Job Selection Rules to Benefit Groups.

   You:

   - Can assign a rule to 1 or more benefit groups.
   - Can't assign a benefit group to more than 1 rule.

Next Steps

To view a rule and whether a specific employee meets the conditions of the rule, use View Benefit Eligibility Rule Results.

Related Information

Tasks

Steps: Set Up Multiple Jobs for Benefit Eligibility on page 1402

Change Jobs Used for Benefit Eligibility

Context

You can select the jobs held by an employee that you want Workday to use to determine benefit eligibility.

When enrolling or changing benefit elections, Workday uses these jobs to determine which plans the employee is eligible for.

Note: To upload the benefit job selections for many employees at a time, use the *Get/Put Benefit Jobs* web service.

Steps

1. Access the Change Benefit Jobs task.

   Enter the effective date and select the employee.
2. As you complete this task, consider:

Option	Description
Use Benefit Jobs	Select this check box if you want to use other jobs held by the employee to determine benefit eligibility. When you: • Select the check box, the Employee Jobs grid becomes available. • Clear this check box, Workday clears all selected jobs and makes the Employee Jobs grid unavailable.
Use for Benefit Eligibility	Select this check box if you want Workday to use this job to determine benefit eligibility.

Result

Workday creates an event called *Benefit Jobs Event* that you can view in the View Worker History report.

Related Information

Tasks

Steps: Set Up Multiple Jobs for Benefit Eligibility on page 1402

Open Enrollment

Setup Considerations: Open Enrollment

You can use this topic to help you make decisions when planning your configuration and use of open enrollment. 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

The open enrollment workflow enables your workers to elect their benefits during the open enrollment period. Workers can make their elections from the Workday Mobile app or the Workday browser application.

Business Benefits

With Workday Benefits open enrollment, your workers can efficiently enroll in benefit plans during the annual enrollment window.

Use Cases

Use Case	Role
Configure annual open enrollment.	Benefits Administrator
Configure midyear open enrollment (Example: 07/01 - 6/30).	Benefits Administrator
Review benefit groups and update for the upcoming year.	Benefits Administrator
Configure provider updates and map old provider plans to new plans.	Benefits Administrator
Create or update rates for plans.	Benefits Administrator

Use Case	Role
Create or update cross-plan rules for new plans.	Benefits Administrator
Configure HSA and FSA enrollment.	Benefits Administrator
Configure autoenrollment of new plans.	Benefits Administrator
Create or maintain integrations with providers.	Benefits Administrator

Questions to Consider

Feature	Question	Considerations
Plan Year Definition	Have you created a new plan year definition?	If you've created new plans for the upcoming plan year, include them in the new plan year or a rolling plan year definition. Use the Create Benefit Plan Year Definitions on page 1418 task. Note: Changing the dates of an existing plan year definition can impact your employees' current benefit enrollments.
	Do you have benefit plans you aren't offering in the upcoming plan year?	Include only the plans that you're offering in the new plan year definition. Don't remove plans from an existing plan year definition. You can use the Do Not Use check box in the Edit Benefit Plan task to hide plans you're not offering from the Benefit Plan prompt.
Enrollment Instructions	Do you need to create or update your enrollment instructions?	You can configure open enrollment instructions using the Maintain Enrollment Instructions task. See Set Up Benefit Enrollment Instructions on page 1253. Workers see configured enrollment instructions on the pages where they select a plan and where they select coverage tiers and amounts.
Enrollment Configuration	Do you need to create or update your open enrollment event type?	Ensure that you include all coverage types that you're offering in the new plan year. See Manage Benefit Coverage Types on page 1243. Include any new coverage types and those types that you continue to offer from the previous plan year.

	Do you want to provide coverage details about each benefit plan?	You can configure the Expanded Plan Details section of the Edit Benefit Plan task.
	Are you planning to move to a new provider for any of your benefit plans?	Map old plans that you're no longer offering to the new plans. Mapping prevents Workday from waiving coverage. Use the Benefit Plan Mapping tab on Edit Benefit Group task.
	Have your rates changed?	Update the new rates using an effective date of when the rate change takes effect. Example: The first date of the new plan year. • For health care plans, you might need to edit a health care rate if you don't configure them on the benefit plan. See Create Health Care Rates on page 1269. • For insurance plans, edit the insurance plan rate because these plans don't let you configure rates directly on the plan. See Create Insurance Rates on page 1275.
	Do you need to hide the Tobacco Use question for dependents by country?	Update localization settings for the Tobacco Use (Dependent) field. See Maintain Localization Settings on page 144.
	Do you need to update electronic signatures?	You can create a unique electronic signature for each new coverage type.
	Do you need to define default benefit elections?	Typically, you need benefit elections if you require coverage for a specific type, when employees become eligible. Set up default benefit elections in the Maintain Benefit Defaults task. See Set Up Default Benefits Coverage on page 1379. You can set priority coverage on the enrollment event rule for default benefits. Use the Coverage Rules tab of the Edit Enrollment Event Rule task. See

		Create Enrollment Event Rules on page 1349.
	Do you need to update dependencies across plans?	If you set up new plans, update the cross-plan rules using the effective date for when the new plans take effect. Use these tasks: • Create Cross Plan Enrollment Prerequisites on page 1382 • Create Cross Plan Insurance Coverage Maximums on page 1384 • Create Cross Plan Insurance Percentage Maximums on page 1386 • Create Cross Plan Retirement Savings Plan Contribution Maximums on page 1388
	Do you have derived or nonderived coverage targets?	If you're switching from a nonderived coverage target to a derived coverage target, consider adding additional instructions for workers to select their dependents before selecting plans. See Set Up Benefit Enrollment Instructions on page 1253. Adding these instructions can prevent an employee's coverage from accidentally changing to employee-only because they didn't select any dependents.
	What are the latest IRS HSA and FSA limits?	Add limits to your plans. If the IRS has changed the HSA and FSA limits, update your existing plan with the new limits. See Create Health Savings Account Plans on page 1306 and Create Spending Account Plans on page 1310. Review deduction codes with Payroll to that make sure the HSA and FSA limits are correct, so deductions stop at the limit.
Pay Period Schedules	Are you offering flexible spending or health savings accounts?	Verify the setup of your pay period schedule for the new benefit year to ensure that the FSA and HSA plans calculate deductions correctly.

		To set up your pay period schedule, contact your payroll administrator.
Analytics	Do you want to add embedded analytics?	You can embed custom reports as step-related worklets in the open enrollment process so that you can provide relevant report information to your workers during enrollment. You can add worklets from the related actions menu of the Change Benefits for Open Enrollment business process.
Launching Open Enrollment	How do you want your employees to enter the open enrollment workflow?	With the Configure Announcements task, you can create an open enrollment announcement on their Home page. See ../../../manage-workday/tenant-configuration/navigation/tar1438106772604.dita. Workers can enter the open enrollment flow directly from the task in My Tasks or from the announcement.
Integrations	Do you need to create new or update existing integrations for the upcoming year?	For new integrations, check the Cloud Connect for Benefits catalog for an existing integration for the provider. Plan carefully and give yourself plenty of time to set up and test the integration with the provider.

Recommendations

Consideration	Recommendations
Enrollment Instructions	Create or update open enrollment instructions using the Maintain Enrollment Instructions task. • Consider creating a separate set of instructions restricted to an open enrollment event type and benefit group. Workday doesn't use effective dating for instructions. Any text changes take effect immediately and can affect other benefit event types. • You can configure questions, responses, and instructions for employee and dependent Tobacco Use. • You can use rich-text features to enhance your instructions. Workday recommends that you reduce the use of bold, italics,

Consideration	Recommendations
	and color to avoid distracting workers from reading all required content.
Testing	Give yourself enough time to test your open enrollment configuration thoroughly in a nonproduction environment. Test all areas thoroughly before moving the changes to a production tenant, including: • Eligibility rules and benefit groups. Make sure that your benefit groups are mutually exclusive. • Elections that you carry forward. • Coverage and deduction dates. • Rates and credits. • Contribution limits. • Benefit defaults. • Payroll deductions. • Remaining pay period deductions. Disable email notifications in the testing environment. Consider moving your tested configuration from the nonproduction tenant to your production tenant a few weeks before initiating open enrollment. This period gives you time to refresh the nonproduction tenant with the changes you made to the production setup. You can then test those changes before initiating open enrollment for all workers.

Requirements

Review the Workday Community: Open Enrollment Checklist. The checklist helps you verify that you have made all new and updated changes. It can help with your questions before you begin setup.

Verify that you have access to configure all external URLs that you require during open enrollment.

Limitations

Avoid making any benefit configuration changes after you initiate open enrollment. Most changes won't take effect, however, additionally, some might cause errors that prevent workers from enrolling. If you need to correct your benefit configuration after you initiate open enrollment, you might need to cancel and reinitiate open enrollment.

Tenant Setup

In the Edit Tenant Setup - HCM task, you can:

- Select the Enable Mobile Benefits check box to enable the open enrollment on the Workday Benefits mobile app.
- Select the Disable Emergency Contact, Dependent, and Beneficiary Linking check box.

  Note: Selecting this check box prevents changes to a linked relationship from overriding beneficiaries or dependents when the person has more than 1 role.

See Reference: Edit Tenant Setup - HCM.

Security

Domains	Considerations
Set Up: Tenant Setup - HCM in the Systems functional area.	Enables the administrator to enable or disable benefit configuration options in the Edit Tenant Setup - HCM task, including enabling enrollment events on the Workday mobile app.
Set Up: Benefits in the Benefits (Systems) functional area.	Enables the administrator to access open enrollment setup tasks.
Worker Data: Benefit Eligibility in the Benefits and Personal Data functional areas.	Enables the administrator to access the Benefits Eligibility by Worker report.
Worker Data: Benefits in the Benefits and Personal Data functional areas.	Enables the administrator to manage worker's benefit elections, including access to the Benefits tab on the worker profile.
Worker Data: Insurance Calculated Coverage in the Core Compensation functional area.	Gives the administrator access to the Calculated Coverage report field. Administrators can view individual worker's calculated coverage amounts for the plans they enroll in.
Self Service: Benefits in the Benefits functional area.	Enables employees to complete benefit elections

Business Processes

Configure the *Change Benefits for Open Enrollment* business process for the open enrollment work flow. You can add worklets for embedded analytics to business process steps, providing links to additional information.

Note: Ensure that you set up the worklets on this business process when using the redesigned Open Enrollment workflow. (Previously, you could set the worklets up on the Change Benefits for Life Event business process only.)

Reporting

Workday delivers these reports to help you prepare for and manage open enrollment:

Report	Description
Active and Completed Open Enrollment Status Report	Use this report to view and manage the status of active and completed enrollment election events. This report provides more detail than the Open Enrollment Status Report, but can take a long time to run. Workday recommends that you limit your use to managing enrollment elections *after* finalizing open enrollment events.
Benefit Corrections in Progress Audit	Use this report to view a list of benefit corrections that you've started, but not yet submitted.
Benefits Eligibility by Benefit Group	Use this report to view future-dated benefits groups. Run for each benefit group using the open enrollment event date. Compare the reports to ensure that no workers exist in more than 1 group.

Report	Description
Benefit Events Status Report	Use this report to view workers with benefit events and the status of those events.
Finalize Open Benefit Events	Use this task to clean up all outdated enrollment events.
Manage Evidence of Insurability Status	Use this task to clean up all outdated EOI requests.
Open Enrollment Status Report	Use this report before finalizing enrollment to view: • Workers with open enrollment events. • The status of the open events. This report provides better performance than the Active and Completed Open Enrollment Status Report.
Terminated Employees Eligible for Benefits	Use this report to view the terminated employees that can still receive benefits.
View Benefit Eligibility Rule Results	Use this report to troubleshoot to see why someone is or isn't meeting an eligibility rule.
View Workers in Multiple Benefit Groups Audit	Use this job to view workers eligible for more than 1 benefit group so that you can troubleshoot this issue. Don't use for future-dated benefit groups.
Workers for Benefit Group by Most Recent Benefit Event	Use this RDS to create a custom report that audits benefit enrollment data.
Workers no Longer Eligible for Open Enrollment	View workers who aren't eligible for benefits but currently have an open enrollment event.

Integrations

Before you set up a new benefit plan, consider if your plan will require an integration between Workday and the benefits provider. Careful planning is essential during open enrollment to ensure proper configuration and testing of benefit provider integrations. See Concept: Open Enrollment Integration Checklist.

Give yourself a lot of lead time for testing a new integration.

When using a new benefit provider, first check the Cloud Connect for Benefits catalog. The new provider might be in the network.

Ensure that you understand the time line and responsibilities, which can vary based on whether:

- The provider is already in the network.
- The provider is new to the Cloud Connect for Benefits catalog.

Don't change the name of an existing benefit plan or provider when creating new plans or providers. These changes impact current integrations and benefit enrollment history.

Ask your providers whether they've changed any benefit plan codes for the new plan year. You need to update your integration maps with any changes.

When you offer a new benefit plan with the same provider, link the plan to your existing integration. Likewise, if you discontinue a plan, remove the integration link.

Include payroll balances. Actual contribution amounts are only available to Cloud Connect for Benefits integrations from Workday Payroll. If you use a third-party payroll provider, benefit integrations send estimated amounts based on the benefit plan setup.

Maintain benefit provider integration maps to specify how values in Workday map to values in an external endpoint.

Connections and Touchpoints

Benefits open enrollment interacts with Payroll for plan-related deductions.

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

Setup Considerations: Benefits for Mergers and Acquisitions on page 1238

Concept: Cloud Connect for Benefits

Concept: Planning a Benefit Provider Integration

Concept: Open Enrollment Integration Checklist

Tasks

Steps: Set Up Employee Benefit Plans on page 1288

Steps: Set Up Benefit Provider Integration

Concept: Hiding Benefit Plans from Configuration Prompts on page 1318

Create Benefit Plan Year Definitions on page 1418

Create Enrollment Events on page 1343

Link Benefit Plans to Integration Systems

Include Payroll Balances in Benefits Integration

Change Benefit Provider Integration Maps

Add Home and Dashboard Announcements

Reference

The Next Level: Open Enrollment Overview and Integrations

Open Enrollment Considerations for CCB

2022R1: What's New Post: Benefit Election Decision Support

Examples

Example: Add Expanded Details for Medical Plans on page 1320

Steps: Set Up Open Enrollment

Prerequisites

Set up benefits and benefit plans.

Context

Before creating and opening an enrollment event, enable mobile access, update business processes, verify eligibility for benefit groups, and assign rates.

Steps

1. (Optional) Enable open enrollment on the Workday mobile application:
    a) Access the Edit Tenant Setup- HCM task to enable Open Enrollment on the Workday mobile app.

       See Reference: Edit Tenant Setup - HCM. Enabling the mobile app also enables the Benefits worklet during an active Open Enrollment period.
    b) Access the Maintain Benefit Coverage Types task to map Workday-provided icons to coverage types. These icons display during an open enrollment event in the Workday mobile app.

    Security: *Set Up: Tenant Setup - HCM* in the Systems functional area.
2. Configure the *Change Benefits for Open Enrollment* business process.

    You can add step-related worklets with the Business Process > Maintain Step Related Worklets related action on the Change Benefits for Open Enrollment task. Base the worklets on these values:

    - Worker
    - Event Date
    - Enrollment Event

    See Reference: Embedded Analytics for HCM on page 2971.

    Consider adding a step delay for new hires that have a start date during or after the open enrollment event.
3. Review the Workday Community: Open Enrollment Checklist.
4. Access the Benefits Eligibility by Worker report.

    You can verify that eligibility rules are correct by checking the plans that a worker is eligible for.

    Security: *Worker Data: Benefit Eligibility* in the Benefits functional area.
5. Access the Benefits Eligibility by Benefit Group report.

    You can verify that eligibility rules are correct by checking the plans that workers within a specific benefit group are eligible for. Be sure to use the effective date for open enrollment.

    Security: *Manage: Benefits for Organizations* in the Benefits functional area.
6. Access the View Workers in Multiple Benefit Groups Audit report.

    Employees can only be eligible for 1 benefit group.

    Security: *Set Up: Benefits* in the Benefits functional area.
7. Create Benefit Plan Year Definitions on page 1418.
8. Assign benefit annual rates to employees.

    Select Benefits > Change Benefits Annual Rate from the related actions menu of the employee.
9. Set Up Decision Support for Medical Plans on page 1294.

    Create peer group data, based on demographic characteristics that you configure, so that workers can see which medical plans their peers selected in the previous open enrollment event.
10. (Optional) Designate or remove the spouse of an employee in Quebec as an irrevocable beneficiary using these tasks.

    - Add Beneficiary
    - Edit Beneficiary

    Employees can see their spouse listed as an irrevocable beneficiary of any employee insurance plan they select during benefit enrollment.

    See Concept: Irrevocable Beneficiaries for Quebec on page 1431.

    Security: *Worker Data: Irrevocable Beneficiaries* domain in the Benefits functional area.

11. (Optional) Create an enrollment announcement to display on the Home page. Your employees can launch open enrollment from the announcement in addition to the notification in My Tasks.
12. Turn off email notifications when testing the Open Enrollment process in your nonproduction tenant.

Related Information

Tasks

Steps: Set Up Workday Mobile Applications

Reference

Reference: Edit Tenant Setup - HCM

Workday 31 What's New Post: Benefits on Mobile

Steps: Manage Open Enrollment

Prerequisites

- Set up open enrollment.
- Review the Workday Community: Open Enrollment Checklist.
- Security: These domains in the Benefits functional area:
  - *Process: Open Enrollment*
  - *Manage: Benefits for Organizations*

Context

You can start open enrollment and then use the Open Enrollment Status Report and the Active and Completed Open Enrollment Status Report to:

- Add or remove employees to or from open enrollment.
- Send open enrollment reminders to employees.
- Extend, cancel, close, schedule to close, finalize, or rescind open enrollment.

Steps

1. (Optional) Determine if your event is large enough that you need to work with the Workday Production Readiness team.

   See Workday Community: Best Practices for Large Customer Events for guidelines about opening a Production Readiness case.
2. Start Open Enrollment on page 1419.

   You can initiate open enrollment immediately, or schedule an initiation date.
3. Enter employee benefit elections.

   Workday sends a notification to the role assigned to the *Change Benefits for Open Enrollment* business process. A Benefit Administrator or Partner can also use the Open Enrollment Status Report to enter employee elections.
4. Add Employees to Open Enrollment on page 1420.

   If an employee becomes eligible for open enrollment after it has started, you can still add the employee to open enrollment. You can add the employee after open enrollment has closed.
5. Remove Employees from Open Enrollment on page 1421.

   If an employee ceases to be eligible for an open enrollment event after it has started, you can remove that employee from open enrollment.

6. (Optional) Send Open Enrollment Reminders to Employees on page 1423.

   When you initiate open enrollment, Workday automatically sends notifications to all employees. During open enrollment, you can send notifications to either:

   - All participating employees
   - Employees with specific open enrollment status.
7. (Optional) Extend open enrollment.

   As long as open enrollment hasn't closed, you can change the end date to be later than originally set.

   Access the Open Enrollment Status Report, click View Details for the event, select Open Enrollment > Extend Open Enrollment as a related action, and set the End date.
8. (Optional) Cancel open enrollment.

   If you created an open enrollment event in error, you can cancel it.

   a. Access the Open Enrollment Status Report.
   b. Click View Details for the event.
   c. From the related actions menu for View Details, select Open Enrollment > Cancel Open Enrollment.
9. Close Open Enrollment on page 1424.

   Even though you specify a closing date for open enrollment, you must manually close open enrollment or close it by scheduling a closing date.

   Note: If you close your open enrollment on a Friday, Workday strongly recommends that you inform your employees that Workday is unavailable on Friday evenings for weekly updates. See the Workday Community: Event Calendar for details of scheduled outages.
10. Finalize Open Enrollment Elections on page 1425.

    You can enforce default benefit elections for employees who haven't submitted their benefit elections by the close of open enrollment.
11. (Optional) Reopen Open Enrollment.

    You can reopen an individual employee's open enrollment event after it's in the Closed or Finalized status.
12. (Optional) Rescind an open enrollment event for an individual employee.

    Access the employee's Workday profile. From the related actions menu, select Benefits > Benefits Election History.

    Locate the correct open enrollment event. From the related actions menu in the Event column, select Busines Process > Rescind.
13. (Optional) Rescind open enrollment.

    If you created an open enrollment in error, you can rescind the entire open enrollment after you've finalized it.

    Note: This action rescinds the enrollment event for all employees in the open enrollment. You can't reverse this action.

    To rescind the entire open enrollment event, access the Active and Completed Open Enrollment Status report. Click View Details for the event. From the related actions menu, select Open Enrollment > Rescind Open Enrollment.

14. (Optional) Correct an Employee's Open Enrollment Elections on page 1428.

    You can change an employee's benefit elections when open enrollment is:

    - Open
    - Closed
    - Finalized

    Note: Don't edit employee elections after you've sent their election information to the benefit providers or third-party payroll vendors.

Related Information

Concepts

Concept: Best Practices for All Large-Scale Events

Concept: Benefits Enrollment Events on Mobile on page 1429

Tasks

Create Enrollment Events on page 1343

Reference

Reference: Event-Specific Best Practices

FAQ: Open Enrollment on page 1431

Create Benefit Plan Year Definitions

Prerequisites

Security: *Set Up: Benefits* domain in the Benefits functional area.

Context

Define the collection of benefit plans that are offering during a given year or other plan period. Workers can only enroll in benefit plans that are part of the current benefit plan year.

Best Practice: You can hide benefit plans that you don't offer to avoid adding them to the benefit plan year. You can edit these plans and select the Do Not Use check box.

Steps

1. Access the Create Benefit Plan Year Definition task.
2. Specify the benefit plan year start and end dates:

Option	Description
Start Date	Enrollment in benefit plans can begin on this date. The effective date for benefit plans available in this benefit plan year definition must be earlier than or equal to this date.
End Date	Enrollment in the benefit plans terminates on this date.

   For benefit plans with enrollments that are ongoing, define a separate benefit plan year that has a December 31, 2099 end date. Example: retirement savings plans.

   Note: Changing these dates might impact your employees' current benefit enrollments.

   Don't add a benefit plan with an effective date later than the start date of the benefit plan year. Instead, create a new benefit plan year definition and run an open enrollment for that plan.

3. Add the plans that are valid for the plan year.

Next Steps

You can:

- Change the plan year definition with the Edit Benefit Plan Year Definition task.
- Run the View Benefit Plan Year Definition report to see the benefit plans included in a plan year definition.

Related Information
Tasks
Steps: Set Up Benefits on page 1237
Steps: Set Up Open Enrollment on page 1414
Concept: Hiding Benefit Plans from Configuration Prompts on page 1318
Reference
2022R1 What's New Post: Hide Benefit Plans

Start Open Enrollment

Prerequisites

- Set up open enrollment.
- Security: *Process: Open Enrollment* in the Benefits functional area.

Context

You can start and manage the event by benefit group.

Note: Avoid any benefit configuration changes after you start open enrollment. While most changes won't take effect, some might cause errors that prevent employees from enrolling. If you must make a change, you most likely need to cancel and then reinitiate the open enrollment.

Steps

1. Access the Initiate Open Enrollment task.
2. Select whether to initiate open enrollment now or at a later date from the Run Frequency prompt. As you complete this task, consider:

Option	Description
Initiated On	Automatically populates the current date.
Open Until	The closing date for open enrollment. Note: If you close your open enrollment on a Friday, Workday recommends that you inform your employees that Workday is unavailable on Friday evenings due to weekly updates.
Event Date	The date you want the elections to take effect. Note: Verify that you select the correct effective date because you can't change it after you initiate open enrollment.
Exclude Workers in Waiting Period or Without Eligible Plans	Select this check box to exclude employees in a waiting period from an earlier enrollment event or that aren't eligible for any plans. Workday excludes employees in a waiting period when:

Option	Description
	• The waiting period end date is after the open enrollment event date. • The coverage types in the earlier event and the open enrollment match.

Result

Workday:

- Displays benefit plan mapping.
- Displays Eligible Workers.
- Coordinates how Workday processes multiple benefit events.
- Coordinates how Workday processes benefit events occurring on the same day.
- Sends a notification to the employee or the benefits administrator so that benefit elections can begin.
- Initiates open enrollment immediately or on the scheduled date.
- Adds scheduled initiation events to the Active Schedules: Initiate Open Enrollment tab of the Open Enrollment Status Report report.

Next Steps

To see differences between an employee's current and past benefit elections, run the Benefit Changes report.

To delete an active open enrollment initiation schedule, run the Open Enrollment Status Report. From the related actions menu of the schedule, select Scheduled Future Process > Suspend. You can then delete the schedule. Alternatively, select Scheduled Future Process > Run Now to initiate the event immediately.

Related Information

Concepts

Setup Considerations: Open Enrollment on page 1406

Concept: Enrollment Status Indicators on page 1429

Tasks

Steps: Set Up Open Enrollment on page 1414

Correct an Employee's Open Enrollment Elections on page 1428

Reference

2022R2 What's New Post: Open Enrollment Scheduling

Add Employees to Open Enrollment

Prerequisites

Start open enrollment.

Context

You can add employees to an open enrollment if they become eligible after the event has started or closed. Example: The employee is a new hire or recently moved into an eligible organization.

To find employees who can be added to open enrollment, access the Eligible Workers with no Open Enrollment report.

Steps

1. On the Open Enrollment Status Report, click View Details for the open enrollment to which you want to add the employee.

2. On the Open Enrollment Details View page, select Open Enrollment > Add Workers from the related actions menu of the open enrollment event.
3. On the Add Workers to Open Enrollment task, select the employee to add to the open enrollment event from the Eligible Workers prompt.

   You can add only the employees that are eligible for this open enrollment event and aren't already participating.
4. Specify an Open Until date to give the employees time to complete their open enrollment.

   Using the Open Until date prevents the open enrollment event from automatically closing for the added employees.

Next Steps

Manually close and finalize the open enrollment event for the added workers.

Related Information
Tasks
Close Open Enrollment on page 1424
Examples
Concept: Enrollment Status Indicators on page 1429

Remove Employees from Open Enrollment

Prerequisites

Find employees who were originally included in open enrollment but have since lost eligibility by running the Workers no longer eligible for Open Enrollment report.

Note: Coordination of Events handles most of these situations. Example: If open enrollment started on 11/1 and an employee is terminated on 11/5, Coordination of Events automatically cancels the open enrollment event for the employee after their termination is complete.

Context

If an employee ceases being eligible for an open enrollment event after it has started, you can remove that employee from the open enrollment. Example: The employee was terminated or transferred into an ineligible organization.

The only employees automatically included in open enrollment are those eligible at the time of the open enrollment.

Note: You can remove any employee from open enrollment, even if eligibility hasn't changed.

Steps

1. On the Open Enrollment Status Report, click a number in the Not Started, In Progress, or Submitted columns.

   Workday displays all the employees of that status for that particular open enrollment event.
2. Select Benefits > Cancel Enrollment from the related action of the employee's Employee Enrollment Event.

Result

The employee removed from open enrollment now has no open enrollment elections.

Send Benefits Messages

Prerequisites

Set up Benefits Messaging. See Steps: Set Up Benefits Messaging.

For workers to receive:

- An email, the recipient must have a work email address.
- A push notification, the recipient must be a Workday user.
- SMS messages, the recipient must have opted in to SMS texting on a mobile phone number.

Context

You can send employees ad-hoc messages related to their benefits through email, SMS, and push notifications.

Steps

1. Access the Send Benefits Messages task.

   As you complete the task, consider:

Option	Description
Workers	Select the workers to whom you wish to send a message. If you rerouted to this task from the Send Open Enrollment Reminders action, this field populates with the workers you already selected.
Contact Method	Select notification options for the message. This selection determines the message fields that Workday displays in the task. This field populates based on the Notification Routing Rule you create for the Benefits Notifications category. If you rerouted to this task from the Send Open Enrollment Reminders action, this field populates based on the delivery channels enabled from the Open Enrollment for Benefits notification type.
Email Branding	(Optional) Select a notification template you created for the Benefits Notifications notification type. If you rerouted to this task from the Send Open Enrollment Reminders action, select a notification template you created for the Open Enrollment for Benefits notification type.
Message Template	(Optional) Select a message template you created for the Benefits Notifications notification type. If you rerouted to this task from the Send Open Enrollment Reminders action, select a message template you created for the Open Enrollment for Benefits notification type.

Option	Description
(Email) From Display Name and Reply To	(Optional) Enter your desired display name and reply to email, if different from the information listed under From.
Message	For SMS messages, Workday recommends limiting content in this field to 160 characters.

2. (Optional) Select the Review Recipients button.

   See which workers you've selected have enabled the communication channels you wish to send your benefits message through.
3. Click Send Message.

Result

Selected employees receive a branded email, SMS message, or push notification relaying information related to their benefits, or open enrollment reminders

Example

Related Information

Concepts

2024R2 Feature Release Note: Benefits Messaging

Tasks

Steps: Set Up Benefits Messaging on page 1259

Send Open Enrollment Reminders to Employees on page 1423

Send Open Enrollment Reminders to Employees

Prerequisites

- Enter email addresses for all the employees you want to notify. Workday first looks for the one labeled as *Work*. If Workday doesn't find a work email address, it looks for the personal email addresses.
- Security: *Manage: Benefits for Organizations* in the Benefits functional area.

Context

When you initiate open enrollment, Workday automatically sends an email to all employees. You can send open enrollment reminders at a later point with email, SMS, and mobile push notifications to all employees participating in open enrollment. You can also send reminders to employees who have a particular open enrollment status at any point during open enrollment.

Steps

1. Access the Open Enrollment Status Report.
2. Select View Details for the open enrollment for which you want to send a notice.
3. On the Open Enrollment Details View page, click the Actions button and select Send Open Enrollment Reminders.
4. Enter the criteria by which Workday determines which employees receive the email.

Option	Description
On Hold	Available when the enrollment status is *Closed*, *In Progress*, or *Not Started*.

Option	Description
	Select this check box if you want to target employees that have this event placed on hold.
Start Date / End Date	Available when *Submitted* or *Finalized* is selected in the Enrollment Status field. Enter a date range that can span from the open enrollment event date to the open enrollment close date. For *Submitted*, it is the Electronic Signature Date that is compared to the date range. For *Finalized*, it is the event Finalized Date.

5. Click Create Message.

   Workday reroutes you to the Send Benefits Messages task, and carries over all selected workers. You can then select an option for these fields that you can enable for the Open Enrollment for Benefits notification type:

   - Contact Method
   - Email Branding
   - Message Template

   You can send your open enrollment reminder as an email, SMS, and mobile push notification. See Send Benefits Messages.
6. Click Send Message.

Result

Workday sends open enrollment reminders to the employees targeted by the criteria.

Related Information

Concepts

Concept: Enrollment Status Indicators on page 1429

Tasks

Send Benefits Messages on page 1422

Close Open Enrollment

Prerequisites

Start open enrollment.

Context

You manually close open enrollment events, even if you specify a closing date for an open enrollment window. An open enrollment doesn't close automatically on the specified closing date unless you manually close it or schedule it to close.

Closing open enrollment enables you to audit and edits elections before finalizing them.

You can close open enrollment at any time.

Steps

1. Access the Open Enrollment Status Report .
2. In the Currently Active Events section, locate the event you want to close and click View Details.

3. In the Open Enrollment Processing section, select an option from the Actions menu:
    - Close Open Enrollment Now
    - Close Open Enrollment by Schedule
4. On the Close Event page, select a date for the Close Employees with Enrollments Open Until prompt to close enrollments that specify an Open Until date. Select the Close Submitted Events Only check box to close only submitted events.

    You might have given employees different Open Until dates when you added them to open enrollment. You can only close open enrollment for employees with a specific Open Until date that falls on or before the date you select.
5. (Optional) Close open enrollment by schedule.

    In the Schedule tab, select the Run Frequency and enter scheduling details. You can also finalize open enrollment immediately after it's scheduled to close by selecting the Finalize Events After Closing check box in the Open Enrollment Details tab.

Result

Employees can no longer change their benefits elections. Open enrollment notifications disappear from employees' My Tasks, and the Enroll in Benefits button disappears.

Note: After open enrollment closes, Benefits Partners and Administrators can still change employee elections.

Open enrollment closes immediately or on the scheduled date.

Workday adds scheduled closure events to the Active Schedules: Close Open Enrollment tab of the Open Enrollment Status Report report.

Depending on the status of open enrollment when you close it, Workday applies different default election values.

You might need to close and finalize open enrollment multiple times.

Next Steps

- Close open enrollment for any additional employees.
- Finalize the open enrollment elections for all employees, if you haven't already scheduled open enrollment finalization.

    Once you finalize open enrollment, all finalized elections become effective on the event date. Workers, administrators, and partners can no longer edit elections, but administrators and partners can use the Correct Benefits task to make updates to a finalized election.
- After closing and finalizing elections, run the Benefit Census report to view and record the benefit elections for all employees.
- You can use the Benefit Changes and Enrollment Count reports.

Related Information

Tasks

Set Up Default Benefits Coverage on page 1379

Reference

2022R2 What's New Post: Open Enrollment Scheduling

Finalize Open Enrollment Elections

Prerequisites

- Open enrollment has closed.
- Security: *Manage: Benefits for Organizations* in the Benefits functional area.

Context

You can enforce default benefit elections for employees who haven't submitted their elections by the close of the open enrollment window.

Steps

1. Access the Open Enrollment Status Report.
2. Select View Details on the open enrollment that you want to finalize.
3. On the Open Enrollment Details page, select Finalize Open Enrollment.
4. Finalize open enrollment by schedule.

   When closing open enrollment by schedule, select the Finalize Events After Closing check box in the Open Enrollment Details tab.

Result

After you finalize open enrollment, employees can't change their elections unless the Enable Reopen of Open Enrollment Event feature is enabled for the open enrollment event type; however, Benefits Partners and Benefit Administrators can correct an employee's open enrollment elections from the:

- Related action menu of the benefit event.
- Active and Completed Open Enrollment Status Report.

Workday:

- Automatically populates any necessary benefit elections to the employee and sets the status to *Finalized*.
- Determines whether the worker needs to provide Evidence of Insurability (EOI) based on the event rules. If the provider requires EOI, Workday starts the EOI process.
- Checks for events that have an event date following the finalized event with a status of *On Hold*. Workday cancels or rescinds that event, and creates a new event.
- Determines if an employee has a birthday or service anniversary that moves them to a new rate band before the end of the benefit plan year.

  To determine if the employee moves to a new rate band, Workday calculates if the Calculate As Of value for Health Care Rate or Insurance Rate equals *Event Date*. It then checks if the employee has a birthday or service anniversary before the end of the benefit plan year. If yes, Workday records that event in a transaction log with an event date of the birthday or service anniversary. Integrations based on the Payroll Interface Output File template process the event when payroll runs for that period.

View your events scheduled to be finalized under the *Finalize Events After Closing* column in the *Active Schedules: Close Open Enrollment* tab of the Open Enrollment Status Report.

Next Steps

To correct any enrollment elections after you finalize open enrollment, access the Active and Completed Open Enrollment Status Report.

You can access Benefit Premium Report - Health Care or Benefit Premium Report - Insurance to see a list of benefit plan costs for:

- A specific period.
- One or more benefit plans.
- A frequency.

Related Information

Concepts

Concept: Evidence of Insurability Processes on page 1455

Tasks

Reopen Open Enrollment on page 1427
Set Up Default Benefits Coverage on page 1379

Reopen Open Enrollment

Prerequisites

- Security: *Process: Open Enrollment* domain in the Benefits functional area for administrators to reopen an employee's open enrollment event.
- Create the *Reopen Open Enrollment Event* business process definition and security policy in the Benefits functional area. You can enable self-service users as well as administrators and partners to initiate the business process.
- Ensure the worker's open enrollment event is in a Closed or Finalized status.

Context

You can enable the reopening of an individual employee's open enrollment event. Once enabled, an employee can reopen their open enrollment event, or a benefits administrator can reopen it for them. This feature enables employees to resubmit closed or finalized open enrollment events within a specified time frame to make corrections to their elections, or upload required documentation.

You can't initiate the reopening of open enrollment events on mobile; however, employees can make benefit elections on mobile after the event is reopened on desktop.

Steps

1. Access the Create Open Enrollment Event Type task.

   Select the Enable Reopen of Open Enrollment check box.

   The greater the value in the Days to Enroll field, the greater the risk for the employee to have a lapse in coverage.

   To prevent lapses in coverage or discrepancies in payroll deductions, Workday recommends that you don't enable open enrollment events to be reopened past the actual open enrollment event date.
2. Access the Reopen My Open Enrollment task in the Tasks and Reports section of the Benefits and Pay Hub.

   Self-service users can access this task to reopen their open enrollment event if *Employee As Self* is allowed as an initiator on the business process security policy.
3. Access the Reopen Enrollment task from the related actions menu on the Open Enrollment Details View page.

   Benefits administrators and partners can access this task to reopen an individual employee's open enrollment event.

Result

Workday:

- Rescinds the employee's previous open enrollment event and generates a new one. The new event maintains the elections the worker last submitted.
- Updates the Submit By Date on the Reopen Open Enrollment Confirmation page to account for the value entered in the Days to Enroll field. The Submit By Date doesn't account for weekends or holidays, and only updates once the business process completes.

Example

Your original open enrollment window is 2024-01-01 to 2024-01-31, and the event date is 2024-02-28. You'd like to provide your employees an additional opportunity to reopen their open enrollment to upload documentation on their dependents. You enable the feature and, to prevent lapses in coverage and payroll discrepancies, you enter the value 27 in the Days in Reopen Period field so that employees can't request to reopen their event starting from the event date of 2024-02-28. In the Days to Enroll field, you grant employees 7 days to change their benefits after they reopen their event.

Next Steps

Create custom reports with the Open Enrollment Event is a Reopened Event report field to view open enrollment events created from a reopen event. Your custom report must use the Enrollment Events for Benefit Group data source to access this report field.

Related Information

Concepts

2024R1 What's New Post: Reopen Open Enrollment for Individual Employees

Tasks

Close Open Enrollment on page 1424

Finalize Open Enrollment Elections on page 1425

Correct an Employee's Open Enrollment Elections

Context

You can change the benefit elections an employee has made both before and after open enrollment closes.

Steps

1. Access the Open Enrollment Status Report.

   To change an employee's benefit elections *before* you finalize open enrollment, select a number in 1 of these columns:

   - Not Started
   - In Progress
   - Submitted
   - Closed With Changes
   - Closed With No Changes

   To change an employee's benefit elections *after* you finalize open enrollment, access Active and Completed Open Enrollment Status Report. Select a number in 1 of these columns.

   - Finalized with Changes
   - Finalized with No Changes

   If you have finalized open enrollment, you can also select Benefits > View Benefit Election History from the related action menu of the employee. Then select Benefits > Correct Benefits from the related action menu of the benefit event.
2. Select Edit Benefit Elections for the employee.
3. Correct the employee's benefit elections.

Next Steps

Use these reports:

- Benefit Correction In Progress Audit to see a list of employees with corrections to benefit elections in progress.
- View Benefit Elections History to see which events have had corrections made and then click the link to see the details of the correction.
- Benefit Changes to see if there are any future events that need correcting.

  Note: Check for future-dated events and manually correct those elections. Workday doesn't automatically apply these changes to future-dated events.

Concept: Benefits Enrollment Events on Mobile

You can enable Benefits on the Workday Mobile app for your employees. From the Benefits & Pay Hub, employees can:

- View their current benefits.
- Initiate benefit change requests.
- Update their elections during open enrollment or qualifying life events.
- View expanded plan details for benefit plans, when configured.

Employees can access an enrollment event from a notification in their My Tasks or the Benefits & Pay Hub, which displays the number of unstarted enrollment events. The mobile version streamlines the election process making it easy to navigate between the coverage cards on the landing page. The landing page summarizes:

- If an employee has reviewed or updated the benefit coverage options for a card.
- The status of each benefit plan: elected or waived.
- The estimated cost of selections by benefit group frequency.

Workday synchronizes between mobile and desktop sessions, enabling employees to start the enrollment event on 1 platform and continue on another.

Employees can view a summary of their recently submitted elections while an enrollment event remains open.

The Benefits & Pay Hub on the mobile app doesn't support:

- Excess credits for HSA. Workday pays the unused flex credits as cash.
- Employee and employer allocation of retirement savings across multiple providers. Employees can allocate their contributions by individual plan.
- Updates of the National ID for a covered dependent. Employees can update this field outside of the enrollment event through the Add Dependents task.

Related Information

Concepts

Concept: Enrollment Status Indicators on page 1429

Tasks

Steps: Set Up Open Enrollment on page 1414

Start Open Enrollment on page 1419

Steps: Set Up Workday Mobile Applications

Reference

Workday 31 What’s New Post: Benefits on Mobile

2023.18 What’s New Post: Mobile Life Event Enrollment

Concept: Enrollment Status Indicators

Workday displays these status indicators on the coverage cards during an election event to indicate whether the employee has reviewed or elected coverage:

- *Reviewed*: The employee selected the coverage card and returned to the landing page without electing and saving coverage.
- *Updated*: The employee selected the coverage card and saved an election that alters their coverage.

- The Mobile application doesn't display a status when an employee selects a coverage card but returns to the landing page without saving an election.
- If an employee becomes eligible for coverage with a default value of:
  - Select and selects Waive, the status displays *Reviewed* because there has been no change in coverage.
  - Waived and selects Select, the status displays *Updated*.

This example demonstrates how status indicators behave when an employee makes a change in coverage.

A new hire becomes eligible to enroll in benefits.

- They open the enrollment event, select a medical coverage card, and review the medical plans. The new hire returns to the landing page without making changes to review other coverage cards. The medical coverage card displays the *Reviewed* status because they haven't made any coverage changes.
- They select an insurance coverage card and select Elect for an insurance plan. When the new hire saves their election and returns to the landing page, the coverage card displays the *Updated* status because they have made a coverage change.
- The new hire reopens the insurance coverage card, selects Waive, and saves the change. The coverage card displays *Reviewed* because they've removed the change in coverage.

Related Information
Tasks
Start Open Enrollment on page 1419
Correct an Employee's Open Enrollment Elections on page 1428
Correct Benefits on page 1437

Concept: Integration Implications for Using Correct Benefits

The Correct Benefits related action enables you to make quick changes to employee elections before sending their data to benefit providers or third-party payroll vendors. This action can have down-stream impacts on your data.

If you make a correction to employee elections after sending their data, you must manually report any adjustments to benefit providers or third-party payroll vendors. Workday doesn't report such changes because it doesn't track the employee's previous elections.

Example:

A worker has a new hire event on March 1 and makes these benefit elections that go into effect on April 1:

- Medical with Provider A.
- Dental Plan with Provider B.
- Vision with Provider C.

The benefits administrator makes these corrections to the new hire benefit event after sending the elections data:

- Medical election waived.
- Dental election waived.
- Vision election waived.

The benefits administrator doesn't report the changes to the vendor. As a result, Workday has no record that the worker enrolled in these plans. The provider won't have the correct data for any future-dated benefit events.

The way in which you integrate Workday with a provider system determines how Correct Benefits affects provider data. If the provider replaces all data, updates resulting from Correct Benefits automatically update the provider data correctly. When the provider relies on an end date to remove coverage, Correct Benefits might not update provider data correctly because it doesn't provide an end date.

To ensure that provider records are in sync with Workday, contact your providers.

Concept: Irrevocable Beneficiaries for Quebec

For workers in Quebec, the Benefits Administrator or Partner can designate a spouse as an irrevocable beneficiary. *Additionally, when a worker designates their spouse as the primary beneficiary, Workday automatically sets the spouse as an irrevocable beneficiary.* The spouse is then listed as an irrevocable beneficiary on life insurance plans selected during benefit enrollment.

Workday enables you to create an irrevocable beneficiary, but doesn't assume responsibility for compliance. Consider:

- Only a Benefits Partner or Administrator can designate or overturn a spouse as an irrevocable beneficiary. But, a worker can affect the designation by adding their spouse as the primary beneficiary.
- A worker can have only 1 irrevocable beneficiary.
- A worker's irrevocable beneficiary is the only eligible primary beneficiary.
- An irrevocable beneficiary can't be a contingent beneficiary.

Specify the relationships that count as spousal using the Maintain Related Person Relationships task.

FAQ: Open Enrollment

- During open enrollment, why are employees enrolled in plans before making their elections? on page 1431
- During open enrollment, why aren't eligible employees automatically enrolled into the expected benefit plans? on page 1431
- Which employees are eligible for which plans in the open enrollment I'm about to start? on page 1432
- What happens to an employee who is on leave when I start open enrollment? on page 1432
- Why does Workday display a lower coverage amount for life insurance than the employee elected? on page 1432
- How do I handle workers that we hire after open enrollment closes, but before the elections take effect? on page 1432
- Why aren't the appropriate benefit plans available to employees during open enrollment? on page 1432
- How can I see the benefit elections employees made during open enrollment? on page 1432

During open enrollment, why are employees enrolled in plans before making their elections?

If you select the Auto Enroll flag of the plan, all eligible employees are automatically enrolled in the benefit plan when open enrollment starts.

To make sure that Workday doesn't automatically enroll employees in this plan:

1. Access the Edit Benefit Plan task.
2. Clear the Auto Enroll check box.

During open enrollment, why aren't eligible employees automatically enrolled into the expected benefit plans?

If you clear the Auto Enroll check box in the plan, Workday doesn't automatically enroll employees in the benefit plan when open enrollment starts.

To enroll employees automatically in this plan:

1. Access the Edit Benefit Plan task.
2. Select Auto Enroll.

Which employees are eligible for which plans in the open enrollment I'm about to start?

To determine which employees are eligible for the open enrollment after you start it, use the Benefits Eligibility report with the start date of the open enrollment window. The report lists employees by the benefit group eligible for open enrollment and benefit plans that they're eligible for, as of the start date of the planned open enrollment.

What happens to an employee who is on leave when I start open enrollment?

If eligible employees are on a leave of absence when you start open enrollment, they can make benefit elections as long as they can access Workday. Otherwise, Benefits Partners can enter elections on the employee's behalf.

Why does Workday display a lower coverage amount for life insurance than the employee elected?

During open enrollment, an employee might select a coverage amount higher than the minimum. Workday automatically sets the coverage to the amount defined by the Evidence of Insurability (EOI) rules. When the employee gets EOI approval, Workday restores the amount to the level originally specified by the employee.

How do I handle workers that we hire after open enrollment closes, but before the elections take effect?

You can enable the newly hired employee to participate in open enrollment, while enforcing any required waiting period. Complete the New Hire benefit event first and then add the employee to open enrollment.

Why aren't the appropriate benefit plans available to employees during open enrollment?

The most likely reasons are:

- You haven't added benefit plan to the benefit plan year definition. Access the Edit Benefit Plan Year Definition task and select the benefit plans that you want employees to select.
- You haven't added the employee's benefit group to the benefit plan. Access the Edit Benefit Plan task and add the benefit groups to which the employees belong to the Benefit Rates and Eligibility table.

How can I see the benefit elections employees made during open enrollment?

After finalizing open enrollment, you can see the benefit elections by running the Benefit Census report.

Benefit Changes

Change Benefit Elections

Prerequisites

- Assign benefit annual rates to employees.
- Security: *Worker Data: Benefits Annual Rate* in the Benefits functional area.

Context

Employees or administrators use the Change Benefit task when an event occurs that qualifies the employee to change their benefit elections. The benefits that an employee is eligible to enroll in depend on the specific benefit event that has occurred. Administrators can use the *Change Benefits* web service to bulk load multiple benefit changes.

Note: Because administrators use the Change Benefits web service for loading data, the web service completes processing automatically, even if you specify manual processing.

Steps

1. Access the Change Benefits task.
2. Select the Benefit Event Type.
3. Enter the Benefit Event Date.

   Workday:

   - Automatically calculates the Submit Elections By date using the days to enroll associated with the enrollment event type.
   - Displays the benefit plans for which the employee can change elections, based on the enrollment event rules.
   - Automatically calculates the Coverage targets if you select the Derived Coverage Targets check box.

Result

- Workday sends a Change Benefits notification to the employee or administrator.
- The employee or administrator enters new benefit elections. If the benefit elections automatically finalize when submitted, then Workday:
  - Determines whether Evidence of Insurability (EOI) is required based on the event rules. If required, Workday starts the EOI process.
  - Checks for events in progress or on hold that could conflict with this event.
  - Checks:
    - If a health care or insurance election uses a banded rate table based on age or length of service.
    - For a birthday or service anniversary that moves the employee into another rate band before the end of the benefit plan year.
  - Logs the event with an event date equal to the birthday or service anniversary, if both:
    - The date entered in the Calculate As Of field for Health Care or Insurance Rate equals *Event Date*
    - The employee has a birthday or service anniversary before the end of the benefit plan year.

  Integrations based on the Payroll Interface Output File template process the event when payroll runs for that period.
- You can view the Benefit Election History on the worker profile.

Next Steps

To delete the benefits annual rate and history for an employee permanently, access the Remove Benefits Annual Rate task.

To see differences between the current and past benefit elections, use the Benefit Changes report. In this report, the Election Status for All Effective Dates report field subfilter displays status by display order for elected and waived elections. The report field filters out future elections, while displaying current, previous, and historical elections. If 1 election meets 2 status conditions, Workday displays the first status in the displayed order.

You can set up Workday to determine if a specific staffing, position, or compensation event affects an employee's benefit coverage.

For compensation changes that impact benefits, you can use the *Change Benefit Election for Compensation Changes* action step in these business processes:

- Propose Compensation Change.
- Propose Compensation Hire.
- Request Compensation Change.
- Request Employee Merit Adjustment.
- Initiate Compensation Review Process. For this business process only, set up the step as a batch/ job step. (Security: Set Up: Benefits domain in the Benefits area).

Related Information

Concepts

Concept: Benefits Enrollment Events on Mobile on page 1429

Concept: Change Benefits Web Services on page 1438

Concept: Enrollment Status Indicators on page 1429

Reference

Reference: Election Status for All Effective Dates on page 1440

The Next Level: Fireside Chat: How COVID-19 Impacts Benefits

2020R1 What’s New Post: Enrollment Events Redesign

2020R1 What’s New Post: Compensation Changes and Calculated Coverage Impact

Change Retirement Savings Elections

Prerequisites

- Create retirement savings plans.
- Security: These domains in the Benefits functional area:
  - *Set Up: Benefits*.
  - *Set Up Benefits: Retirement Savings Allocation Across Multiple Providers*.

Context

Employees or administrators use the Change Retirement Savings Elections task when an event occurs that qualifies the employee to change their retirement savings elections.

Steps

1. Access the Retirement Savings Elections report.

   You can also access Benefits > Change Retirement Savings from the related action of the worker.
2. For coverage types that enable workers to allocate employee or employer contributions to more than 1 benefit plan, consider:

Option	Description
Contribution Type	Displays if you set up the plan to have an employee contribution. Enter a contribution percent or amount. The amount must be within the applicable minimum and maximum contribution set up on the plan.

Option	Description
Employee Contribution Allocation	Specifies the employee contribution amount.
Employer Contribution Allocation	Displays if there's any employer contribution set up for the plan. Enter the portion as a percentage of the employer contribution to allocate to the plan. The total allocation must equal 100%. Example: The employer contributes 2000 USD to a retirement savings coverage type and that they can distribute among 3 plans. You can enter 30% to plan A, 20% to plan B, and 50% to plan C.

3. For coverage types that don't allow allocation of employee or employer contributions to more than 1 benefit plan, consider:

Option	Description
Employee Contribution	Enter a contribution percent or amount. The amount must be within any applicable minimum and maximum contribution defined on the plan.
Employer Contribution	Displays if there's any employer contribution defined for the plan and is view-only.
Auto Contribution Increase	For percentage contributions only. Enable workers to contribute automatically to the retirement plan. Workers can opt out.

4. Enter beneficiaries.

Next Steps

To see differences between an employee's current and past benefit elections, use the Benefit Changes report.

Related Information

Tasks

Create Retirement Savings Plans on page 1302

Reference

Reference: Health Savings and Spending Accounts Enrollment Options on page 1321

Finalize Open Benefit Event Elections

Prerequisites

Security: *Manage: Benefits for Organizations* in the Benefits functional area.

Context

You can finalize the benefit elections for employees who haven't submitted their benefit elections in time. When you finalize elections for employees who have missed the deadline, Workday elects the default benefits for the employee. You can finalize the elections manually, or set up schedules for Workday to finalize unsubmitted benefit elections automatically. You can create multiple schedules that finalize events for different benefit groups.

Steps

1. Access the Finalize Open Benefit Events task.
2. Select whether to run the task once manually, or run the task on a regular schedule.

   Select Daily Recurrence or Weekly Recurrence to schedule how often Workday automatically finalizes the open benefit events.
3. As you complete the Schedule Finalize Open Benefits Events tab, consider:

Option	Description
Benefit Groups	Select 1 or more groups with members affected by the open benefits event.
Generate Preview Alerts	Add 1 or more preview alerts to remind your employees that the event deadline is approaching or has passed. The preview alert is based on the benefit event date. You can send preview alerts until you finalize the enrollment event.

4. As you complete the Schedule tab, consider:

Option	Description
Daily Recurrence	Select every weekday or the number of days between each run. Example: Enter 1 to run everyday.
Weekly Recurrence	Select: • How often you want to run the task. Example: Every 3 weeks. • The weekdays you want the task to run on. • Which time zone to use. Workday uses the current date within the selected time zone to determine which events have passed their Submit By date.

Result

Workday:

- Automatically populates any default benefit elections to the employee and sets the status to *Finalized*.
- Determines whether employees need to provide Evidence of Insurability (EOI) based on the event rules. If so, Workday starts the EOI process.
- Checks for events that have an event date with a status of *On Hold* following the event being finalized. If Workday finds events, it cancels or rescinds them and creates new events.

- Determines whether to apply a new rate band before the end of the benefit plan year. Birthdays and service anniversaries can trigger changes for plans that use banded rate tables based on age or length of service. Workday:
    - Compares the *Event Date* with the Calculate As Of field on the Health Care or Insurance Rate tasks.
    - Changes the employee's rate band if both are true:
        - The 2 dates have equal values.
        - The employee has a birthday or service anniversary before the end of the current benefit plan year.
    - Records the event in the transaction log.
        - Workday uses the event to charge the rate at the appropriate time.
        - Integrations based on the *Payroll Interface Output File* template process the event during the period that includes the event date.

Next Steps

View benefit plan costs for a specific time period, 1 or more benefit plans, or a frequency using:

- Benefit Premium Report - Health Care
- Benefit Premium Report - Insurance

Related Information

Concepts

Concept: Evidence of Insurability Processes on page 1455

Tasks

Set Up Default Benefits Coverage on page 1379

Reference

Workday 31 What's New Post: Automatically Finalize Open Benefit Events

Correct Benefits

Prerequisites

Security: *Manage: Benefits for Organizations* in the Benefits functional area.

Context

You can change an employee's benefit elections after the event is *closed* or *finalized*. This includes events created by open enrollment, the Change Benefits task, and passive events.

Steps

1. Select Benefits > View Benefit Election History from the employee's related actions menu.
2. Select Benefits > Correct Benefits from the related actions menu of the benefit event.
3. Change the benefit elections.

Result

When you click Submit, Workday:

- Retains a copy of the old benefit elections.
- Sends the changes to the Workday Benefits Network, Payroll Interface, or Workday Payroll.

Next Steps

Use the:

- Benefit Corrections In Progress Audit to see a list of employees with corrections to benefit elections in progress. If you corrected an employee's benefit elections, but that correction isn't appearing on the benefits page in their profile, run this audit to ensure the correction isn't still in progress.
- Benefit Election History tab to see which events have had corrections made, then click the link to see the details of the correction.

Note: Manually correct future-dated election events. Workday doesn't automatically apply these changes to future dated events.

Related Information

Concepts

Concept: Enrollment Status Indicators on page 1429

Tasks

Correct Benefits on page 1437

Extend Benefits Coverage for an Individual Employee

Context

You can extend benefit coverage beyond the Workday-calculated end date for an event and coverage type.

Workday uses the End Date associated with an event and coverage type on the Create Enrollment Event Rule task to calculate the last day of coverage. If there’s a grace period associated with the event, Workday adds the grace period to the end date to determine the last day of coverage.

You can extend benefits only to employees that are losing eligibility for the benefit plan.

You can't extend benefits for an event if an employee has another enrollment event that falls at a later date. If necessary, you can rescind the later event and then extend lost benefits from the earlier event.

You can't extend benefits beyond the current benefit plan year for a terminated employee. Workday lets you select a coverage end date in a future plan year. But, it drops their coverage at the end of the current plan year. To avoid dropping the terminated worker's coverage, work directly with your benefit provider.

Steps

1. Select Benefits > View Benefits Election History from the employee's related actions menu.
2. Select Benefits > Extend Benefits Coverage from the related actions menu of the benefit event.

   This related action displays for *Finalized* benefit events, but Extend Coverage to Date is available only for terminated coverages.
3. In the Extend Coverage to Date column, enter a new coverage end date for the benefits you want to extend.

   The Extend Benefits Coverage task is available as a related action for all benefit events. However, the Extend Coverage to Date field is editable only where a benefit has an end date.

Related Information

Tasks

Create Enrollment Event Rules on page 1349

Reference

The Next Level: Fireside Chat: How COVID-19 Impacts Benefits

Concept: Change Benefits Web Services

Workday provides 2 web services that load mass changes for benefits elections:

- *Change Benefits*
- *Bulk Import Change Benefits*

Change Benefits Web Service

The *Change Benefits* web service is the older of the 2 web services and performs bulk uploads. It enables you to initiate and complete the *Change Benefits for Life Event* business process to generate benefit transactions for employees. The web service ignores any additional steps that you've configured on the *Change Benefits for Life Event* business process.

This web service is for mass uploads from an external system. We don't recommend that you use this web service for incremental benefit updates from a third-party benefits administration system. The web service works by waiving all of the worker benefits elections that match a specific benefit event type. It then replaces them with the benefit elections that you specify on the web service call. The purpose of the web service is to load benefits for an initial conversion or acquisition only. It doesn't participate in coordination of events, and if you load benefits out of order employees could have incorrect elections in Workday.

Bulk Import Change Benefits Web Service

The *Bulk Import Change Benefits* web service provides the same function as *Change Benefits*. However, it's more efficient and faster if loading very large volumes of data. The web service also provides a request ID so that you can track the request through the process monitor.

While this web service has a significant performance improvement, you can't specify processing order for multiple events for the same worker. If you need to submit multiple events for a worker in a particular order, you can either:

- Submit 1 template for each event.
- Use the *Change Benefits* web service.

How Should I Use These Web Services?

These web services upload large numbers of benefits elections. One of the required fields in the web service is the Benefit Event Type. This value lets the web services know which plans it can update.

Based on the request, the web services replace benefits for the specified event type with the benefits in the web service call. Essentially, they overwrite all plans for the benefit event type with the new plans on the request.

To avoid impacting elections that aren't part of an update, Workday recommends that you use a separate benefit event type for each request. Each request should contain only the benefits that you need to update. Example: Avoid using a general benefit event type like Admin Correction. The web service removes all benefits associated with that event type, before adding the plans on the request.

You can waive a benefit election by excluding replacement elections for the benefit coverage types in the event.

Supported Benefit Types

The *Change Benefits* and *Bulk Import Change Benefits* web services support these benefit types:

- Health Care
- Heath Savings Account
- Spending Account
- Insurance
- Retirement Savings
- Additional Benefits

Note: If the only plan type you're loading is Retirement Savings, consider using the *Enroll in Retirement Savings* web service.

Event Date and Coverage Begin Date

The web services ignore the values for the Coverage Begin Date and Deduction Begin Date fields. Workday calculates these dates based on the enrollment event rules. However, the web service requires that you populate the Coverage Begin Date field. Deduction Begin Date is optional.

You can include a value for the Original Coverage Begin Date and Original Deduction Begin Date fields if you need to capture either:

- The original date the worker enrolled in the benefit plan.
- The date of the worker's first deduction for the plan.

The dates loaded in these fields display in the Coverage Begin Date and Deduction Begin Date report fields in the user interface. Typically you only load these values when converting data from a legacy system to capture history. When loading a change for an existing plan, administrators typically want to capture a new coverage begin date for the change.

The Request and Response

Before creating the request, ensure you have all the reference IDs for the benefits you want to modify. Examples:

- Benefit Event Type ID
- Frequency ID
- Health Care Coverage Plan ID
- Health Care Coverage Target ID

Example: If you extend coverage from *employee* to *employee + child*, you need to add the dependent in Workday with its dependent ID, otherwise your request fails.

Related Information
Tasks
Change Benefit Elections on page 1432
Correct Benefits on page 1437

Reference: Election Status for All Effective Dates

The Benefit Changes report enables you to see differences between the current and past benefit elections. You can use the Election Status for All Effective Dates report field to display the election status in the displayed order. As you use this report field, consider:

Status	Description
Future - Elected	The Coverage Begin Date is after today and the worker has elected the benefit plan.
Future - Waived	The Coverage Begin Date is after today and the worker has waived the benefit plan.
Previous - Elected	The Coverage Begin Date is before today and the worker has elected the benefit plan. Displays the election of the plan with closest coverage begin date before the current date.
Previous - Waived	The Coverage Begin Date is before today and the worker has waived the benefit plan. Displays the waived election with the closest coverage begin date before the current date.
Current - Elected	The Coverage Begin Date is on or before the current date. Displays the election with the closest

Status	Description
	coverage begin date on or before the current date, for the plan.
Current - Waived	The Coverage Begin Date is on or before the current date. Displays the waived election with the closest coverage begin date on or before the current date for the plan.
Historical - Elected	Any election without a status of *Future*, *Previous*, or *Current*.
Historical - Waived	Any waived election without a status of *Future*, *Previous*, or *Current*.

Related Information

Tasks

Change Benefit Elections on page 1432

Example: Create and Send Alerts for Benefit Changes

You can create a notification reminding employees they must complete their benefit enrollment.

Context

In this example, we demonstrate how to create and send a reminder task to My Tasks for the new employee.

Steps

1. Access the Create Alert Rule task.
2. Select *Change Benefits for Life Event* in the Business Process Type prompt.
3. As you complete the task, consider:

Option	Description
Description	New Hire Enrollment
Source External Field or Condition Rule	Enrollment Type
Relational Operator	Any in the selection list
Comparison Type	Value specified in this filter
Comparison Value	New Hire

4. Access the Schedule Task Alert Notifications task so the employee can receive the email alert.
   a. Include the *Change Benefits for Life Event* business process and the New Hire Enrollment alert rule.
   b. Add the message for the employee.

Passive Events

Steps: Set Up Passive Events

Prerequisites

Assign benefit annual rates to employees.

Context

Create passive events to manage benefit gains and losses that result from the passage of time rather than from changes to employee data. Example: Set up a passive event to evaluate and manage benefit eligibility for employees turning 65 (retirement age). Based on their eligibility for benefits, Workday generates an enrollment event to record any benefit gains or losses.

Unlike most enrollment events, you don't have to manually report passive events. You can configure Workday to identify anyone who has benefits gains and losses resulting from an event. Workday automatically routes an enrollment task to the affected worker.

Steps

1. Create Enrollment Events on page 1343 for passive events.

   Example: Set up a passive event type called *Employees >= Age 65*.
2. Create Enrollment Event Rules on page 1349 for the passive event types.

   This might include defining:

   - Begin dates and waiting periods for passive events that result in benefit gains.
   - End dates and grace periods for passive events that result in benefit losses.
3. (Optional) Configure the passive event to automatically complete and finalize enrollment without sending an enrollment task to the Benefit Partner or employee:
   a) Set up benefit plan eligibility rules to ensure that any employee included in the event is eligible for only 1 plan per coverage type. Also, select *No Changes Allowed* in the Allowed Benefit Plan Changes field in the Create Enrollment Event Rule task for each coverage type included in the event.
   b) If the passive event confers eligibility for new health care or insurance plans, select a default rule for the event that includes: instructions to *default to priority coverage* and define default health care/insurance plans and priorities in the Maintain Benefit Defaults task.

   Workday automatically completes and finalizes passive events that result in a complete termination of benefits.
4. Set Up Passive Event Business Processes on page 1443.

   Note: When you automate a passive event, Workday ignores routing instructions for the event and automatically finalizes it without sending an enrollment task to a Benefit Partner or employee. However, you must still provide routing instructions for the event.
5. (Optional) Add worklets to the *Change Benefits for Life Event* business process.
6. Create Passive Event Rules on page 1443.

   Set up passive event rules to identify the employees to process in response to the event.
7. Schedule Passive Events on page 1445.

   Create a schedule to instruct Workday when and how often to search and process employees that meet passive event rule criteria. Example: Set up a schedule for Workday to search for and process employees who are turning 65 on the first day of each month.

Related Information

Tasks

Steps: Set Up Benefits on page 1237

Steps: Set Up Automatic Benefit Eligibility Checks on page 1342

Reference

The Next Level: Benefits - Passive Events and Derived Coverage Targets

Set Up Passive Event Business Processes

Context

Configure the *Passive Event* business process to instruct Workday where to route passive events. The passive event results in an enrollment task for an employee, a Benefits Partner, or other designated role.

Note: Route enrollment task using a passive event to a role or security group directly in the *Passive Event* business process definition.

Steps

1. Access the *Passive Event* business process definition.
2. As a related action on the *Passive Event* business process, select Business Process > Edit Definition.
3. Enter the Effective Date.
4. Access the *Change Benefit Elections* step and identify the role to which to route the enrollment task for passive events in the Group field.

   Don't delete the *Change Benefit Elections* step in the *Passive Event* business process.
5. Make the initiation step the completion step.
6. If you need to route different passive events to different roles:
   a) Create a condition rule for each event type.
   b) Define two or more steps with the same order and action = *Change Benefit Elections*.
   c) Associate a different condition rule and role with each step. The condition rules must be mutually exclusive.

   Depending on how you define a passive event, Workday might ignore routing instructions for the event. It might automatically finalize it without sending an enrollment task to a Benefits Partner or employee. However, you must still provide routing instructions for the event.

Example

To route passive events based on condition rules, assume that these events have different routing requirements:

- Route to employee: An employee becomes eligible for a benefit after 1 year of service.
- Route to Benefits Partner: A dependent reaches an age and becomes ineligible for benefits.

1. Insert 2 *Change Benefit Elections* steps in the *Passive Events* business process, 1 for each passive event with a different *Route To* role.
2. Assign the same order to both steps.
3. Create a condition rule for event type = *Employee 1 Year of Service* and associate it with the first instance of the *Change Benefit Elections* step. Select *Employee* in the Group field for this step.
4. Create a condition rule for event type = *Dependent Age Out* and associate it with the second instance of the *Change Benefit Election* step. Select *Benefits Partner* in the Group field for this step.

Create Passive Event Rules

Prerequisites

- Security: *Set Up: Benefits* in the Benefits functional area.
- Create benefit plan and dependent eligibility rules using the Create Benefit Eligibility Rule or Edit Benefit Eligibility Rule tasks.

  You can use existing benefit plan and dependent eligibility rules, or create new rules to use specifically for passive events.
- Create benefit event types for the passive event rules using the Create Benefit Event Type task.
- Create benefit groups using the Create Benefit Group or Edit Benefit Group tasks.

Context

Create passive event rules to:

- Identify employees to evaluate for benefit eligibility. Example: all employees >= age 65.

  Unlike eligibility rules associated with specific benefit plans, passive event rules don't confer or deny eligibility for health care, insurance, or other benefits. Instead, their purpose is to identify employees to evaluate for benefit eligibility due to retirement, seniority, or other changes related to the passage of time. Workday uses the eligibility rules for the benefit plan to determine if an employee who meets passive event rule conditions is eligible for a particular benefit.
- Schedule preview alerts to employees to inform them that a passive event is about to occur. You can instruct Workday to send alerts at regular intervals before the event occurs. Examples: 60 days before employees turn 65, 30 days before the event occurs, and again 15 days before the event occurs.

  Note: Preview alerts are email notices. Set up email addresses for your employees before you generate preview alerts.

Steps

1. Access the Create Passive Event Rule or Edit Passive Event Rule task.
2. Specify the Benefit Life Event Type.
3. Select a Benefit Plan or Dependent Eligibility Rule.

   The rule tells Workday which employees to evaluate for benefit eligibility and target for preview alerts.
4. Identify the Benefit Group(s) that use the passive event rule.
5. Consider:

Option	Description
Notify Prior to Event Date	Select the number of days, weeks, or months before the event date that you want Workday to send a preview alert. You can define multiple preview alerts for the same event. Example: Send 1 alert 30 days before an event takes place, and send another 15 days before the event takes place. To create alert frequencies, use the Maintain Calculated Dates task.
Subject	Configure the subject line of the email alert message.
Message Text	Configure the text of the alert to send to employees before the passive event. You can embed hyperlinks in the text of your message. However, you must use the full web address format. Example: `http://www.url.com`.

Next Steps

Define a schedule for:

- Generating enrollment events for employees who have benefit gains or losses resulting from a passive event.
- Generating preview alerts.

Related Information

Concepts

Concept: Passive Event Rules on page 1447

Schedule Passive Events

Prerequisites

Security: *Set Up: Benefits* in the Benefits functional area.

Context

Schedule passive events to:

- Identify and process employees who meet passive event rule conditions on demand or at regular intervals.
- Generate preview alerts.

Steps

1. Access the Schedule Passive Events task.
2. As you complete the task, consider:

Option	Description
Passive Event Rule	Select the Passive Event Rule to include in the process schedule. You can process passive event rules on demand or at regularly scheduled intervals. Workday searches for employees meeting passive event rule criteria according to the schedule and automatically creates an enrollment event for employees with benefit gains or losses. Create passive event rules using the Create Passive Event Rule or Edit Passive Event Rule tasks.
Generate Passive Events	Creates enrollment events for employees who: • Meet conditions of the rule identified in the Passive Event Rules field. • Have benefit gains or losses resulting from the passive event. You can generate passive events and preview alerts at the same time, or separately.
Generate Passive Alerts	Generates preview alerts for employees who satisfy the conditions of the Passive Event Rule on or after the preview interval. Specify the interval using the Create Passive Event Rule task. Example: You configure Workday to send a preview alert 1 week before a retirement event. Workday sends the alert if you schedule the alert and Workday processes it a week or less before an employee turns 65.

Option	Description
	Workday sends only 1 instance of a preview alert to an employee for a given event. Workday follows this rule even if you schedule and generate passive alerts multiple times leading up the event.

3. If the Run Frequency selected is *Run Now*, Workday processes the passive event rule and generates alerts and enrollment events when you save your work. If you selected any other Run Frequency, complete the frequency fields on the Schedule tab:

Run Frequency	Frequency Fields
Run Once in the Future	Specify a Start Date, Start Time, and a Time Zone for processing the passive event rule.
Daily Recurrence	• Select how often to process the event rule: Recurs Every Weekday or Recurs Every x Day(s), where *x* is any positive integer. • Select a Start Time and a Time Zone for processing the passive event rule. • Specify a Start Date and an End Date for processing the passive event according to the schedule you've created.
Weekly Recurrence	• Enter a processing frequency in the Recurs Every x Weeks field, where x can be any positive integer. • Select the Day(s) of the Week on which to process the passive event rule. • Select a Start Time and a Time Zone for processing the passive event rule. • Specify a Start Date and an End Date for processing the passive event according to the schedule you've created.
Monthly Recurrence	• Select the Month(s) on which to process the passive event rule. • Select the Day(s) of the Month or the Day of the Week on which to process the passive event rule. • Select a Start Time and a Time Zone for processing the passive event rule. • Specify a Start Date and an End Date for processing the passive event according to the schedule you've created.

Note: When scheduling passive events on a recurring basis, Workday doesn't permit you to add an End Date beyond December 31 of the next calendar year.

4. Review the information on each tab of the Scheduled Process:

Tab	Purpose
Passive Event Rules	• View workers who meet passive event rule conditions when you process a passive event. • View and manage enrollment events created for a passive event rule.
Process Info	View the status of the passive event process.
Messages	View error messages or warnings related to the passive event process.

Next Steps

- Access the Process Monitor to view the status of the passive event process run.
- Access the Benefits > View Passive Alerts from the worker's related action menu.

Related Information
Reference
The Next Level: Benefits - Passive Events and Derived Coverage Targets

Concept: Processing Passive Events for the First Time

The first time that you generate passive events for a particular passive event rule, it is best to schedule and generate preview alerts for a different time. Otherwise, some employees receive preview notices after they've met conditions specified in the passive event rule.

Example:

- You define a schedule for generating passive events and alerts every day for dependent children who age out of health coverage. You set up preview alerts to be sent out 3 weeks, 2 weeks, and 1 week before the date when a dependent turns 26.
- If you process the passive event rule for the first time on January 31, the initial process run identifies and sends the 3 preview alerts to all employees whose dependents turned 26 on or before January 31, even though some dependents have already met conditions of the event rule.

When a preview alert runs at the same time as a passive event, Workday can't identify the employees who have already met passive event rule conditions and sends alerts to everyone. To avoid this situation, schedule and run preview alerts separately from passive events the first time you process a passive event rule. In the Schedule Passive Events task:

- Select only the Generate Passive Events check box for the first run of a passive event rule. Workday generates enrollment events for anyone who has already met rule conditions without sending alerts.
- From then on, select both the Generate Passive Alerts and Generate Passive Events check boxes when you schedule and process the rule. Workday sends alerts to anyone who meets rule conditions in the future.

  Workday recognizes that employees processed in the first run of a passive event rule have already met its conditions and doesn't send preview alerts to those employees.

Concept: Passive Event Rules

When to Use

Passive event rules identify employees to evaluate against eligibility criteria associated with specific benefit plans. You can use them to automate plan changes when the employee meets new eligibility rules. You can also automate plan changes for when an employee no longer meets eligibility rules. Example: An employee turns 65 and no longer can use Long-Term Disability Plan A.

The rules don't need to duplicate the complexity of eligibility criteria associated with the plans themselves.

- Passive event rules *invert* eligibility rules associated with benefit plans that employees lose when the event takes place:

Benefit Plan Eligibility Rule	Corresponding Passive Event Rule
Only employees < age 65 are eligible for Long-Term Disability Plan A.	Identify employees >= age 65 and evaluate them for benefit eligibility.
Only dependents < age 25 are eligible for Health Care Plan C.	Identify dependents >= age 25 and evaluate them for benefit eligibility.

- Passive event rules *mirror* eligibility rules associated with benefit plans that employees gain when the event takes place:

Benefit Plan Eligibility Rule	Corresponding Passive Event Rule
Only employees with length of service >= 5 years qualify for Insurance Plan B.	Identify employees with length of service >= 5 years and evaluate them for benefit eligibility.
Only employees >= 65 qualify for Basic Disability Plan D.	Identify employees >= age 65 and evaluate them for benefit eligibility.

You can use the Schedule Passive Events task to:

- Generate an enrollment event for employees who lose or gain benefit eligibility as a result of a passive event.
- Schedule and run the passive event rule.

You can use the same schedule that you generate preview alerts or define separate schedules for alerts and events.

Dependent children have eligibility for Health Care Plan A if they are:

- Less than or equal to age 21.
- Less than 25 years of age and full-time students.

To evaluate dependents for eligibility, the passive event rule needs only this simple condition: *Dependent child greater than (>) age 21*.

This rule inverts the eligibility criteria associated with the health care plan by identifying the age at which Workday evaluates dependents for eligibility. Workday identifies all dependent children greater than age 21. The eligibility rule then determines whether a dependent:

- Loses eligibility because they're over 21 and no longer in school.
- Retains eligibility because they're less than 25 and a full-time student.

If the passive event rule in this example repeated the dependent eligibility rule, it would:

- Include dependents who you don't need to evaluate: *All dependent children less than or equal to age 21*.
- Miss the dependents who you do need to evaluate: *All dependent children greater than 21*.

Considerations

As you plan your passive events, consider:

- Workday generates enrollment events only for employees who:
    - Meet the conditions of the passive event rule on the day and time Workday runs the rule.
    - Satisfied rule conditions between the last and current runs of an event rule and that Workday missed in the previous run.

- Run event rules frequently enough to find employees that meet rule conditions before the current run or between run dates. Workday might miss preview notices for some employees if you don't run the event rule often enough.

  Example: You run a passive retirement event rule every other week on Monday. If an employee reaches retirement age mid week, Workday reads the event on its next scheduled run.

  Note: Workday recommends that you schedule and run passive event rules only frequently enough to meet your business needs. Too many runs might put an unnecessary burden on resources.
- Workday uses the date of the run that picked up the employee as the event date. This date might differ from the date that an employee first satisfies the passive event rule conditions. Example: A scheduled run picks up employees who met passive event rule conditions before the run date. The event date for these employees is the run date, not the date on which they first satisfied the rule conditions.
- Once Workday flags an employee as meeting the conditions of a passive event rule, it generates an enrollment event. Workday won't generate additional enrollment events related to that event rule.
- After Workday generates an enrollment event for an employee, it won't send any further preview alerts for that event.

Service Anniversary Events

When creating passive event rules based on service anniversary dates, you can calculate length of service from any of these dates:

- Hire.
- Continuous service.
- Original hire.
- Service.

Workday requires the Hire Date to process passive events based on continuous service dates, original hire dates, or seniority dates.

Concept: Preview Alerts for Passive Events

You can send out preview alerts to employees that they have a passive event that is approaching.

You can define a schedule for generating the alerts and generate preview alerts that match your schedule for generating enrollment events.

Workday sends alerts only to employees who:

- Meet the exact number of days, weeks, or months in the Notify Prior to Event Date field, before the date when Workday processes the event.
- Met rule conditions between the last and current process runs and Workday didn't flag the last time it processed alerts.

Using the Schedule Passive Events task, you schedule and process alerts for a retirement age event on January 4 and 18. You also set up preview alerts for Workday to send 2 weeks prior (January 10) and 1 week prior (January 17) to the date employees reach retirement age.

An employee turns 65 on January 24.

The first alert runs on January 4, and comes before the 1 and 2-week alerts scheduled for January 10 and 17. As a result, Workday doesn't generate preview notices. The second scheduled alert runs on January 17 comes after the employee meets rule conditions for both alerts. Workday consequently picks up and sends both preview notices on the 18th.

As you plan your preview alerts, consider:

- How often you schedule and generate alerts. You need to consider how frequently you generate alerts to match the scheduled preview for an event. If your schedule and alert generation timing don't match, Workday might miss preview notices for some employees.

  Example: You create preview alerts for Workday to send out 2 weeks before an employee reaches 65. However, you also schedule and generate passive alerts monthly on the 25th. The current date is December 25 and an employee turns 65 on January 21. Workday won't generate preview alerts for that employee. Workday next processes alerts on January 25. Workday can determine that it didn't flag the employee and can send the missed preview notice.

  Note: To avoid sending multiple preview alerts, consider scheduling alert runs more frequently. Or, you can reduce the alert frequency in the Generate Preview Alerts field.
- Workday sends only 1 instance of any preview alert to an employee. Example: You create 2 alerts to notify employees that a retirement event is about to occur. You schedule the first alert 1 a month before the event and the second 2 weeks before the event. Workday sends out only 1 instance of each alert.
- Workday stops sending alerts to the employee after Workday schedules an event rule and generates an enrollment event.

Related Information

Tasks

Create Passive Event Rules on page 1443

Schedule Passive Events on page 1445

FAQ: Passive Events

How are passive events different from standard enrollment events?

How do I test a passive event rule to make sure that it selects the correct employees for processing?

What is the difference between eligibility rules associated with benefit plans and the eligibility rules used to define passive events?

How are passive events different from standard enrollment events?

Unlike most enrollment events, you don't have to report manually passive events for the affected employees. You can instruct Workday to identify and route an enrollment task to workers that have benefit gains or losses resulting from the event.

Passive events don't establish or determine eligibility for benefits only once, when Workday launches the event. During open enrollment, Workday assesses an employee's eligibility for benefits when initiating the enrollment event. Workday doesn't automatically re-evaluate the employee's eligibility and change their status following open enrollment. The employee or an administrator must report another event to force evaluation of the employee's eligibility for benefits. Example: A location change or job change event. By contrast, you can schedule passive events to evaluate employee eligibility at any time, either on demand or at regularly scheduled intervals.

You can define preview alerts for a passive event to notify automatically employees that an event is about to occur. Example: A 65th birthday or the aging out of a dependent is about to occur. You can generate these alerts at regular intervals before the event date.

How do I test a passive event rule to make sure that it selects the correct employees for processing?

To verify that a passive event rule identifies the correct employees, run the View Workers report. To access this report, select Passive Event Rule > View Workers as a related action on the passive event rule.

To verify that a passive event rule correctly identifies a particular employee, run the Test Workers report. To access this report, select Passive Event Rule > Test Workers as a related action on a passive event rule and select the employee.

What is the difference between eligibility rules associated with benefit plans and the eligibility rules used to define passive events?

Unlike eligibility rules associated with specific benefit plans, passive event rules don't confer or deny eligibility for health care, insurance, or other benefits. They identify employees for Workday to evaluate for benefit eligibility due to retirement, seniority, or other changes due to the passage of time. An employee who meets passive event rule conditions is eligible for a particular benefit only if they meet the eligibility rules associated with the benefit plan.

Example: A passive event rule for a retirement event identifies all employees who are 65 years old. The eligibility rule for the employees' health care plan determines whether they either:

- Can keep their current plan.
- Lose eligibility when they turn 65.

Troubleshooting: Passive Events

Passive events don't trigger benefit enrollment events.

Cause	Solutions
The worker hasn't had a change in eligibility that would trigger an enrollment event.	Security: *Manage: Benefits for Organizations* domain in the Benefits function area. 1. Access the Benefits Eligibility by Benefit Group report. 2. Run the report for past and current dates to check if the worker has gained or lost eligibility for the benefit plan.
The worker doesn't meet the requirements for the eligibility rule.	Verify that the worker is eligible for the enrollment event. Security: • *Set Up: Benefits* domain in the Benefits function area. • *Person Data: Personal Information* domain in the Personal Data functional area. 1. Open the profile of the worker. 2. To view benefit group and eligible benefit plans, select Benefits > View Benefits Eligibility from the worker's related actions menu. To view the current benefit enrollment information, select Benefits > View Current Benefit Elections from the worker's related actions menu. 3. Access the Edit Passive Event Rule task. 4. View the Benefit Eligibility Rule and compare the Benefit Groups with the groups the worker is eligible for.
The passive event doesn't meet the criteria to trigger the enrollment event.	Security: *Set Up: Benefits* domain in the Benefits function area. 1. Set up the *Set Up: Benefits* domain in the Benefits functional area.

Cause	Solutions
	2. Access the Edit Passive Event Rule task and check the event. 3. Click the Event Rule Type and Benefit Eligibility Rule links. Verify that they're compatible. Verify that the passive event rules: • Invert eligibility rules associated with benefit plans that employees lose when the event takes place. • Mirror eligibility rules associated with benefit plans that employees gain when the event takes place. • Meet the event date requirements. Workday uses the run date that picked up the employee as the event date. This date might differ from the date on which an employee first satisfies the passive event rule conditions. 4. Check whether you've scheduled the passive event to run. Access the Schedule Passive Events task. Make sure that the rule runs frequently enough, but not so frequently to cause performance impacts.
Workday can't rerun the passive event rule for the worker to register a change.	*Set Up: Benefits* domain in the Benefits function area. 1. Access the Edit Passive Event Rule task. 2. Select the Is Re-Runnable check box for the event.
The passive event rule schedule is inactive.	*Set Up: Benefits* domain in the Benefits function area. 1. Access the Schedule Passive Events task. 2. Reactivate the passive event schedule.

Related Information

Concepts

Concept: Passive Event Rules on page 1447

Tasks

Create Passive Event Rules on page 1443

Schedule Passive Events on page 1445

Evidence of Insurability

Steps: Set Up Evidence of Insurability

Context

Set up the levels of change an employee can make during enrollment that triggers the evidence of insurability (EOI) process.

Steps

1. Steps: Set Up Insurance Costs on page 1268
2. Create Insurance Plans on page 1295
3. Create Enrollment Event Rules on page 1349

Result

During enrollment, Workday determines whether to trigger EOI when an employee elects an insurance plan by identifying:

1. The event type.
2. Which loss of coverage rules apply based on whether the employee enrolled in an insurance plan, waived coverage, or newly eligible for a new plan.
3. Which benefit plans to use when determining whether to trigger EOI. Is the Include All Benefit Plans in Coverage Type for EOI check box selected for any of these sections on the Create Enrollment Event Rule task?

    - Currently Covered
    - Currently Waiving
    - New Eligible

    If yes, then use all the coverage levels from all benefit plans within the coverage type. If no, then only use the relevant benefit plan.
4. If the employee elected an amount that is greater than or equal to:

    - For Currently Covered:
        - Maximum Levels of Change Allowed without EOI
        - Maximum Amount of Change Allowed without EOI
        - Guaranteed Issue Amount
        - Guaranteed Issue Multiplier
    - For Currently Waiving or Newly Eligible:
        - Guaranteed Levels without EOI
        - Guaranteed Issue Amount
        - Guaranteed Issue Multiplier

Related Information
Tasks
Steps: Set Up Benefits on page 1237

Steps: Manage Evidence of Insurability

Prerequisites

- Set up enrollment event rules.

  To define rules for handling changes in insurance coverage, use the Level of Change - Currently Covered, Levels of Change - Currently Waiving, and Levels of Change - Newly Eligible tabs.
- Complete and finalize open enrollment or a benefit event.

Context

Track and record workers' evidence of insurability (EOI) status.

Steps

1. Access the Manage Evidence of Insurability Status task.
2. Search for workers with EOI activity.
3. Select the workers whose EOI status you want to review or update.
   - Select the Select All check box, if you want to review or update all the workers listed.
   - Select the Select check box next to each worker's name to review or update individual workers.
4. Select the action you want to take on the selected workers:

Option	Description
Approve for selected	Change the workers EOI status to *Approved*.
Deny for selected	Change the workers EOI status to *Denied*.
Email for selected	Send an email to the workers regarding their EOI status.

   You can also select the View Details link next to each worker.

Result

Workday displays a confirmation page, where you can create the email message. Email notifications are sent to the worker's primary work email address. If workers don't have a work email address, they won't receive EOI status notifications.

Depending on the selected action, Workday updates the insurance coverage to the:

- Full amount elected as defined in the EOI Takes Effect On Date field for the benefit group, when the action is *Approved*.
- *Waived*, when the action is *Denied* and the Guaranteed Issue Amount is zero.
- Guaranteed Issue Amount, when the action is Denied and the Guaranteed Issue Amount is greater than zero.
- Prior coverage amount, when the worker has prior coverage and that coverage amount is greater than the guaranteed issue amount.

Related Information

Concepts

Concept: Evidence of Insurability Processes on page 1455

Tasks

Steps: Set Up Enrollment Events and Rules on page 1341

Correct Employee EOI Approval and Denial Dates

Context

You can correct EOI approval and denial dates that were entered in error.

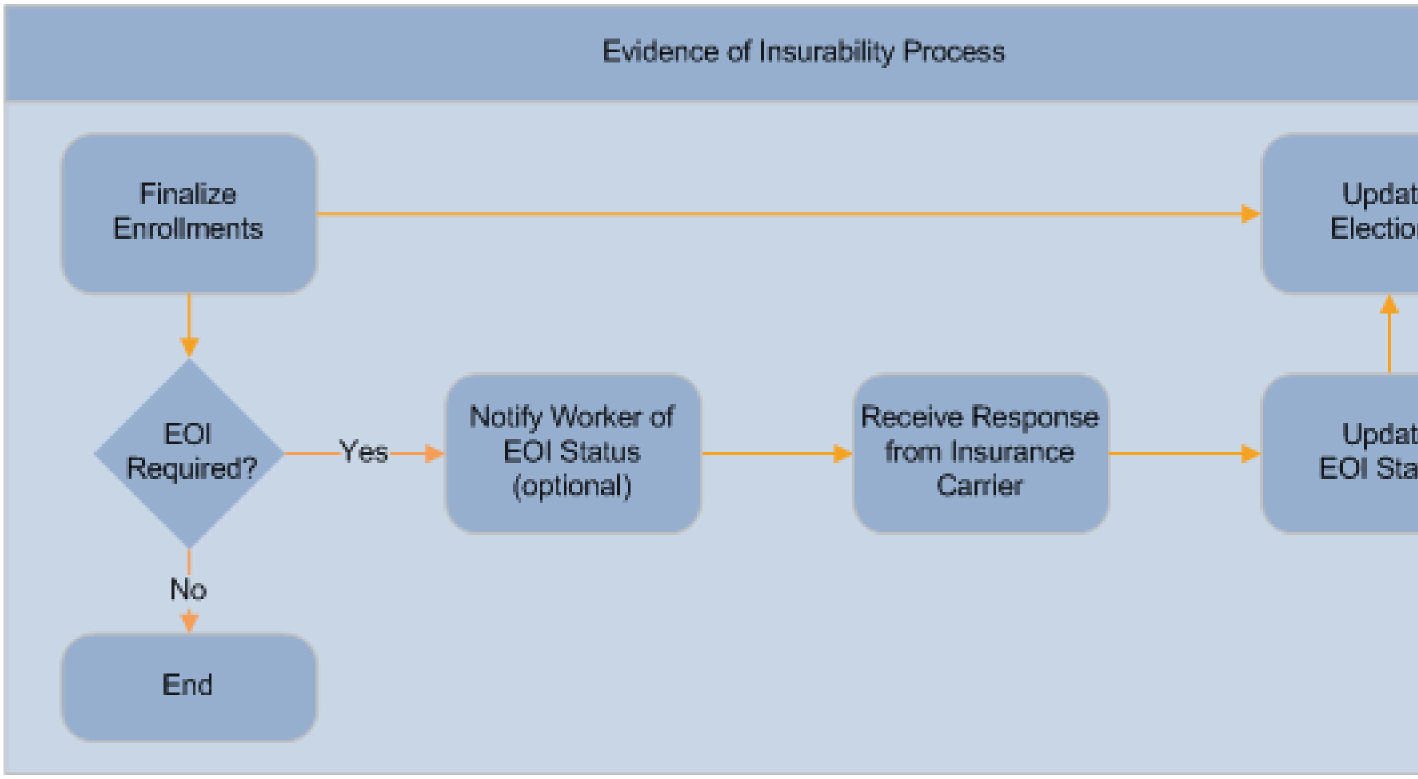
Steps

1. Access the Manage Evidence of Insurability Status task.
2. Click the View Details link for an employee with an EOI Status of *Approved* or *Denied*.
3. Select View Details > Evidence of Insurability > Correct Approval/Denial Date from the employee's related action menu.
4. Enter the correct approval or denial date in the Approve/Denied Date field.

Related Information
Tasks
Steps: Manage Evidence of Insurability on page 1454

Concept: Evidence of Insurability Processes

The EOI review and approval process is triggered automatically when an employee elects an amount or level of coverage over the guaranteed issue amount. The guaranteed issue amount is the maximum amount an employee can elect without evidence of insurability.



When the Benefits Administrator finalizes an enrollment event, Workday:

1. Identifies:

    - Employees that have elected coverage that is greater than the Guaranteed Issue Amount or Guaranteed Issue Multiplier.
    - Employees that had no insurance coverage before but have elected coverage that is greater than the Guaranteed Levels Without EOI.
    - Employees that had insurance coverage before but have elected coverage that is greater than the Maximum Levels of Change Allowed Without EOI or Maximum Amount of Change Allowed Without EOI.
2. If an employee elects an amount or level of coverage that requires evidence of insurability, the EOI process automatically sets the employee's EOI status to *Pending*.

    Use the Manage Evidence of Insurability Status task to search for employees with a status of *Pending*. You can also use this task to send an email notification that contains a link to the EOI form. The enrollment form Insurance section instructional text can also include a link to the EOI form.
3. When the status is *Pending*, Workday updates the employee's coverage during the EOI review period to:

    a. The elected coverage, if the Default Coverage if Pending EOI value is *Elected Coverage Amount*. The effective date of coverage is determined by the EOI Takes Effect on Date for the benefit group.

    b. The guaranteed issue amount, if the Default Coverage Pending EOI value is *Guaranteed Issue Amount*. The effective date of coverage is determined by the EOI Takes Effect on Date for the benefit group.
4. When the insurance carrier approves or denies the employee's EOI claim, the Benefits Administrator enters the employee's status (*Approved* or *Denied*) on the Manage Evidence of Insurability Status task.

    You can use the Manage Evidence of Insurability Status task to send an email notification informing the employee of their new status.
5. If the status is *Approved*, the employee's benefit coverage is updated to the elected coverage.
6. If the status is *Denied*, Workday updates the employee's coverage to:

    a. The guaranteed issue amount, if the guaranteed issue amount does not equal zero. The effective date of coverage is determined by the EOI Takes Effect on Date for the benefit group.

    b. The previous coverage, but only when the employee is changing plans.

    c. Waived, if the guaranteed issue amount equals zero.

Benefits Administrators can finalize open enrollment and other benefit change events while the EOI process is pending. This is because Workday tracks evidence of insurability outside of the enrollment process.

FAQ: How are coverage levels determined for evidence of insurability?

Normally, coverage levels are simply the coverage levels associated with a specific insurance plan. However, you might want the coverage levels in all benefit plans within a coverage type to be considered when determining changes in coverage levels. Selecting the Include All Benefit Plans in Coverage Type for EOI check box tells Workday to use all benefit plans.

Example: If you have a coverage type for Supplemental Health that has 3 benefit plans: Plan A, Plan B, and Plan C, coverage for these plans is:

Plan A	Plan B	Plan C
10,000	100,000	1 x Salary
25,000	200,000	2 x Salary
50,000	300,000	3 x Salary

Plan A	Plan B	Plan C
75,000	400,000	4 x Salary

Other rules for the event are:

- Maximum Levels of Change Allowed without EOI = 2
- The Include All Benefit Plans in Coverage Type for EOI check box is selected

An employee with a salary of 40,000 USD currently electing 25,000 USD in Plan A elects 2X in Plan C. The employee must go through EOI because going from 25,000 USD to 2X (80,000 USD) is a change of 4 levels.

Workday considers the levels as:

- 10,000
- 25,000
- 1X (40,000)
- 50,000
- 75,000
- 2X (80,000)
- 100,000
- 3X (120,000)
- 4X (160,000)
- 200,000
- 300,000
- 400,000

Related Information
Tasks
Steps: Manage Evidence of Insurability on page 1454

COBRA

Steps: Set Up COBRA Automation

Prerequisites

Define how Workday designates COBRA eligibility.

Context

Workday enables you to track who is eligible for COBRA and provide the information for the integration with a third-party COBRA administrator. Workday isn't a COBRA administrator.

COBRA events result when Workday determines that an employee or dependent has lost benefit eligibility. Loss of eligibility can result from a:

- Passive event, such as a child turning 26 years old.
- Staffing event, such as a termination or reduction in hours.
- Life event, such as divorce.

You can create an employee or dependent COBRA record in 2 ways:

- Automatically, set up Workday to detect when an employee or dependent loses eligibility and create the COBRA records. You can optionally have an administrator review and update the COBRA records.

- Manually, by entering the COBRA information yourself selecting the Grant COBRA as a related action off the employee or dependent.

Steps

1. Set up your integration with a third-party COBRA administrator.

   See Concept: COBRA Integration.
2. Configure the security policy for the *Set Up: Benefits* domain in the Benefits functional area.
3. Set up COBRA eligible benefit coverage types.

   Set up the benefit coverage types that are eligible for COBRA by using the Maintain Benefit Coverage Types task. These types include:

   - Health care.
   - Insurance.
   - Spending accounts.
   - Additional benefit plans.

   If you want Workday to perform a COBRA eligibility check automatically, you must complete this step.
4. Set up COBRA eligibility reasons.

   Map specific benefit event types to COBRA eligibility reasons. If you want Workday to perform a COBRA eligibility check automatically, you must complete this step.
5. As you complete the Maintain COBRA Eligibility Reasons task, consider:

Option	Description
Benefit Event Type	Links the benefit event type to the COBRA eligibility reason.
Months of COBRA Coverage	If this field is blank, Workday automatically uses 18 months to calculate the COBRA coverage end date.

6. Add *Ex-Spouse* as a dependent relationship.

   Use the Maintain Related Person Relationships task.

   For a divorce, you might need to create a relationship for ex-spouse that isn't eligible for benefit coverage. Change the spouse's relationship to this relationship before you enter the divorce using the Change Benefits task.
7. Set up reasons for removing dependents.

   This step is specific to granting COBRA to dependents automatically. Add a Reason Category for removing dependents for the *Dependent Event* by using the Maintain Event Categories and Reasons task. Reasons could be *Dependent Over Age*, *Death*, or *Divorce*.
8. Create Enrollment Events on page 1343.

   If a benefit event can result with different months of eligible COBRA coverage, create a benefit event for each outcome. Example: a benefit event for Termination - 18 months COBRA and another for Termination - 36 months COBRA.

   Make sure that you create COBRA eligibility reasons for each event.
9. Create Enrollment Event Rules on page 1349.

   Define the coverage end date for the various benefit enrollment events. Workday uses this date to determine when the employee or dependent becomes eligible for COBRA coverage.

10. Steps: Set Up Automatic Benefit Eligibility Checks on page 1342

    If you want Workday to perform an eligibility check automatically, you must complete this step. Add the *Change Benefit Elections* business process as a step to an eligible business process.

    Note: Automate COBRA eligibility fully by removing the *Review COBRA Eligibility* steps from all business processes including the *Change Benefits for Life Events* business process.
11. To skip the review of COBRA records, remove the *Review COBRA Eligibility* business process as a step in the *Change Benefits for Life Events* business process.

Result

In business processes that include the *Change Benefit Elections* subprocess, Workday creates a COBRA record for each benefit plan that the new COBRA participant is eligible for. These records are available to any established third-party COBRA integrations.

Next Steps

After the participant receives COBRA, you can use the:

- COBRA Report to see a list of all COBRA participants for a specific date range.
- Correct COBRA Eligibility related action off the employee or dependent, to edit existing COBRA records.
- View COBRA Eligibility related action off the employee or dependent, to see detailed information about the COBRA participant.

Related Information
Reference
The Next Level: Fireside Chat: How COVID-19 Impacts Benefits

Grant COBRA Eligibility

Prerequisites

Set up your integration with a third-party COBRA administrator.

Context

You can grant COBRA eligibility to an employee or an employee's dependent by entering the information yourself.

Note: You can also use the *Grant Cobra Eligibility* web service to grant COBRA eligibility to more than 1 person at a time.

Steps

1. Select Benefits > Grant COBRA Eligibility from the related actions menu of the employee or employee's dependent.
2. Add a separate record for each benefit plan the employee or dependent is eligible for.

Result

Workday creates a COBRA record for the new COBRA participant that any established third-party COBRA integrations picks up.

Next Steps

Use Correct COBRA to update COBRA eligibility records for an employee or dependent.

Related Information

Concepts

Concept: COBRA Integration

Correct COBRA Eligibility Records

Context

You can correct existing COBRA eligibility records or delete the entire record.

Steps

1. Select Benefits > Correct COBRA Eligibility as a related action off the employee or employee's dependent.
2. To revoke COBRA eligibility, clear the COBRA Eligibility check box for the plan that you want to revoke eligibility for.

Result

The existing COBRA record is either updated or removed.

Grant COBRA to an Ex-Spouse

Prerequisites

Create an employee relationship type to represent an ex-spouse using the Maintain Related Person Relationships task. The relationship can't be eligible for benefits.

Context

Grant COBRA to an ex-spouse.

Steps

1. Change the spouse's relationship to one that is not eligible for benefits. Example: Ex-spouse.
2. Enter the marital status change.

Result

If you have automated the COBRA eligibility check, Workday creates the COBRA record.

If you have not automated COBRA, then create the COBRA record using the Grant COBRA Eligibility task.

Related Information

Tasks

Manage Personal Relationship Types on page 1498

FAQ: How is the Qualifying Event Date determined?

When an employee or their dependents become eligible for COBRA, Workday provides these dates:

- Benefit Event Date: The date on which the employee or dependent becomes eligible for a change in benefit coverage. Or, the date when they're no longer eligible for coverage.
- COBRA Eligibility Date: The date that benefit coverage ends, as defined by the event rules, plus 1 day.
- (COBRA) Qualifying Event Date: The date the employee or dependent experienced an event that made them eligible for COBRA. Workday calculates the date as the benefit event date minus 1 day. For termination, it's the same day as the benefit event date.

- COBRA Coverage End Date: The date calculated by adding the value of the Months of Coverage field (from the Maintain COBRA Eligibility Reasons task) to the COBRA Eligibility Date.

Event Type	Description	Qualifying Event Date
Divorce	Employee enters a divorce effective September 25.	September 24
Loss of Hours	Employee's has hours reduced to part-time effective September 25.	September 24
Overage Child	Child turns 26 on September 25. Passive event runs on September 28.	September 27
Termination	Employee becomes terminated effective September 25.	September 25

Patient Protection and Affordable Care Act

Setup Considerations: Affordable Care Act Reporting

You can use this topic to plan your configuration and use of reporting to meet the requirements of the Patient Protection and Affordable Care Act (ACA). 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
- Business Benefits
- Use Cases
- Questions to Consider
- Recommendations
- Requirements
- Limitations
- Tenant Setup
- Security
- Business Processes
- Reporting
- Integrations
- Connections and Touchpoints

What It Is

The ACA regulates medical coverage for US employees. Workday enables you to report medical coverage to the Internal Revenue Service (IRS) to meet ACA reporting requirements.

Business Benefits

Workday helps you comply with ACA regulations by enabling you to prepare and transmit ACA forms to the IRS and to employees.

Use Cases

- You're an Applicable Large Employer (ALE) that needs to provide 1095-C forms each year to employees to summarize coverage.
- You need to create 1095-C and 1094-C forms to transport to the IRS for Affordable Care Act reporting.
- You have multiple ALE groups or a foreign ALE group.
- You have multiple companies under a single entity.
- You need to enable software partners to manage form transmissions.

Questions to Consider

Question	Considerations
How will you manage the printing and mailing of 1095-C forms?	You can configure an *ACA Mailing Connector* integration that sends ACA 1094-C and 1095-C data to an external mailing service provider. The vendor, CIC Plus, provides the mailing service support at an additional cost. You can access the Create ACA 1095-C Forms task to generate PDFs and print them.
Will you use software partners to manage transmission of forms to federal and state governments?	You can enable software partners to do form transmission when you create or edit the company configuration.
What funding method do your benefit plans use?	The 1095-C data creation process uses the funding method (self-insured or fully funded) of benefit plans as of the day that you run the process. You can edit the benefit plans to change the method before creating data when both: • The funding method of the plans changes. • You need to use the method as of the reporting year. After you've completed reporting, you can edit the plan to restore the funding method. Example: In plan year 2021, you change to the *Self Insured* funding method. However, when you transmit your 2020 1095-C reporting to the IRS, you need to change the funding method to *Fully Insured* to match the method used that year. You restore the funding method to *Self Insured* after you've completed the 2020-year reporting.

Recommendations

Consideration	Recommendation
Alternate Work Location	To ensure correct effective dating for residency requirements, use the Change Contact Information task instead of the Change Work Contact Information task.
Dependents of Deceased Employees for Self-Insured Medical Plans	You can hire surviving dependents as part-time employees if you're a self-insured organization. This method ensures that the 1G code populates correctly. For a large number of dependents, you can use the *Import 1095-C Forms Recipients Data* EIB.
EIB Configuration	To shorten address and name lengths, use the *Import 1095-C Form Recipients Data* EIB.
Importing Recipients	Use the *Import 1095-C Forms Recipients Data* EIB to load form data for covered participants whose enrollments you don't track in Workday. Example: COBRA recipients or retirees.
Legal Considerations	Consult with your legal team and benefit broker to determine: • Safe harbors for which you have eligible workers. • If you have populations to add or exclude from 1095-C data creation. • If you have multiple or foreign ALE groups or members that fall under the employer mandate. • If you have multiple companies that you need to report as a single entity. • Which configuration options to use for line 14, 15, and 16 codes in the Use coverage end date in month of termination check box, in the Create ACA 1094-C Company Configuration task.
Medical Plans	To ensure accurate codes for line 14, configure fields under the US Affordable Care Act Options section and the ACA Minimum Essential Coverage sections for medical plans.
Poverty Guidelines	Set up annual U.S. Federal poverty guidelines on the Affordable Care Reporting Configuration task to ensure accurate codes and line 15 values.
Retirees	You can verify that retirees have membership in a retiree organization when you select the Include Retirees check box on the Create ACA 1094-C Company Configuration task.
Tuning Rules	You can create Benefit eligibility rules that include or exclude types of employees from 1095-C reporting, called ACA 1095-C tuning eligibility

Consideration	Recommendation
	rules. Example: Exclude contractors from your reporting.
Waiting Periods	Configure waiting periods with enrollment event rules to ensure accurate 1095-C codes for the Limited Non-Assessment Period (LNAP).

Requirements

- Select the *Medical* option for the Health Care Coverage Type to enable the ACA-related fields.
- When using the *Import 1095-C Form Recipients Data* EIB, use the IRS country codes for international addresses. The IRS doesn't use ISO country codes.
- Speak with your internal legal team or benefit broker about ACA requirements.

Limitations

Workday provides 1094-C data, but doesn’t generate 1094-C PDF forms. Workday does generate 1095-C PDF forms.

Workday automatically makes 1094-C authoritative or not-authoritative. You can’t configure this criterion. Workday suggests importing other 1095-C data using the Import 1095-C Form Recipients Data EIB. You can send all of your 1095-C data collectively to the IRS under one authoritative transmission.

You might experience performance problems if you’ve configured more than 75 Payroll earnings on the Affordable Care Reporting Configuration task.

Starting in Tax Year 2020, these fields require you to use the Import 1095-C Form Recipients Data EIB to populate 1094-C and 1095-C forms:

- Plan Start Month: A 2-digit number for the month. Required starting in TY 2020.
- (Optional) Employee's Age on January 1: A whole number from 1 to 120.
- Line 14: Individual coverage Healthcare Reimbursement Accounts (ICHRA) codes.
- Line 17: A 5-digit zip code when Line 14 codes include codes for ICHRAs.

Tenant Setup

No impact.

Security

Domains	Considerations
Affordable Care Act (ACA) Administration - USA in the Benefits functional area.	Enables you to configure ACA: • ALE groups. • Company configuration. • Measurement periods. • Reporting. • Safe harbors. Benefits administrators can manage ACA 1094-C correction overrides and ACA ALE member order, as well as view ACA reports.
Integration Build in the Integration functional area.	Enables you to create and configure integrations that send ACA 1094-C and 1095-C data to the IRS.

Domains	Considerations
Manage: ACA Partner Integrations in the Benefits functional area.	Enables you to grant ACA data access to software partners for form transmission.
Process: ACA Tax Filing 1094-C/1095-C - USA in the Benefits functional area.	Enables you to run the annual tax filing process and can create 1095-C data and forms.

Business Processes

No impact.

Reporting

Reports	Considerations
View 1094-C Form Data	Enables you to verify: • The total number of 1095-C forms for the ALE. • Whether someone has corrected the 1094-C data after transmitting it to the IRS.
View 1094-C FTE and Total Count Details	Enables you to review all employees included in the total and full-time employee counts.
View 1095-C Form Recipient Data	Enables you to view corrections and external recipients loaded by the Import 1095-C Forms Recipient Data EIB.
View Current 1095-C Form Recipient Data	Enables you to view the same data as the View 1095-C Forms Recipient Data report, but displays only the most recent 1095-C form.
1095-C Eligible Employees by State or Region	Enables you to view 1095-C form data for selected workers by state or region. This report doesn't display workers that you add with EIB.

Integrations

Use these ACA connectors for the IRS Form 1094-C and 1095-C data:

- *ACA Information Returns (AIR) Connector* :
    - Sends ACA registration information to the IRS.
    - Submits ACA tax data under the Affordable Care Act Information Returns (AIR) Program.
    - Retrieves status update messages from the IRS endpoint.
- *ACA Mailing Connector* communicates with CIC Plus, Workday's external mailing service vendor. Set up a business relationship with CIC Plus approximately 2 months before the transmission deadline.

Use these web services to work with software partners that manage form transmission:

- *Get ACA Employer Data* : Retrieves company or employer ACA data for 1094-C state and federal filings.
- *Get ACA Employee Data*: Retrieves employee ACA data for 1095-C forms.

  Note: Workday doesn't mask employee Social Security Numbers (SSN) for the web service.
- *Put Federal ACA Transmission Status*: Generates federal transmission status and details to display in the *ACA Transmission Status* report.
- *Put State ACA Transmission Status*: Generates state transmission status and details to display in the *ACA Transmission Status* report.

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.

Related Information

Concepts

Concept: Worker Eligibility for Affordable Care Act Benefits on page 1483

Concept: Affordable Care Act (ACA) Connectors

Tasks

Steps: Set Up Benefits on page 1237

Steps: Manage Affordable Care Act Measurements and Eligibility on page 1467

Steps: Set Up ACA Forms 1094-C and 1095-C on page 1469

Steps: Set Up ACA Information Returns Connector

Reference

Reference: Worklets and Reports for Affordable Care Act Compliance on page 1492

FAQ: Patient Protection and Affordable Care Act on page 1492

Workday Community: Affordable Care Act (ACA) Reporting Requirements Feature FAQ

Steps: Set Up Affordable Care Act Measurements and Eligibility

Prerequisites

To determine a worker's Affordable Care Act (ACA) benefit eligibility, Workday uses earning codes to retrieve hours of service from Workday Payroll or Payroll Interface. If you don’t use Workday Payroll, you can load hours using the *Affordable Care Act Workers Hours And Wages* EIB.

Set up earnings for:

- Paid hours worked.
- Paid hours not worked: vacation, personal leave, sick, FMLA, jury duty, military service.
- Adjunct faculty hours for unpaid hours not worked: FMLA, USERRA, jury duty, educational institution leave.

To ensure accurate codes:

- For line 14, map the configured spouse relationship type as *Spouse* in the Map Relationship to Workday field of the Maintain Related Person Relationships task.
- For line 16, configure safe harbors in Workday.

Context

Define the standards and other parameters Workday uses to identify and create benefit events for eligible workers.

Workday uses the look-back measurement method to identify full-time workers according to ACA standards.

Steps

1. Review Workday Community: Affordable Care Act (ACA) Checklist.
2. Edit Domain Security Policies.

   Set up the security policy for the *Affordable Care Act (ACA) Administration* domain in the Benefits functional area.
3. Manage Benefit Coverage Types on page 1243.

   For Health Care Coverage Types, select the Medical check box to indicate which coverage types you want Workday to consider as medical.

4. Create Benefit Eligibility Rules on page 1255.

   Create an ACA Measurement Period Eligibility Rule that defines the workers you want to measure. You might want more than 1 rule. Example: You can create rules for:

   - Collectively and noncollectively bargained workers.
   - Salaried and hourly workers.
   - Workers located in different states.

   Note: Don't use the Qualified As Full-time Based on ACA Measurement Periods report field in your new ACA Measurement Period Eligibility Rule.
5. Access the Edit Benefit Eligibility Rule task.

   Modify the existing benefit eligibility rules for benefit groups and plans offered to ACA-eligible workers (including variable and hourly workers).

   Security: *Set Up: Benefits* domain in the Benefits functional area.
6. For Payroll Interface users only, load payroll data using the *Put Affordable Care Act Worker Hours And Wages* web service.

   Enter 1 row for each payslip.
7. Create Affordable Care Act Measurement Periods on page 1475.

   Create a measurement period for new hires and ongoing workers. You need a measurement period for each group of workers that has an ACA measurement period eligibility rule.
8. Create Enrollment Events on page 1343.

   Create a benefit event to use in a passive event rule that sets the measurement period for workers using these criteria:

   - Enrollment Offering Type: Medical.
   - Days to Enroll Calculation: Initiate Date.
   - Days to Enroll:

     Configure this option based on the administrative period configured on the measurement period. The configuration depends on when coverage should begin: either on the first of the month after gaining eligibility, or after a waiting period.

     Set to 31 if the initial measurement administrative period is zero. Coverage begins on the first of the month, following the end date of the measurement period.

     Set to 1 if the initial measurement administrative period is 31 days, so that the submit by date equals the event date.

Related Information

Concepts

Concept: Worker Eligibility for Affordable Care Act Benefits on page 1483

Tasks

Steps: Set Up Benefits on page 1237

Steps: Manage Affordable Care Act Measurements and Eligibility on page 1467

Steps: Set Up ACA Forms 1094-C and 1095-C on page 1469

Reference

FAQ: Patient Protection and Affordable Care Act on page 1492

Workday Community: Affordable Care Act (ACA) Reporting Requirements Feature FAQ

Steps: Manage Affordable Care Act Measurements and Eligibility

Prerequisites

- Set up Affordable Care Act measurements and eligibility.

Context

The Affordable Care Act (ACA) requires employers to offer benefit coverage to employees that are considered full-time according to ACA standards. Worklets and reports help you identify employees and analyze your compliance with the ACA regulations. To offer benefits to eligible employees, run the ACA type passive event and open enrollment.

Steps

1. Schedule Passive Events on page 1445.

   Schedule and run passive events for the benefit event types that you use to track the eligibility of new hires and variable hour, part-time workers. Workday creates records of when eligible workers complete a measurement period.

   Workday recommends running the passive event for each measurement period definition every day to process workers who have a gain or loss of coverage.
2. Run the open enrollment process.

   Workday uses the open enrollment to offer benefits for eligible variable hour, part-time workers. See Steps: Manage Open Enrollment on page 1416.
3. Evaluate your workers' employment, health coverage, and compliance with ACA regulations.

   See Reference: Worklets and Reports for Affordable Care Act Compliance on page 1492.

Related Information

Tasks

Steps: Set Up Affordable Care Act Measurements and Eligibility on page 1466

Steps: Set Up ACA Software Partner Transmission

Prerequisites

- Create ACA 1095-C data.
- Security: *Manage: ACA Partner Integrations* secured to the Benefits domain.

Context

You can enable ACA software partners to extract ACA data to transmit to federal and state entities in the Create 1094-C Company Configuration task. Workday provides web services that enable the ACA software partners to create an integration. We provide a security domain specifically for the ACA partner. You can configure the domain policy so that partners can only access data for the transmission.

Steps

1. *Role: Benefits Administrator* - Configure security for ACA software partners:
   a) Create the *Integration System User* account, which enables you to set up a Workday account for software partners.

      Select Do Not Allow UI Sessions to restrict the account for integrations only.
   b) Select the Security Profile related action from the new Workday account. Select Assign Integrations System Security Groups.
   c) Add the account to an existing or new integrations security group, which must be unconstrained.
   d) Edit the *Manage: ACA Partner Integrations* domain security policy and give the relevant security groups view or modify access.
   e) (Optional) Include the account on Manage Authentication Policies report.
   f) Access and run the Activate Pending Security Policy Changes task.

2. *Role: Benefits Administrator* - Provide an endpoint URL to the ACA Partner:

    a. Sign in to the tenant for your endpoint.
    b. Run the Public Web Services report and locate the ACA Partner Integrations (Public) web service.
    c. From related actions of the web service, select Web Service > View WSDL.
    d. Go to the end of the file and locate this line, where [*link*] is the WSDL ID that you provide.

    ```
    <soapbind:address location =“[link]”>
    ```
3. *Role: ACA Software Partner* - Set up the integration using these web services:

    - *Get ACA Employer Data*: Retrieves company or employer ACA data for 1094-C state and federal filings.
    - *Get ACA Employee Data*: Retrieves employee ACA data for 1095-C forms.

      Note: Workday doesn't mask employee Social Security Numbers (SSN) for the web service. However, the software partner can enter the value of 1 in the Mask SSN field for printing.
    - *Put Federal ACA Transmission Status*: Generates federal transmission status and details to display in the ACA Transmission Status Report.
    - *Put State ACA Transmission Status*: Generates state transmission status and details to display in the ACA Transmission Status Report.
4. *Role: Benefits Administrator* Create an ACA Company Configuration on page 1478.

    Enable federal and state transmissions by ACA software partners in the Enable External ACA Transmission section. When you select either option, you can add and save URLs.

    When you select the External ACA Federal Transmission check box, Workday locks transmissions from Workday to the IRS, which avoids duplicate transmissions.

Result

The ACA partner can access employee data to create IRS and state filings.

Next Steps

Look at the ACA Transmission Status Report to see ACA transmission status.

Related Information

Tasks

Create an ACA Company Configuration on page 1478

Steps: Set Up ACA Forms 1094-C and 1095-C

Prerequisites

Set up Affordable Care Act reporting.

Context

Workday enables you to comply with IRS 1094-C and 1095-C reporting requirements. You can:

- Identify health care plans that:
    - Are self-insured or fully funded.
    - Provide Minimum Essential Coverage (MEC).
    - Provide Minimum Value Coverage (MVC).
- Define employee populations with respect to 1094-C and 1095-C requirements.
- Configure Form 1094-C options by company.

- Create ACA Applicable Large Employer (ALE) groups.
- Create 4980H safe harbor eligibility rules.
- Configure 4980H safe harbors.
- Generate and distribute completed Forms 1094-C and 1095-C.
- Process ACA data for Single Legal Entity (SLE) companies.

Note: Make sure that you understand your compliance requirements before setting up Forms 1094-C and 1095-C. Workday enables you to create Forms 1094-C and 1095-C, but doesn't assume responsibility for compliance.

For details, see:

- About Form 1095-C, Employer-Provided Health Insurance Offer and Coverage Insurance.
- Individual Shared Responsibility Provision - Minimum Essential Coverage.

Steps

1. Access the Edit Benefit Plan task.

   For medical health coverage plans, in the US Affordable Care Act Options section, select:

   - The Funding Method.
   - The check box if the plan provides the ACA Minimum Value Coverage.
   - Whether the ACA Minimum Essential Coverage applies to the employee, the spouse, or dependents. You can also conditionally offer spousal coverage.

   Security: *Set Up: Benefits* domain in the Benefits functional area.
2. (Optional) Access the Create Benefit Eligibility Rule task.

   Determine the employee qualifications for 4980H safe harbor. Create 1 or more ACA 4980H safe harbor eligibility rules if you're going to create a 4980H safe harbor configuration.

   Workday determines the worker population for ACA 1094-C and 1095-C processing based on their full-time status. When you create ACA 1095-C tuning eligibility rules, you can include or exclude that population.

   Security: *Set Up: Benefits* domain in the Benefits functional area.
3. (Optional) Access the Create ACA 4980H Safe Harbor Configuration task.

   Match the 4980H safe harbor to selected employee populations with the 4980H eligibility rule that you created in the previous step. Indicate for which months these 4980H safe harbors apply to the eligible employee groups.

   Security: *Affordable Care Act (ACA) Administration* domain in the Benefits functional area.
4. Access the Create ACA ALE Group task.

   An Applicable Large Employer (ALE) can be a single entity or a group of related entities. A single entity is a company with an Employer Identification Number or a Designated Government Entity. A group of related entities is a parent company and its subsidiaries. Each entity must file a Form 1094-C with the IRS. Each ALE group is associated with 1 calendar year and 1 or more companies for 1 or more specified months.

   Workday uses this data to populate Form 1094-C automatically.

   Use the Maintain ACA ALE Member Order task to sort ALE members from all ALE groups for transmission to the IRS.

   Security: *Affordable Care Act (ACA) Administration* domain in the Benefits functional area.
5. Access the Calculate 1094-C Total and Full Time Employee Counts By Month task.

   For an SLE, Workday rolls up the counts to the main company.

   Security: *Process: ACA Tax Filing 1094-C/1095-C (Run)* domain in the Benefits functional area.
6. Create an ACA Company Configuration on page 1478.

   Define 1094-C company configuration information.

7. (Optional) Access the ACA 1094-C Form/Box Tester and ACA 1095-C Form/Box Tester reports.

   If you use ACA ALE Groups in Workday, the ACA 1094-C Form/Box Tester displays the sorted order of ALE members. You sort the order with the Maintain ACA ALE Member Order task.

   Note: The tester displays the most updated data in Workday, not the data last created from running the Create ACA 1095-C/1094-C Data task. After you complete a data correction, access the Create ACA 1095-C/1094-C Data task to create completed forms.

   Security:

   - *Affordable Care Act (ACA) Administration* domain in the Benefits functional area.
   - *Process: ACA Tax Filing 1094-C/1095-C (Reports)* domain in the Benefits functional area.
8. Access the Create ACA 1095-C/1094-C Data task.

   Workday collects the 1095-C/1094-C data from which you can create employee 1095-C forms. You can run the data creation job as often as necessary. Each time the data creation job runs, Workday overwrites any data that has changed since the previous run.

   Note: You can change the contact information on the 1094-C company configuration after you create the 1095-C data. If you select the Update 1094-C Data Only check box, Workday updates only the contact information when you recreate the 1095-C data. It doesn't update other 1095-C information, such as codes.

   After you create the 1094-C and 1095-C data, Workday provides the option to update the data using the Create ACA 1095-C/1094-C Data (Corrections) task. Select the Prevent 1095-C corrections for previously transmitted forms check box to update 1094-C data only. Workday generates corrections for untransmitted 1095-C forms when necessary, whether or not you select the check box.

   Use the View ACA 1095-C Form Data task to verify the data.

   Workday applies the sorted order of ALE members when you create or view the 1094-C form data.

   If the company is a Single Legal Entity (SLE), Workday creates only 1 1095-C form for each employee who worked in multiple companies within the SLE.

   Security:

   - *Process: ACA Tax Filing 1094-C/1095-C (Run)* domain in the Benefits functional area.
   - *Process: ACA Tax Filing 1094-C/1095-C (Reports)* domain in the Benefits functional area.
9. Import data for dependents that don't exist in Workday, such as COBRA participants and retirees, as well as required data that Workday doesn't generate.

   See Steps: Import ACA 1095-C Recipient Data on page 1473.

   Starting in Tax Year 2020, you need to populate these fields using the *Import 1095-C Form Recipients Data* EIB:

   - Employee's Age on January 1.
   - Line 14 Individual coverage Healthcare Reimbursement Accounts (ICHRA) codes.
   - Line 17.

   After you've imported the data to Workday, you can view it in Workday reports, create 1095-Cs, and send data to the IRS using the ACA Connectors.

   See Prepare ACA Recipient Data for EIB Upload on page 1480.
10. (Optional) Access the Publish Employee 1095-C Forms task.

    Release the forms to self-service employees for viewing and printing the PDF.

    Security: *Process: ACA Tax Filing 1094-C/1095-C (Reports)* domain in the Benefits functional area.

11. (Optional) To make it easier for employees to find the option on mobile devices, add: the 1095-C Printing Election option.

    You can display this option on:

    - The Benefits and Pay Hub with the Maintain Hubs task.
    - The Benefits worklet with the Configure Worklet task.

    Note: The Benefits worklet isn't available on Workday desktop.

    Security: *Set Up: System* domain in the System functional area.
12. (Optional) Access the Maintain ACA 1095-C Sorting Setup task.

    Configure the sorting of fields and where Workday splits files.

    Security: *Process: ACA Tax Filing 1094-C/1095-C* domain in the Benefits functional area.
13. Access the Create ACA 1095-C Forms task.

    Run this task only after employee and dependent data is up to date, and you're ready to send completed forms to the IRS. If you make changes to ACA data after creating 1095-C forms, data in Workday might no longer match the submitted forms.

    a. To send printed 1095-C forms to the IRS, select the Unmask Social Security Numbers check box. This option displays SSNs in the generated PDF.
    b. To include active employees who receive the electronic version, select the Include Workers Opted-Out of Paper Copy check box.

    Security: *Process: ACA Tax Filing 1094-C/1095-C (Run)* domain in the Benefits functional area.
14. Send Form 1094-C and Form 1095-C data to the IRS.

    See Steps: Set Up ACA Information Returns Connector.
15. View and Correct ACA Data Transmission Status on page 1482.

Result

Workday creates the 1094-C and 1095-C forms that you can then send to the IRS electronically. Workday creates separate 1095-C forms for each company that a worker has during the year.

Employees can select Change 1095-C Printing Election on the Benefits and Pay Hub, or the Benefits worklet (on the mobile app only). They can select to receive their completed 1095-C form in both paper and electronic (PDF) or electronic copy only.

Next Steps

View your created forms and 1094-C and 1095-C form data. In addition, access these reports:

- View 1094-C FTE and Total Count Details.

  You can view employee information from all related companies for an SLE.
- View 1095-C Form Recipient Data.

Access the Delete 1095-C Form Data task to delete selected 1095-C recipient data for a specified company and tax year. You can't delete previously transmitted 1095-C recipient data.

Some states in the US require that yo report to verify health coverage. Access the 1095-C Eligible Employees by State or Region report to view worker 1095-C data in a specific state or region.

Related Information
Tasks

Steps: Set Up Affordable Care Act Measurements and Eligibility on page 1466
Create Health Care Plans on page 1289
Steps: Set Up a Single Legal Entity
Set Up Worklets

Reference

FAQ: Patient Protection and Affordable Care Act on page 1492

Steps: Import ACA 1095-C Recipient Data

Prerequisites

Set up ACA Forms 1094-C and 1095-C.

Context

You can import ACA Form 1095-C data into Workday to:

- Add to or update Workday-generated 1095-C data.
- Add COBRA participants who aren't already in Workday.
- Import or update data for retirees who aren't in Workday or aren't included in 1095-C processing.
- Import dependents who aren't in Workday or additional dependent 1095-C data for the employee.

Import recipient data before using the Create ACA 1095-C Forms task.

Steps

1. Edit Domain Security Policies

   Add the Benefits Administrator to Integration Permissions on the *Process: ACA Tax Filing 1094-C/1095-C* domain in the Benefits functional area.

   Select the Put check box.
2. Set Up Inbound EIB.

   Create an inbound EIB based on the *Import 1095-C Form Recipients Data (WS Background Process)* web service operation. Enter *Import 1095-C Form Recipients Data (WS Background Process)* in the Web Service Operation prompt.
3. From the related actions menu of the integration system for the upload, select Template Model > Generate Spreadsheet Template.

   To maintain the correct spreadsheet format, don't change the .xml file extension.

   Security: *Integrations: EIBs*, *Integration Configure*, and *Integration Event* domains in the Integration functional area.
4. Prepare ACA Recipient Data for EIB Upload on page 1480.
5. Launch EIB Spreadsheet Upload.

Next Steps

- Check the EIB spreadsheet upload for errors.
- Run the View 1095-C Form Recipient Data report for the employee or employees to verify the results of the upload. The Generation Source field displays:

WG	Workday Generated
EG	Externally Generated
WE	Workday Generated and then Externally Updated

Note: After import, the Create ACA 1095-C/1094-C Data task regenerates and overwrites WG data. The Delete ACA 1095-C/1094-C Data task deletes data, regardless of its source. Importing 1095-C recipient data overwrites WG data and previously imported EG and WE data.

- Access the View 1095-C Form Recipient Data report to verify the results of the upload. Revise the data in the EIB spreadsheet if necessary and upload again.

Related Information

Concepts

Concept: Integration Security in Workday

Tasks

Set Up EIB Spreadsheet

Customize EIB Spreadsheet Template

Configure Affordable Care Act Reporting

Prerequisites

Security: *Affordable Care Act (ACA) Administration* in the Benefits functional area.

Context

You can define the rules for Workday to use to generate the Affordable Care Act reports.

Steps

1. Access the Affordable Care Reporting Configuration task.
2. As you complete the task, consider:

Option	Description
Lookback Begin Date Lookback End Date	Displays in the Affordable Care Act Dashboard (Do Not Use). Workday uses Lookback Dates in combination with the Paid Hours Standard for Full-Time Status to determine full-time status. The ACA Qualified Employees Enrollment Count and Part-Time Employees Working More Than Federal Full-Time Standard reports use these dates to measure employees with variable hours. Note: These dates don't need to match the Measurement Period dates on the Create ACA Measurement Periods task because they are the dates you use to measure employee eligibility. You can change the lookback dates to look at different periods of times for reporting.
Standard for Paid Hours Per Week Standard for Paid Hours Per Month	Full-time status is based on the paid hours worked and not worked during the period defined by the Lookback Dates. Workday determines paid hours worked or not worked using the values in the Workday Payroll Hours Source: Payroll Calculations list or by using the data you've loaded from an outside source. Example: These amounts can be 30 hours per week and 130 hours per month.

Option	Description
Payroll Calculation for Paid Hours Worked Payroll Calculation for Paid Hours Not Worked (PTO)	For Workday Payroll only, select 1 or more Payroll calculations for each prompt: Paid Hours Worked and Paid Hours Not Worked.
Rehire Gap	When evaluating the employee for benefits eligibility, Workday treats a rehire as a new hire if their gap in service exceeds these amounts: • 13 Weeks • 26 Weeks Note: Only qualified educational institutions as defined in Treasury Regulation 4980H should use the 26-week rehire gap.
Use Rule of Parity	Select the Use Rule of Parity check box to treat rehired workers as new hires if their break in service is: • Greater than 4 weeks. • Fewer than the 13 or 26 weeks of the rehire gap you selected. • Greater than their preceding period of employment. Example: Ralph worked 12 weeks, was terminated, and started work again 16 weeks after termination. With the Use Rule of Parity check box selected, Workday treats him as a new employee for ACA reporting purposes. Ralph's break in service was 16 weeks, which meet all rule of parity criteria.
Includes Leaves of Absence	Select the Include Leaves of Absence check box to use leaves to determine the start date for the ACA initial measurement period.
Minimum Weeks	Set Minimum Weeks to 13 or higher.

Create Affordable Care Act Measurement Periods

Prerequisites

- Review the Affordable Care Act (ACA) Checklist.
- Security: *Affordable Care Act (ACA) Administration* in the Benefits functional area.

Context

You can define these periods in Workday for new hires and ongoing workers with variable hours:

- Measurement Period: The date interval used to determine a worker's eligibility for benefit coverage.
- Administrative Period: The date interval that employers can use to enroll ACA full-time eligible workers into benefit coverage.
- Stability Period: The date interval during which ACA full-time eligible workers are eligible for benefit coverage.

Depending on the groups of employees you want to measure, you might have more than 1 measurement period definition. Create new measurement period definitions every year.

Workday automatically adjusts administrative periods to adhere to these requirements:

- New hires: The stability start date must be 14 months or less from the start date of the measurement period.
- New hires and ongoing workers: The stability start date must be 91 days or less from the end date of the measurement period.

Steps

1. Access the Create ACA Measurement Period task.
2. As you complete the task, consider:

Option	Description
Measurement Period Eligibility Rule	A group of employees that are eligible through this measurement period definition.
Use 2015 Transition Measurement Period Rules	Workday sets the Stability Period Duration (Months) to 12 months if you select and enter a number between 6 and 12 for Measurement Period Duration (Months). Note: The Measurement Period Start Date must be on or before 2014-07-01.

3. As you complete the Ongoing Measurement Period section, consider:

   Workday generates measurement history for the ongoing measurement period when all of these conditions are true:

   - The Measurement Period Start Date is after the Initial Period Begin Date.
   - The Measurement Period End Date is before Today.
   - The Initial Stability End Date is before Today. Or, the Initial Stability Start date is on, or before, Today and the initial measurement period for ACA full-time employees is *No*.

Option	Description
Measurement Period Start Date	The measurement period dates don't need to match the Lookback dates on the Affordable Care Reporting Configuration task.
Administrative Period Duration (Days)	Number of days for workers to enroll in benefit coverage. The days can't be more than 90. Workday recommends that you set the Stability Period Start Date to coincide with your Open Enrollment Event Date and the Coverage Begin Date for new elections.
Stability Period Start Date Stability Period End Date	The dates through which you must offer coverage. For new hires, Workday automatically calculates the stability period start and end dates based on the worker's hire date. Automatically populated from the Measurement Period Start Date, Measurement Period Duration (Months), and Administrative Period Duration (Days).

Option	Description
Stability Period Duration (Months)	Automatically populated from the Measurement Period Duration (Months).
Include in Passive Event Processing	Select the check box when there's a change in eligibility and you want to: • Create a passive event. • Send passive alerts. Workday recommends enabling this option when your ongoing measurement periods don't align with open enrollment. Example: You have 6-month measurement and stability periods. Passive event processing creates a benefit event for ACA-eligible employees at the end of ongoing measurement periods. Clear the check box if the passive event overlaps with an active open enrollment. Example: You have a 12-month measurement period that aligns with open enrollment. Workday offers medical coverage to ACA-eligible employees during open enrollment.

4. As you complete the New Hire Measurement Period section, consider:

Option	Description
Measurement Period Duration (Months) Stability Period Duration (Months)	Workday derives the duration from the ongoing Measurement Period Duration (Months).
Admin Period Duration Before Measurement Period (Days) Admin Period Duration After Measurement Period (Days)	To meet the 14-month or partial administrative month rules, Workday might adjust the start date for the stability period when creating the benefit event.

Example

This example illustrates how to set up the Ongoing Measurement Period section with these settings:

- Stability start date as January 1.
- Stability end date as December 31.
- Measurement duration of 12 months.

Field	Enter
Measurement Period Start Date	November 1, 2014
Measurement Period Duration (Months)	12
Measurement Period End Date	Automatically populates with October 31, 2015.
Administrative Period Start Date	Automatically populates with November 1, 2015.
Administrative Period Duration (Days)	61
Administrative Period End Date	Automatically populates with December 31, 2015.
Stability Period Start Date	Automatically populates with January 1, 2016.
Stability Period Duration (Months)	Automatically populates with 12.
Stability Period End Date	Automatically populates with December 31, 2016.

Related Information

Tasks

Steps: Set Up Affordable Care Act Measurements and Eligibility on page 1466

Reference

Workday Community: Affordable Care Act (ACA) Checklist

Create an ACA Company Configuration

Prerequisites

- Configure each Employer Identification Number (company) or a Designated Government Entity (DGE) you're reporting on.
- Create ACA Applicable Large Employer (ALE) groups and calculate the 1094-C Total and Full-Time Employee Counts By Month.
- Create ACA tuning eligibility rules by accessing the Create Benefit Eligibility Rule task.
- Security: *Affordable Care Act (ACA) Administration - USA* in the Benefits functional area.

Context

The ACA company configuration defines your choices for ACA 1094-C and 1095-C forms and reporting. You can specify who receives a 1095-C form and select the eligibility tuning rules. You can also configure ALE and DGE groups for Part I, II, and III.

Steps

1. Access the Create ACA 1094-C Company Configuration task.
2. Select the Include Retirees check box to produce 1095-C forms for retired former employees that you track in a retiree organization.

   To ensure that retirees, get a 1095-C, they must meet these criteria. They:

   - Have been terminated from the company.
   - Belong to a Retiree Organization.
   - Have enrolled in self-insured medical coverage for at least 1 month during the reporting year.
   - Retired before the reporting year. Example: For the 2020 reporting year, employees must have become retired in 2019 or earlier. If they were terminated in 2019, but became officially retired in 2020, they won't receive a 1095-C.
3. (Optional) Select ACA 1095-C tuning eligibility rules that Workday uses to include or exclude the worker population for ACA 1094-C and 1095-C processing.

   Workday uses the date on which you create the ACA data to determine whether to include or exclude a subset of employees.

   Example: Workday determines that 3,496 workers are subject to ACA 1094-C and 1095-C processing. The Benefits administrator sets up an ACA 1095-C tuning eligibility rule using the Create Benefit Eligibility Rule task. They select a condition for the eligibility rule, which involves 196 workers. They then select that eligibility rule in the Exclude ACA 1095-C Tuning Eligibility Rule Workers field. This action removes 196 workers from the original 3,496. Workday then processes a total of 3,300 workers.

   Note: Using tuning eligibility rules can affect performance when creating or correcting 1095-C forms.

   Security: *Affordable Care Act (ACA) Administration* in the Benefits functional area.

4. In the Enable External ACA Transmission section, select the appropriate check box to enable third-party ACA software partners to handle transmission to federal or state agencies. See Steps: Set Up ACA Software Partner Transmission on page 1468.

   When you enable external transmissions, you can then add and save URLs.

   Workday prevents duplicate 1094-C and 1095-C transmissions to the IRS when:

   - You select the External ACA Federal Transmission check box in the Create 1094-C Company Configuration task. This check box indicates that you plan to use a certified software partner to manage your transmissions to the IRS.
   - Workday receives confirmation that the ACA Software Partner has transmitted the 1094-C and 1095-C data to the IRS and updates the ACA Transmission Status Report.

   Note: When ACA software partners extract employee data using the *Get ACA Employee Data* web service, Workday doesn't mask employee Social Security Numbers (SSN). However, the software partner can enter a value of 1 in the Mask SSN field to mask SSNs for printing.
5. Select the Use coverage end date in month of termination check box to display a coverage offer for the full month of termination.

   This option applies to terminated workers that get coverage for the full month and the termination occurs during a month in the reporting year. Selecting this check box:

   - Has no effect on months after termination.
   - Treats Line 14 as an offer, not 1H.
   - Populates Line 15 with the employee-required contribution value.
   - Treats Line 16 as 2C if the employee has enrolled in the offered coverage.
6. Select the 2-digit month number for the Plan Start Month field.

   Starting in Tax Year 2020, the IRS requires this value, which Workday uses for each employee. You can update the value for an individual employee in the *Import 1095-C Form Recipients Data* EIB.
7. If you enter content in any field in the Part I Applicable Large Employer Member (ALE Member) section, you must complete all of these fields:

   - Name of ALE Member (Employer)
   - Street address (including room or suite no.)
   - City or town
   - State or province
   - Employer ISO country code (2 letter)
   - Employer ZIP or foreign postal code
   - First name of person to contact
   - Last name of person to contact
   - Contact telephone number
8. As you complete Part III ALE Member Information—Monthly, consider:

Same Minimum Essential Coverage settings for all 12 months?	Select to provide the same minimum essential coverage for all 12 months.
Full-Time Employee Count for ALE Member (Calculated)	The Calculate 1094-C Total and Full Time Employee Counts By Month task populates this column. Zeroes indicate that you haven't run the task. Security: *Process: ACA Tax Filing 1094-C/1095-C (Run)* in the Benefits functional area.
Full-Time Employee Count for ALE Member (Override)	The Calculate 1094-C Total and Full Time Employee Counts By Month task doesn't affect the override values.

	Security: *Process: ACA Tax Filing 1094-C/1095-C (Run)* in the Benefits functional area.
Total Employee Count for ALE Member (Calculated)	The Calculate 1094-C Total and Full Time Employee Counts By Month task populates this column. Zeroes indicate that you haven't run the task. Security: *Process: ACA Tax Filing 1094-C/1095-C (Run)* in the Benefits functional area.
Total Employee Count for ALE Member (Calculated)	The Calculate 1094-C Total and Full Time Employee Counts By Month task doesn't affect the override values. Security: *Process: ACA Tax Filing 1094-C/1095-C (Run)* in the Benefits functional area.
(d) Aggregated Group Indicator	For a Company in an ALE group, Workday populates this column based on the Create ACA ALE Group task configuration.
ACA ALE Group(s)	For a Company in an ALE group, Workday populates this column based on the Create ACA ALE Group task configuration.
All 12 Months	Select to display *Yes* for the All 12 Months column on the 1094-C form.

Related Information
Tasks
Steps: Set Up ACA Software Partner Transmission on page 1468

Prepare ACA Recipient Data for EIB Upload

Prerequisites

Import recipient data and access the Create ACA 1095-C/1094-C Data task.

Context

Prepare 1095-C recipient data in an EIB spreadsheet to launch an EIB upload.

Steps

1. Access the View 1095-C Form Recipient Data report and export the results to an Excel file.

2. Copy the exported data into the Import 1095-C Form Recipients Data EIB spreadsheet template and modify.
    a) Start at the cell labeled Employee.
    b) Navigate to the cell labeled Row ID in the Line 17 Covered Individuals section (column BF). Select all the data to the end of the spreadsheet, and paste it 1 column to the right (column BG).
    c) Enter a numeric value in every row of the Header Key column to associate the employee or dependent with the correct Applicable Large Employer (ALE). The Header Key must match the Header Key in section 1 of the template.

        Examples:

        - Enter 1 in every row of the Header Key column if you have only 1 ALE.
        - Enter 1 in all rows for ALE 1 and 2 in all rows for ALE 2 if you have 2 ALEs.
    d) For each recipient you add to the spreadsheet, enter a valid Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN).

        Data exported from the View 1095-C Form Recipient Data report contains masked digits for the SSN or ITIN for security purposes.

        Don't correct SSNs or ITINs that you export to the spreadsheet from Workday. Correct them in Workday before running the View 1095-C Form Recipient Data report. This action keeps the SSNs updated at the source and prevents future discrepancies.
    e) In the Line Key column, enter a unique value for each employee.

        Start with 1 and increment each row by 1.

        Each employee has 1 row for them self and 1 or more rows for each of their dependents. Each dependent must have the same value for Line Key as the employee. Example:

Header Key	Line Key	Employee
1	1	Emp_0001
1	1	
1	1	
1	2	Emp_0002
1	3	Emp_0003
1	3	
1	3	

Header Key	Line Key	Employee
1	4	Emp_0004

f) Enter a unique Row ID for each covered individual.

Start at 1 for the employee and increment by 1 for each dependent.

Note: During the import, Workday generates and assigns a reference ID to each covered individual.

g) Enter a 2-digit numerical value for the month In the Plan Start Month column.

Starting in Tax Year 2020, the IRS requires this value, which Workday uses for each employee.

You can update individual employee values in the EIB, but not from the Create ACA 1095-C Company Configuration task.

h) (Optional) Enter a whole number from 1-120 in the Employee's Age on January 1 field. Required if you've used any of the codes for Individual Coverage Health Reimbursement Accounts (ICHRA).

i) Line 14: Enter these ICHRA codes, as needed.

- 1L
- 1M
- 1N
- 1O
- 1P
- 1Q

j) Enter the employee's zip code in all applicable month columns for Line 17, if you've used any of the codes for individual coverage HRAs.

Enter the zip code for the lowest cost silver plan used to calculate the Employee Required Contribution in line 15.

View and Correct ACA Data Transmission Status

Prerequisites

- Schedule an integration to transmit 1094-C and 1095-C data to the IRS.
- Security: *Process: ACA Tax Filing 1094-C/1095-C - USA* domain in the Benefits functional area.

Context

When you, or a third-party ACA Software Partner, transmit 1094-C and 1095-C forms, the IRS responds immediately upon receiving the data. While the IRS might take several days to process large volumes of data, you can view returned data and correct erroneous 1094-C and 1095-C forms. Internal transmissions are transmissions that you send. An ACA Software Partner manages external transmissions for you, including troubleshooting and resubmitting rejected transmissions.

Steps

1. Access the ACA Transmission Status Report.
2. As you complete this task, consider:

Option	Description
Transmission Type	The type of external state and federal transmissions. The value can be:

Option	Description
	• *Original*: The transmission by the ACA Software Partner for either state or IRS filing. • *Correction*: A transmission that the ACA Software Partner has corrected and resubmitted. • *Replacement*: A transmission that the ACA Software Partner has sent as a replacement for an erroneous transmission.
Correction	For internal transmissions, indicates that the transmission type is a correction.
Transmission Status	Indicates if the IRS or state entity has accepted the transmission. The value can be either *Accepted* or *Accepted with Errors*.

3. To view errors for internal transmissions:
    a) Click View Integration Event to display transmission errors or 1095-C records with errors.
    b) Select any 1095-C error record to view that worker's 1095-C information.
    c) Click View 1095-C to view the 1095-C form data for a worker or external recipient.
    d) Click View Transmission or View Authoritative Transmission to view transmission errors and included 1095-C records with errors for a worker or an external recipient.
4. Correct the errors in the 1095-C records:
    - For worker 1094-C and 1095-C data, access the Create ACA 1095-C/1094-C Data (Corrections) task.
    - For external recipient 1094-C and 1095-C data, edit the EIB spreadsheet.

    Note: Wait until all the transmissions are complete with an *Accepted* or *Accepted with Errors* status before you create the corrected 1095-C records.
5. Launch an integration to send the corrected data to the IRS after the IRS has completed processing all your data.

Related Information

Tasks

Steps: Set Up ACA Forms 1094-C and 1095-C on page 1469

Concept: Worker Eligibility for Affordable Care Act Benefits

Workday uses passive events to identify eligible workers, based on average hours, records, and measurement history for benefits according to Affordable Care Act (ACA) standards. Using the ACA Measurement Period Eligibility Rule, Workday can determine whether:

- You must record a measurement period.
- A worker's hours during a measurement period qualify the worker as full-time.

Workday displays the result in the Qualified As Full-time Based On ACA Measurement Period field. The *If there is an effect on employee benefits?* condition rule then determines whether to create a benefit event or not.

For ongoing workers, Workday determine eligibility for variable-hour part-time employees and uses Open Enrollment to offer them coverage. When you add the Qualified As Full-time Based On ACA Measurement Period field to eligibility rules for the benefit group and plan, Workday considers those workers for open enrollment.

Record ACA History

Workday follows this logic to determine what to include in the history record.

1. Identify workers using the ACA eligibility rule assigned to the passive event.
2. Among the eligible workers, find any who have completed a measurement period. Example: Where today's date is later than the worker's measurement period end date.
3. For those workers, if the start and end dates don't already exist in history for the:
    - Initial measurement period, then write an initial history record.
    - Ongoing measurement period, then write a standard (ongoing) history record.

Define the Full-Time Workers Eligible for ACA Benefits

Workday follows this logic to populate the Qualified As Full-time Based On ACA Measurement Period field.

1. Identify workers using the eligibility rule from the passive event.
2. For each worker, evaluate the Qualified As Full-time Based On ACA Measurement Period field:
    a. Get the payroll hours applicable to the measurement period.
    b. Calculate Average Month or Average Week:
        - Average Month = total hours / # of duration months
        - Average Week = total hours / # of duration weeks
    c. On the Affordable Care Reporting Configuration task:
        - If *Average Month* ≥ Standard for Paid Hours Per Month, or
        - If *Average Week* ≥ Standard for Paid Hours Per Week

    Then the Qualified As Full-time Based On ACA Measurement Period field = *True*.
3. If the Qualified As Full-time Based On ACA Measurement Period field = *True*, then run the *If there is an effect on employee benefits?* condition rule to determine whether to create a benefit event or not.

Related Information

Tasks

Steps: Set Up Affordable Care Act Measurements and Eligibility on page 1466

Steps: Manage Affordable Care Act Measurements and Eligibility on page 1467

Reference

FAQ: Patient Protection and Affordable Care Act on page 1492

Reference: Affordable Care Act 1095-C Form Codes

This page provides a quick reference to 1095-C code explanations, taken from the IRS Instructions for Forms 1094-C and 1095-C. The Workday Tips column provides quick reference information and additional information.

Seek the advice of your legal counsel regarding any concerns or differences in interpretation, as you're ultimately responsible for Affordable Care Act (ACA) compliance. Customers who need to report different codes (due to differences in interpretation, edge cases Workday doesn't support, or any other reason) need to load those codes using the *Import 1095-C Form Recipient Data* EIB.

Line 14: Offer of Coverage

Line 14 defines who was offered coverage and what type of coverage you offered. The codes apply when the offer of coverage is for all days of the month. Fill in this line for every month. Specify these values on the benefit plan definition:

- Plan funding type.
- Minimum value coverage and minimum essential coverage for employee, spouse, and dependents.
- Conditional spousal coverage.

Code	Explanation	Workday Tips	
1A	Qualifying offer includes these coverages and costs: • Minimum essential coverage providing minimum value offered to full-time employees. • The lowest cost for employee-only coverage is equal to or less than 9.5% (as adjusted) of the mainland single federal poverty line. • Minimum essential coverage offered to spouse and dependents.	Affordable coverage for only the employee and coverage for a spouse and dependents. Don't populate cost on line 15 if using this code. The IRS instructions note that the adjusted percentage is 9.61% for plan years beginning in 2022, and 9.12% for plan years beginning in 2023 (p. 13). Workday research indicates that the 2022 poverty line of $13,590 applies to coverage offered in the 2023 tax year. Thus affordable care is equal to or less than $103.28 per month, for employee only coverage. Enter the poverty line and adjusted percentage value on the Affordable Care Reporting Configuration page.	
1B	Minimum essential coverage providing minimum value offered to the employee only.	Employee only	
1C	Minimum essential coverage providing minimum value offered to the employee and at least minimum essential coverage offered to dependents (not spouses).	Employee + dependents (not spouse)	
1D	Minimum essential coverage providing minimum value offered to the employee and at least minimum essential coverage offered to spouse (not	Employee + spouse (no dependents)	

Code	Explanation	Workday Tips	
	dependents). Don't use code 1D if you offer the coverage for the spouse conditionally. Instead use code 1J.		
1E	Minimum essential coverage providing minimum value offered to the employee and at least minimum essential coverage offered to dependents and spouse. Don't use code 1E if you offer the coverage for the spouse conditionally. Instead use code 1K.	Employee + dependents and spouse	
1F	Minimum essential coverage *not* providing minimum value offered to the employee; employee and spouse or dependents; or employee, spouse, and dependents.	Cost of employee-only coverage doesn't meet affordability standard.	
1G	Offer of coverage for at least 1 month to an individual who doesn't meet 1 or more these conditions: • An employee for any month of the year. • An employee who wasn't a full-time employee for any month of the year and was enrolled in self-insured coverage 1 or more months of the year. This period might include 1 or more months in which the individual wasn't an employee.	Part-time employees or retirees in self-insured coverage. 1G applies to the entire year or not at all.	
1H	No offer of coverage. You didn't offer the		

Code	Explanation	Workday Tips	
	employee health coverage or you offered employee-offered coverage that: • Isn't minimum essential coverage. • Might include one or more months in which the individual wasn't an employee.		
1I	Reserved. Not applicable for TY2023.		
1J	Minimum essential coverage providing minimum value offered to the employee and at least minimum essential coverage conditionally offered to spouse; minimum essential coverage not offered to dependents.	Employee + spouse with conditional coverage (no dependents)	
1K	Minimum essential coverage providing minimum value offered to the employee; at least minimum essential coverage offered to dependents; and at least minimum essential coverage conditionally offered to spouse.	Employee + dependents and spouse with conditional coverage	
1L	Individual coverage HRA (ICHRA) offered only to the employee. Affordability based on ZIP code of employee's primary residence.	ICHRA for an employee only. Affordability based on employee residence. Workday doesn't derive this code. Load with the EIB.	
1M	ICHRA offered to the employee and dependents (not spouse). Affordability based on ZIP code of employee's primary residence.	ICHRA for the employee + dependents (not spouse). Affordability based on employee residence. Workday doesn't derive this	

Code	Explanation	Workday Tips	
		code. Load with the EIB.	
1N	ICHRA offered to the employee, spouse, and dependents. Affordability based on ZIP code of employee's primary residence.	ICHRA for the employee + dependents and spouse. Affordability based on employee residence. Workday doesn't derive this code. Load with the EIB.	
1O	ICHRA offered only to the employee. Using employee's primary employment site ZIP code affordability safe harbor.	ICHRA for an employee only. Affordability based on employee work site safe harbor. Workday doesn't derive this code. Load with the EIB.	
1P	ICHRA offered to the employee and dependents (not the spouse). Using employee's primary employment site ZIP code affordability safe harbor.	ICHRA for the employee + dependents (not spouse). Affordability based on employee work site safe harbor. Workday doesn't derive this code. Load with the EIB.	
1Q	ICHRA offered to the employee, spouse, and dependents. Using employee's primary employment site ZIP code affordability safe harbor.	ICHRA for the employee + dependents and the spouse. Affordability based on employee work site safe harbor. Workday doesn't derive this code. Load with the EIB.	
1R	ICHRA that is *not* affordable and offered to any of these combinations of covered individuals: • Employee only • Employee + Spouse/Partner • Employee + Dependent	ICHRA not affordable. Workday doesn't derive this code. Load with the EIB.	

Code	Explanation	Workday Tips	
	• Employee + Spouse + Dependent		
1S	ICHRA offered to an individual that isn’t a full-time employee.	ICHRA offered to an individual that isn't a full-time employee. Workday doesn't derive the code. Load with the EIB.	

Line 15: The employee's share of the lowest-monthly cost for employee-only coverage that you offered.

Line 15 answers the question: What was the cost of the offered coverage?

If the lowest employee-only coverage offered doesn’t meet the affordability standard, enter the lowest monthly cost. Populate this line only if one of these codes is in line 14:

- 1B
- 1C
- 1D
- 1E
- 1J
- 1K

Note: Enter 0.00 if employee cost is zero. Don't leave it blank.

Line 16: Applicable Section 4980H Safe Harbor

Line 16 answers these questions:

- Did the employee enroll in coverage?
- If the employee wasn't offered coverage, why not?

If the worker waived coverage and there are no applicable safe harbors, line 16 can be blank.

To apply the safe harbors:

1. Create a 4980H Safe Harbor Eligibility Rule to identify which workers the safe harbor provision (or provisions) applies to.
2. Create ACA 4980H Safe Harbor Configuration to designate the specific safe harbor provisions for the reporting year and apply the eligibility rules as appropriate.

Note: You can use affordability safe harbors to determine affordability based on the interim guidance for multiemployer arrangements. Use code 2E if the employer is eligible for the relief provided in the interim guidance for multiemployer arrangements.

Code	Explanation (IRS Text)	Workday Tips
2A	The person isn't an employee for any day during the month. Don’t use this code if the person was an employee on any day in the month, including the month in which you hired or terminated the employee.	Not employed.
2B	Employee isn’t a full-time employee. Enter code 2B if:	Not full-time.

Code	Explanation (IRS Text)	Workday Tips

	• Employee isn't full time for the month and didn't enroll in minimum essential coverage, if offered for the month
	• Employee is full time for the month. The offer of coverage (or coverage, if enrolled) ended before the last day of the month because they terminated during the month. Otherwise, the coverage, or offer of coverage, would have continued.
		For a month in which you terminated the employee before the last day, Workday:
		• Automatically derives the codes 1H and 2B.
		• Derives the codes applicable at termination if both:
		  ◦ The employee's coverage extends to the end of the month.
		  ◦ You select the Use coverage end date in month of termination check box on the 1094-C Company Configuration.
		For subsequent months, even if you extend the coverage after termination, the codes are 1H/2A.

2C	You employ and enroll the employee for all days of the month. Use regardless of whether any other code could apply (except for 2E). Don't use 2C: • 2C if 1G is applicable for full year on line 16 because the employee wasn't full time for any month. • For any month that an employee was in COBRA or other postemployment coverage (use code 2A). • For any month in which the multiemployer interim rule relief applies (enter code 2E). • For any month in which a terminated employee enrolls in COBRA continuation coverage or other postemployment coverage (use code 2A). • For any month in which the employee enrolled in coverage that wasn't	Enrolled in medical coverage.

Code	Explanation (IRS Text)	Workday Tips
	minimum essential coverage.	
2D	Employee in Limited Non-Assessment Period (regardless of whether employee is full-time or part-time). If employee is in LNAP AND employer is eligible for multiemployer interim rule relief for the month, use 2E.	In waiting period (LNAP).
2E	Multiemployer interim rule relief. For any month in which the interim guidance for multiemployer arrangements applies for the employee, regardless of whether any other code might apply.	Multiemployer interim rule relief
2F	Employer used the section 4980H Form W2 safe harbor to determine affordability for purposes of section 4980H(b) for this employee for the year. If you use this safe harbor for an employee, use it for all months of the calendar year during which the employee is offered health coverage.	Section 4980H affordability Form W-2 safe harbor
2G	Employer used the section 4980H federal poverty line safe harbor to determine affordability for purposes of section 4980H(b) for this employee for any months.	Section 4980H affordability federal poverty line safe harbor
2H	Employer used the section 4980H rate of pay safe harbor to determine affordability for purposes of section 4980H(b) for this employee for any months.	Section 4980H affordability rate of pay safe harbor
2I	Reserved. Not applicable for TY2023.	

Line 17: ZIP Codes for ICHRA Participants

When using ICHRA codes in Line 14, enter the ZIP code of the employee's residence, or the primary work site when using the work location safe harbor. Workday doesn’t derive these ZIP codes. Load them with the Import 1095-C Form Recipients Data EIB spreadsheet.

Related Information

Tasks

Prepare ACA Recipient Data for EIB Upload on page 1480

Steps: Import ACA 1095-C Recipient Data on page 1473

Reference: Worklets and Reports for Affordable Care Act Compliance

Workday provides worklets and reports for you to analyze compliance with ACA regulations for full- and part-time employees.

Report	Description
ACA Qualified Employees Enrollment Count	Lists employees not enrolled in a medical plan who are full-time, according to ACA standards.
Part-Time Employees Working More Than Federal Full-Time Standard	Displays part-time employees working full time according to set up in the Part-Time Evaluation section on the Affordable Care Reporting Configuration task.
View Affordable Care Act Workers Hours and Wages	Displays payroll data used to evaluate employee full-time status.
Benefits > View ACA Measurement History	Displays the ACA-defined initial, administrative, and stability periods used to evaluate the employee's full-time status. Access from the employee's related actions menu.
1095-C Eligible Employees by State or Region	Displays 1095-C form data for selected workers by state or region for the current tax year.

FAQ: Patient Protection and Affordable Care Act

- How does Workday determine who gets a 1095-C form? on page 1492
- How does Workday determine for ACA that a worker is employed full-time?
- How does Workday calculate Average Monthly and Weekly Hours?
- How does Workday Payroll or Payroll Interface coordinate with ACA requirements?
- How does Workday determine if coverage was offered for each month?
- How does Workday determine if the benefit plan meets ACA requirements?
- How does Workday process rehired workers?
- How do I handle adjunct faculty who work 10 months of a 12-month measurement period?

How does Workday determine who gets a 1095-C form?	Full-Time Employees that have weekly scheduled hours of 30 hours or more at any point in the calendar year. You can configure the number of hours on the Affordable Care Reporting Configuration page. Employees that qualify as Full-Time (FT) if the ACA Measurement Period field value has been Y at any point during the calendar year. This group is your part-time population who you don't automatically offer medical coverage. They're measured to evaluate eligibility over a measurement period. Part-Time Employees who don't qualify as ACA FT, and enroll in coverage under a self-insured plan. Note: Part-time employees receive a form if they're ACA FT-qualified, or if you offer them coverage in a fully funded plan.

How does Workday determine for ACA that a worker is full-time employee?	Workday considers a worker as full-time if: • Scheduled Weekly Hours is greater than or equal to the Standard for Paid Hours Per Week on the Affordable Care Reporting Configuration task. Workday reads these values on the first and last days of each month. • The worker has completed a measurement period, and the actual hours were greater than or equal to the Paid Hours Standard.

How does Workday calculate Average Monthly and Weekly Hours?	If you select the Use Scheduled Hours for Exempt Workers option on the Affordable Care Reporting Configuration task, Workday:
	• Uses this formula to calculate average monthly paid hours:
	`# Of Weeks within Date Range rounded to nearest 100th * Worker's Weekly Scheduled Hours / # Of Months within Date Range`
	• Uses this formula to calculate average weekly paid hours:
	`# Of Weeks within Date Range rounded to nearest 100th * Worker's Weekly Scheduled Hours / # Of Weeks within Date Range rounded to nearest 100th`
	If you select the Use Actual Payroll Hours for Exempt Workers option, Workday:
	• Uses this formula to calculate average monthly paid hours:
	`# Of Hours within Date Range / # Of Months within Date Range`
	• Uses this formula to calculate average weekly paid hours:
	`# Of Hours within Date Range / # Of Weeks within Date Range rounded to nearest 100th`
	Workday determines the:
	• Worker's Weekly Scheduled Hours from the position or job.
	• # Of Months within Date Range from the End Date - Start Date, rounded up to the month.
	• # Of Weeks within Date Range rounded to nearest 100th from the End Date - Start Date / 7.
	• # Of Hours within Date Range from Workday Payroll plus any imported hours.

How does Workday Payroll or Payroll Interface coordinate with ACA requirements?	When using the lookback method to determine employees full-time status (30 hours per week or 130 hours per month), you must: • Workday Payroll: Configure the ACA measurement period. Map both paid hours worked and paid hours not worked from Workday Payroll results. • Payroll Interface: Import paid hours worked and paid hours not worked from an outside source. To populate Form 1095-C, lines 14 and 16 correctly, Workday must accurately detect employees in an initial measurement period. An initial measurement period, known as a limited nonassessment period by ACA, is for these types of employees: • Variable-hour, part time. • Newly hired, full-time in a 3-month waiting period.
How does Workday determine if an employee received an offer of coverage for each month?	Workday uses the benefit event history to determine when the employee received an offer for medical plan coverage.
How does Workday determine if the benefit plan meets ACA requirements?	Workday determines a benefit plan meets ACA requirements if: • It's a medical coverage plan. • The Funding Method is *Fully-Funded* or *Self-Insured*. • The plan provides the Minimum Essential Coverage. • The Minimum Value Coverage applies to the employee, the spouse, or dependents.
How does Workday process rehired workers?	If you terminate and rehire a worker, Workday checks for a 13-week gap. For educational organizations, Workday uses a 26-week gap. • If the gap is greater than or equal to 13 weeks, then Workday processes the worker as a new hire. • If the gap is less than 13 weeks, Workday processes the worker as a rehire. If there’s payroll data that supports their eligibility for benefits, then Workday resumes regular benefit processing with the condition rule: *If there is an effect on the employee benefits?* This condition rule determines whether or not to create a benefit event, enabling the worker to enroll in benefits.
How do I handle adjunct faculty who work 10 months of a 12-month measurement period?	If an employee has any of these types of unpaid leave with unrecorded hours, you must account for the unrecorded hours:

- The Family and Medical Leave Act of 1993.
- Uniformed Services Employment and Re-employment Rights Act of 1994.
- Jury duty.
- Educational institutions with lapses in employment of at least 4 consecutive weeks.

Set up earnings and the related calculations to retrieve hours of service from Workday Payroll or Payroll Interface. Make sure to include lapses in employment that you want to account for in the Workday Payroll Hours Source: Payroll Calculations section on the Affordable Care Reporting Configuration task.

Related Information

Tasks

Steps: Set Up ACA Forms 1094-C and 1095-C on page 1469

Reference

Workday Community: Affordable Care Act (ACA) Reporting Requirements Feature FAQ

Troubleshooting: 1095-C IRS Transmission Errors

Troubleshoot transmission errors when sending 1095-C data to the Internal Revenue Service (IRS).

Cause: 1095-C forms have incorrect or missing information.

Solution: Correct 1095-C forms using the *Import 1095-C Forms Recipients Data* EIB.

IRS Error Code	Solution
AIRBR625	Add missing Social Security Number (SSN) or Date of Birth (DOB) values.
AIRBR626	Correct any SSNs that have sequential numbers. Example: 123-45-6789.
AIRBR627	Correct any SSNs that have all the same digits. Example: 111-11-1111.
AIRBR628	Correct any DOB with a date in the past, as of the transmission date.
AIRBR804	Add employer missing phone number.
AIRBR835	Adjust either the full-time employee count or the total employee count for any month. The total number of employees must be greater than or equal to the number of full-time employees for the month.
AIRBR1006	Upload any missing Offer of Coverage values for workers.
AIRBR1011	Upload a cost for any months with an offer of coverage, but the coverage doesn't qualify for code 1A for missing workers.

IRS Error Code	Solution
	If Line 15 is blank for 1 or more workers with a 1B, 1C, 1D, or 1E in Line 14, then add the costs in Line 15 for the corresponding months.

Cause: Mismatches between Workday and IRS in the 1095-C data.

IRS Error Code	Issue
Shared-007	The name and birth date don't match for 1 or more covered individuals between Workday and the IRS.
Shared-008	The name and SSN don't match for one or more covered individuals between Workday and the IRS.

Solution: Check for typos to the name and DOB and upload the changes with the *Import 1095-C Forms Recipients Data* EIB. Contact the IRS to confirm the data on file in order to correct within Workday. IRS contact information:

- Email: airmailbox@irs.gov
- Telephone: +1(866) 937-4130

Cause: Errors in the company configuration - ALE groups.

Solution: Correct information in the Part I Applicable Large Employer Member (ALE Member) section of the 1094-C Company Configuration task.

IRS Error Code	Solution
AIRBR902	Add the employer contact name.
AIREX126, AIRTN500	Check for typos in the employee EIN; the listed EIN doesn't match the IRS information for the employer.

Cause: Section III coverage errors for months of the year.

Shared-001, Shared-002, Shared-003, Shared-004, Shared-005, Shared-006	The 1095-C for 1 or more workers has a date for covered individuals in Section III. However, you haven't listed coverage for the individuals in any of the months of the year.

Solution: Remove the date for covered individuals in Section III or add coverage in the 12 months boxes, using the *Import 1095-C Forms Recipients Data* EIB.
Related Information
Tasks

Prepare ACA Recipient Data for EIB Upload on page 1480
View and Correct ACA Data Transmission Status on page 1482

Medicare

Steps: Set Up Medicare Tracking

Context

You can track Medicare coverage and enrollment information for employees, retirees, terminated workers, and dependents. You can coordinate benefits based on Medicare coverage to determine the primary and secondary payer on medical expenses.

Steps

1. Create Custom Business Processes.

   Configure the *Manage Medicare Information* business process in the Benefits functional area.

   You can include the *Change Benefits for Life Event* subprocess to evaluate whether adding Medicare coverage affects existing benefit plans.
2. Edit Business Process Security Policies.

   You can configure the *Manage Medicare Information* business process on supervisory or retiree organizations.
3. Edit Domain Security Policies.

   Grant permission on these domains:

   - *Self-Service: Medicare* provides self-service users with access to the Medicare Information profile report on their worker profile. The report also has a link to view Medicare information for dependents.
   - *Person Data: Date of Death* displays the Date of Death field on the Manage Medicare Information task.
   - *Worker Data: Medicare - USA* secures the View Medicare Data and the Medicare Information for Profile reports.
4. Access the Maintain Event Categories and Reasons task.

   Create categories and reasons for tracking Medicare information.

   Security: *Set Up: Staffing* domain in the Staffing functional area.
5. (Optional) Access the Maintain Medicare Reporting Reasons task.

   Select the Self-Service check box for each reason to display on the Manage My Medicare Information task for employees and retirees.

   Security: *Set Up: Benefits* domain in the Benefits functional area.
6. (Optional) Steps: Set Up Profiles and Profile Groups.

   Add the Medicare Information report to the Benefits profile group on the worker profile.

Result

Employees and retirees can enter and manage their Medicare information by accessing:

- The Manage My Medicare Information task.
- Benefits > Change My Medicare Data from the related actions menu of their profile.

Administrators can enter and manage Medicare information for employees, retirees, terminated workers, and dependents by accessing:

- The Manage Medicare Information task.
- Benefits > Change Medicare Data from the person's related actions menu.
- The Change Medicare Part D EGWP Data task.

Manage Medicare Information

Prerequisites

Configure the *Manage Medicare Information* business process and security policy in the Benefits functional area.

Context

You can manage Medicare information in Workday so that you can incorporate Medicare coverage into benefits eligibility and changes to benefits enrollment.

Steps

1. Access the Manage Medicare Information task.

   You must have access on the *Person Data: Date of Death* domain to view the Date of Death field in the Personal Information section of the task.
2. Enter coverage dates and information in the Medicare Details section.

   When *Change Benefits* is a subprocess of the *Manage Medicare Information* business process, Workday uses the Event Date as the Benefit Event Date.

   You can't remove a section of Medicare data once it's submitted and approved. You can rescind or correct the *Manage Medicare Information* business process.

Result

You can view Medicare information on the:

- View Medicare History report.
- Recent Medicare History grid of the Manage Medicare Information task. The grid displays the last 5 Medicare events.

Dependents and Beneficiaries

Manage Personal Relationship Types

Prerequisites

Security: *Set Up: Contact and Personal Data* domain in the Contact Information functional area.

Context

Identify the type of relationships you want to make available when adding:

- Beneficiaries
- Dependents
- Emergency contacts
- Trusts

Examples:

- Daughter
- Spouse
- Step child
- Uncle

Note: Workday recommends that you disable linking between beneficiaries and dependents. If the employee makes changes to a linked relationship, the changes can override dependents or beneficiaries when the person has more than 1 role. You can disable linking in the Benefits section of the Edit Tenant Setup - HCM task. Example: A worker gets divorced and changes the emergency contact to their sister. With linking enabled for beneficiaries and dependents, the sister also replaces the spouse as a dependent even though the sister is ineligible as a dependent.

Steps

1. Access the Maintain Related Person Relationships task.
2. As you complete the task, consider:

Option	Description
Map Relationship to Workday	Select the appropriate Workday relationship to ensure that Workday recognizes the relationship name. If you leave this field blank, Workday assumes that the relationship name is a valid dependent, beneficiary, or emergency contact.
Restrict to Relationships	You can select more than 1 type of relationship. Workday uses this field to present only those relationship names as valid relationships in these tasks: • Add Dependent • Add Beneficiary • Maintain Insurance Coverage Targets • Maintain Health Care Coverage Targets
Restrict to Countries	Enables you to configure allowed relationships in a country. When you leave this field blank, Workday allows the selected relationship for all countries.
Include Relationship for Wellness	Enables you to add wellness information for this relationship type as a related action on the worker profile. Select Benefits > Change Wellness Data.
Usage Count	Includes any historical entries or references to the relationship type. You can't drill down into the usage count.

Next Steps

To see a list of all roles entered in Workday, use the Related Person Relationships report.

To see invalid relationships between a worker and a related person, such as a dependent, beneficiary, or emergency contact, see the Workers with Invalid Related Person Relationships report. When a relationship has an invalid value, the relationship is no longer allowed.

Related Information

Reference

Reference: Edit Tenant Setup - HCM

Manage Dependents and Beneficiaries

Prerequisites

- Set up the types of person relationships.
- Configure the *Dependent Event* and *Change Beneficiary* business processes and security policies in the Benefits functional area.
- Add localized information using the Edit Tenant Setup - Global task.
- Security:
  - *Self-Service Add Beneficiaries in Benefits Enrollment* domain in the Benefits functional area.
  - *Self-Service: Beneficiaries* domain in the Benefits functional area.
  - *Self-Service: Spousal Surcharge* domain in the Benefits functional area.
  - *Worker Data: Add Beneficiaries in Benefits Enrollment* domain in the Benefits functional area.
  - *Worker Data: Beneficiaries and Dependents* domain in the Benefits functional area.
  - *Worker Data: Spousal Surcharge* domain in the Benefits functional area.

Context

When adding a dependent or beneficiary, you can only select relationships where the Restrict to Relationship field on the Maintain Related Person Relationships task is:

- *Dependent*
- *Beneficiary*
- Blank

Workers might want to designate a legal trust as a beneficiary instead of individual persons. When adding beneficiaries, you can also add any beneficiary-related court orders.

You can inactivate, but not delete, a dependent or beneficiary if they've ever had a benefit plan enrollment. However, if they have a current enrollment or beneficiary designation, you must first remove them from the plan before you can inactivate them.

Workers can only view active dependents or beneficiaries. For Benefit Partners and Administrators, inactive dependents or beneficiaries display with (Inactive) appended to their name.

You can't reactivate dependents that have a date of death. For deceased dependents, you need to create a benefit event to remove any currently enrolled benefits.

If you hide dependent-related fields by country, Workday hides the fields in these areas:

- Adding or editing dependents, including open enrollment events: disability, full-time student status, and tobacco information.
- Enrollment events: tobacco-related enrollment instructions and the tobacco question for spouses and dependents
- Wellness data tasks - dependents: tobacco use information.

Steps

- Add a dependent.

  Select Benefits > View Dependents > Add from the related actions menu of the worker. As you complete this task, consider:

  - Select Use as Beneficiary to make the person available for designation as a beneficiary.
  - If you select spouse or domestic partner for Relationship, you must select Could Be Covered For Health Care Coverage Elsewhere if you want to add a benefit surcharge.
  - You can indicate whether the dependent uses tobacco for Tobacco Use.
  - You can select a dependent's verification status.

- Add a beneficiary:

  Select Benefits > View My Beneficiaries > Add from the related actions menu of the worker.

  If you:

  - Haven't selected the Disable Emergency Contact, Dependent, and Beneficiary Linking check box in the Edit Tenant Setup - HCM task, you can select Existing Dependent or Emergency Contact.
  - Selected the check box, you can only create new beneficiaries that aren't linked to other related persons.
- Inactivate a dependent or beneficiary:

  Select either Benefits > View Dependents or Benefits > View Beneficiaries from the related actions menu of the worker. Select Dependents > Inactivate or Beneficiary > Inactivate from the related actions menu of the dependent or beneficiary.
- Reactivate a dependent or beneficiary:

  Select either Benefits > View Dependents or Benefits > View Beneficiaries from the related actions menu of the worker. Select Dependents > Reactivate or Beneficiary > Reactivate from the related actions menu of the dependent or beneficiary.
- Delete a dependent or beneficiary:

  Select either Benefits > View Dependents > Delete or Benefits > View Beneficiaries > Delete from the related actions menu of the worker.

Next Steps

To add a Dependents link to the Personal Information worklet, use the Configure Worklet task.

You can also access these reports:

Report	Contents
Dependents Audit	Workers and their dependents by effective date, benefit group, last name range, or employee ID.
Dependents and Workers With Matching National IDs	Dependents with the same national ID as a worker by employee ID, last name range, or benefit group.
All Dependents With Same National ID	Dependents that share the same national ID.

Add or Delete Court-Ordered Benefits (QDRO)

Prerequisites

- Add and activate dependents and beneficiaries.
- Security: *Self-Service: Dependents* and *Worker Data: Dependents* in the Benefits functional area.
- Security: *Worker Data: Court Order Details* in the Benefits functional area to access the Court Orders section.

Context

You can enter 2 types of Qualified Domestic Relations Order (QDRO):

- Medical coverage for dependents
- Insurance coverage for beneficiaries

Steps

1. From the related actions menu of the worker, access either:
   - Benefits > View Dependents
   - Benefits > View Beneficiaries
2. Click Edit next to the dependent or beneficiary with the QDRO.
3. In the Court Orders section, complete:
   - Coverage Required
   - Start and End Date

Result

Adding a court-ordered benefit for a dependent creates a *Dependent Event*.

During a benefit change or open enrollment, Workday checks to see if the dependent:

- Has a court order.
- Is eligible for coverage.

Workday also verifies that the coverage begin date falls within the start and end date for the court order.

If these conditions are met, the employee must enroll the beneficiary or dependent in a benefit plan to complete the benefit enrollment process.

Next Steps

The Active Court Orders report displays employees with beneficiaries or dependents that have active court orders as of a specific date and for a specific benefit group. It also indicates whether the court order has been met.

Steps: Set Up Fair Market Value for Health Care Plans

Context

Under the Patient Protection and Affordable Care Act (ACA), dependents are eligible for health care coverage under their parent's plan, if:

- They're age 26 or under.
- Aren't full-time students.

States might want to tax this benefit.

Steps

1. Create an earning for the fair market value for the health care coverage.
   - For Workday Payroll, you must calculate the fair market value of dependent health care coverage.
   - For Payroll Interface, you must manage external payroll earnings.
2. Create Benefit Eligibility Rules on page 1255.
3. Steps: Set Up Passive Events on page 1441.
4. Create Health Care Plans on page 1289.
5. (Optional) For banded rates, enter the Fair Market Value per Dependent.

   See Create Health Care Rates on page 1269.
6. Steps: Set Up Enrollment Events and Rules on page 1341.

7. Access these tasks:
   - Open Enrollment
   - Change Benefits
   - Passive Events

Result

Dependents 26 years of age, or under, become eligible for health care coverage based on the eligibility rules and the health care plan setup.

Once enrollment is complete, this information is available to Workday Payroll and Payroll Interface.

Related Information
Tasks
Define Tax Authority Exceptions from Pay Component Groups
Manage External Payroll Earnings
Examples
Example: Calculate the Fair Market Value of Dependent Health Care Coverage (USA)

Assign a Verification Status to Dependents

Prerequisites

- Security:
  - *Self-Service: Dependent Verification* in the Benefits functional area to enable workers to view their dependent verification data.
  - *Worker Data: Dependent Verification* in the Benefits functional area.

Context

You can add an action step onto existing business processes to be notified of dependents needing review for verification when employees create new dependents or enroll their dependents into benefit plans.

Workday also enables you to assign verification statuses to existing dependents in bulk rather than 1 at a time.

Steps

1. Edit Business Process Security Policies.

   Select your desired roles from the Security Groups prompt of the *Verify Dependent Eligibility* action step for these business processes:
   - *Dependent Event*
   - *Change Benefits for Life Event*
   - *Change Benefits for Open Enrollment*

   The roles you assign to this action step determines who gets the task in My Tasks to assign dependents a verification status.
2. Access the Activate Pending Security Policy Changes task.

3. Edit Business Processes.

   Add the *Verify Dependent Eligibility* action after the initiation step as step *a1* for these business processes:

   - *Dependent Event*
   - *Change Benefits for Life Event*
   - *Change Benefits for Open Enrollment*

   (Optional) From the related actions menu of the new step, select Business Process > Set as Completion.

Result

For the *Dependent Event* business process, configured security groups will receive a task in My Tasks to review and assign a verification status to newly created dependents.

For the *Change Benefits for Life Event* and *Change Benefit for Open Enrollment* business processes, Workday applies the *Dependent Part of Benefit Package?* condition rule to the *Verify Dependent Eligibility* step. If this condition is true, the task in My Tasks includes both new and existing dependents when they're enrolled in an employee's benefit plans.

Next Steps

Create condition rules on the new action step that meet your specific needs. For example, you can create a condition rule so that the step only activates when a new dependent is added to an employee's benefit plans.

Access the Manage Dependent Verification Status task to update the verification status of existing dependents in bulk.

Related Information
Tasks
Manage Dependents and Beneficiaries on page 1500
2023R2 What's New Post: Dependent Verification
2023R2 What's New Post: Enable Dependent Verification in Business Processes

Purge Dependents and Beneficiaries for Active Workers

Prerequisites

- Create a custom purge report that returns active workers whose dependents and beneficiaries you want to purge. Add the *Purge* tag to the custom report.
- Open a service ticket with Workday Support requesting to enable the Workers Dependent and Beneficiary purgeable data type and include a list of purge instances from your custom report.
- Security: These domains in the System functional area:
  - *Custom Report Creation*
  - *Purge Person Data*

Context

You can purge all dependents and beneficiaries for a selected set of active workers. When you purge this data, Workday removes any references to the person from the tenant.

Note: This feature is available only by request, as purging this data is irreversible and can cause issues if done incorrectly. Always test the custom report and purge in your Sandbox environment before you purge any data in your Production environment.

To avoid affecting payroll, integrations, and reporting, we recommend that you don't purge dependents or beneficiaries that are active in current elections. Additionally, we recommend that you don't purge emergency contact and dependents and beneficiaries data at the same time. Purge emergency contact data first and then purge dependents and beneficiaries data afterwards.

Steps

1. (Optional) Create a purge plan.

   See ../../../authentication-and-security/data-privacy/data-purging/lub1590696272749.dita.

   Select *Worker* as the object to purge. We also recommend selecting All Active and Terminated Workers as the report data source.

   If you don’t create a purge plan, Workday will automatically select required purgeable data types to purge.
2. Access the Purge Person Data task.

   Select the custom purge report that you created. See ../../../authentication-and-security/data-privacy/data-purging/eoh1591731211014.dita.
3. From the Population to Purge (Report Definition) prompt, select the custom purge report for dependents and beneficiaries.

   Only reports with the *Purge* tag display.
4. Click View report on selected population to confirm the data to purge.
5. Select the check box for the Workers Dependent and Beneficiary purgeable data type and click OK.
6. Select the Confirm check box and click OK.

Result

Workday:

- Purges the dependents and beneficiaries data that matches your purge criteria. Run the report again to confirm the purge action.
- Removes all the dependents and beneficiaries data for active workers that match your criteria in the custom purge report.

  Note: When using the Workers Dependents and Beneficiaries purgeable data type, Workday will not purge data shared with an emergency contact.

Related Information
Concepts
Setup Considerations: Data Purging
Tasks
2025R1 Release Note: Purge Dependents and Beneficiaries for Active Workers
Reference
Reference: Purgeable Data Types

Talent

Goals

Setup Considerations: Organization Goals

You can use this topic to help make decisions when planning your configuration and use of organization goals. 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

Organization goals apply to a supervisory organization and to all workers in it. In contrast, individual goals apply to just 1 employee. Organization goals don't apply to subordinate supervisory organizations, but goals can be linked throughout the supervisory organization hierarchy.

Business Benefits

You can align organizational and individual goals, enabling workers to accomplish their initiatives and yours.

Use Cases

Managers can consistently align individual goals to an organization goal.

Workers and managers can:

- Align individual goals with organization goals.
- View goals aligned to their supervisory organization.
- View how individual and organization goals are aligned using the Navigate Goal report.
- Track overall progress against an organization goal with automatically calculated completion percentages.

Questions to Consider

Questions	Considerations
How do you want managers to link their organization goals to other organization goals in the organization hierarchy?	You can enable managers to link organization goals to just the immediate parent organization, or up through the whole organization hierarchy. You can also prevent linking organization goals by default.
Do you want to align individual goals in performance reviews to organization goals?	You can align individual goals to organization goals and then pull the individual goals into performance reviews. Or, managers and employees can link individual goals to organization goals during the *Set Content* step in performance reviews.
Who do you want to view organization goals?	You can create private organization goals so that only members of the supervisory organization hierarchy can see them. You can also configure organization goals so they're private by default.
How do you want to calculate goal completion?	You can manually calculate the completion percentage of an organization goal, or you can have Workday automatically calculate the percentage.

Questions	Considerations
How does Workday factor individual goal weight into the calculated completion percentage of organization goals?	Workday doesn't include individual employee goal weight when calculating the completion percentage of the organization goal. Map percentages to your goal completion statuses to enable calculation of completion percentages.
How do organization goals align with the company's fiscal year?	You can define specific timeframes in which an organization goal applies.

Recommendations

- Archive outdated organization goals to improve performance when running goal reports.
- Create alignment in your organization hierarchy by selecting an organization goal in the Organization Alignment field of the Add Goal to Employees task when cascading goals.
- Check organization goal progress on a quarterly basis to ensure you're on track to meet the goal.
- Allow organization alignment through the organization hierarchy when you set up your goals to avoid having to create an organization goal for every level of your supervisory organization. Employees can align their individual goal directly to an organization goal that is a few levels above.
- Allow automatic calculation of percent complete to have Workday automatically calculate the organization goal progress based on the statuses of aligned employee goals.

Limitations

- You can align an employee goal to only 1 organization goal at a time.
- The organization goals in the View Goals for Worker worklet only displays organization goals for the current goal period. To replace this task, you can create a custom report using the Configure Profile Group task.
- You can't hide the Supporting Initiatives field in an organization goal.
- You can only sort organization goals in alphabetical order by supervisory organization. You can't sort them by organization hierarchy. Example: You can only sort from the lowest supervisory organization to the highest supervisory organization in a hierarchy.
- Private organization goals restrict who is able to view and align to that organization goal.
- Workers with multiple jobs or positions can only align to goals of the primary position.
- Workday doesn't support organization goals for organization types outside of supervisory organizations.
- Workday doesn't support hiding or requiring fields for organization goals.

Tenant Setup

No impact.

Security

Configure these domains in the Performance Enablement functional area.

Domain	Considerations
Set Up: Goals	Set up this domain to support all goals, including both employee and organization goals.
Self-Service: Organization Goals	Workers secured to this domain can view organization goals.

Domain	Considerations
Worker Data: Organization Goals	Use this domain to manage and view organization goals. Administrators can restrict access using modify permissions to specific roles.
Performance and Goals: Contingent Worker Eligibility	Workers secured to this domain can participate in goals and to link their goals to organization goals.

Business Processes

No impact.

Reporting

Reports	Considerations
View Organization Goals	Use to view organization goals for 1 supervisory organization.
View Goals for Worker	Use the Organization Goals tab on this report to view all organization goals that apply to a worker in the current goal period. The Individual Goals tab also shows how individual goals are aligned to organization goals.
View Goal Alignment	Use to view the percent completion of an organization goal and a list of all workers that have individual goals aligned to an organization goal.

Integrations

Workday provides these web services for organization goals secured to the *Worker Data: Organization Goals* domain:

Web Services	Considerations
Get Organization Goals	Retrieve active and archived organization goals from your tenant.
Put Organization Goal	Upload active and archived organization goals to your tenant.

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.

Related Information

Tasks

Steps: Manage Organization Goals on page 1515

Create or Edit Organization Goals on page 1516

Reference

The Next Level: Overview of Primary Position Designation Impact

Steps: Set Up Goals

Prerequisites

Security:

- *Set Up: Goals* domain in the Performance Enablement functional area.
- *Set Up: Tenant Setup - HCM* domain in the System functional area.
- *Set Up: Talent* domain in the Talent Pipeline functional area.
- *Performance and Goals: Contingent Worker Eligibility* domain in the Performance Enablement functional area to enable goals for contingent workers.

Context

You can use these types of goals in Workday:

Type	Description
Organization Goals	Goals assigned to supervisory organizations.
Individual Goals	Goals assigned to individual employees.
Cascaded Goals	Same goal assigned to 2 or more employees by an administrator or manager. Once a goal is cascaded, it becomes an individual goal for each employee.
Review Goals	Individual goals that are part of employee reviews.

Steps

1. (Optional) Access the Configure Profile Group task to update *Performance for Worker Profile* profile group.

   Select the Goals report to display goals in the card format on the Performance tab of the Worker Profile.
2. Access the Maintain Goal Setup task to set up options for individual goals, including hiding or requiring fields for all users, or for specific security groups.
3. Set Up Individual Goals on page 1510.
   - Add workers to the *Self Service: Employee Goals* domain so they can view their goals on the My Goals report.
   - Add workers to the *Worker Data: Employee Goals* domain so they can view goals for other workers on the View Goals for Worker report.
4. Set Up Goals for Employee Reviews on page 1511.
5. Set Up Organization Goals on page 1512.
   - Add workers to the *Self-Service: Organization Goals* domain so they can view their organization goals on the My Goals report.
   - Add workers to the *Worker Data: Organization Goals* domain so they can view organization goals for other workers on the View Goals for Worker report.
6. Set Up Goal Completion Statuses on page 1514.
7. Configure additional goal settings with these tasks accessible from the Maintain Goal Setup page:

Option	Description
Maintain Goal Units	Click to create or change unit types to track goal target, actual, minimum, and maximum values.

Option	Description
Maintain Goal Payout Bands	Click to create goal payout bands for the Net Attainment options when configuring the Goals section on the Configure Employee Review Template task.
Configure Talent Tags	Click to add the ability to link goals to competencies, development items, feedback, or flex teams using the Relates To field.
Maintain Goal Categories	Click to create or change goal categories. Categories simplify goal management and reporting. You can assign categories to individual goals, cascaded goals, and review goals.
Maintain Goal Periods	Click to define date ranges to associate with organization goals.

8. Configure goal templates.

   See Steps: Configure Goal Templates on page 1514.
9. Enable activity stream for the *Goal* and *Organization Goal* objects.

   See Steps: Enable Activity Stream.

Next Steps

- Access the View Goal Setup report to view details about the goal setup in your tenant.
- Create or Edit Organization Goals.
- Create or Edit Individual Goals.

Related Information

Tasks

Create Goal Payout Bands for Net Attainment on page 1650

23R2 What's New Post: Goals User Experience Redesign

23R2 What's New Post: Hide or Require Optional Fields for Goals

Reference

The Next Level: Preparing for Goals User Experience Redesign

2024R2 Release Note: Goals User Experience Redesign for Mobile

Set Up Individual Goals

Prerequisites

Context

You can configure which options are available when you create, edit, view or archive individual and cascaded goals. You can hide or require fields for either:

- All workers.
- Workers in specific security groups.

Steps

1. Edit Business Process Security Policies.

   Set up initiating actions on the *Manage Goals* business process security policy to control what operations workers and managers can perform for goals.
2. Access the Maintain Goal Setup task.

   In the Configure Individual Goals section, add a row for each field you want to hide or require for individual goals.

   As you complete the grid, consider:

Option	Description
Field	Don't add optional fields to the grid. Workday enables all individual goal fields as viewable and optional for all workers by default.
Criteria	Workday doesn't display the *Require for All* option for all fields. When you select *Security Group*, specify the groups you want the field hidden from or required for.
Enforce Required in Web Service	(Optional) If you: • Require the goal field and select the check box, Workday sends a validation message in the web service when you don't include the goal field. • Require the goal field but don't select the check box, Workday doesn't send a validation message when you don't include the field in the web service.

   Security: These domains in the Performance Enablement functional area:

   - *Self Service: Employee Goals*
   - *Worker Data: Employee Goals*

Related Information

Concepts

Concept: Hide and Require Goal Fields by Security Group on page 1525

Tasks

Set Up Organization Goals on page 1512

Set Up Goal Completion Statuses on page 1514

Hide or Require Optional Fields

2032R2 WN Post: Hide or Require Optional Fields for Goals

The Next Level: Preparing for Goals User Experience Redesign

Reference

2024R2 Release Note: Goals User Experience Redesign Multi-Management of Goals

Set Up Goals for Employee Reviews

Prerequisites

Security: *Set Up: Goals* and *Set Up: Employee Reviews* domains in the Performance Enablement functional area.

Context

You can set up options to control how workers create and update goals in employee reviews.

Steps

1. Access the Maintain Goal Setup task.
2. As you complete the options in the Configure Goals in Reviews section, consider:

Option	Description
Lock Goals Associated with In Progress Reviews	Select to prevent workers from editing individual goals included in employee reviews that are in progress.
Allow Deletion of Goals Associated with Reviews	Select to allow workers to delete goals included in completed or in progress employee reviews. If you also select Lock Goals Associated with In Progress Reviews, workers can only delete goals in completed reviews.
Allow Ordering of Goals in Reviews	Select to allow workers to change the order of goals in employee reviews at these steps: • *Set Review Content* • *Complete Self Evaluation* • *Complete Manager Evaluation* • *Update Manager Ratings* The goal order only applies to employee reviews and doesn't apply to goals displayed in the My Goals report and other goals reports.

Next Steps

Configure the Goals section of the employee review template.

Related Information
Tasks
Configure the Goals Section on page 1632

Set Up Organization Goals

Prerequisites

Security:

- *Self-Service: Organization Goals* domain in the Performance Enablement functional area.
- *Worker Data: Organization Goals* domain in the Performance Enablement functional area.

Context

You can configure which options are available when users create or edit organization goals. You can also link organization goals to other organization goals higher in the organization hierarchy.

You can enable aligning organization goals to other organization goals, and you can also enable workers to align individual goals to organization goals.

You can enable Workday to calculate the completion percentage of an organization goal, or you can track the completion percentage manually. When you configure Workday to calculate the completion percentage of organization goals automatically:

- Individual goal statuses pending approval aren't counted in the calculation.
- Individual goals without a status count as zero.

Steps

1. Access the Maintain Goal Setup task.
2. To enable workers to align individual goals to organization goals, you can include the Organization Alignment field in individual goals. If you don't specify the Organization Alignment field criteria in the Configure Individual Goals grid, Workday displays the field in all goals and is optional for workers to complete. See Set Up Individual Goals.
    - From the Field prompt, select Organization Alignment .
    - From the Criteria prompt, select *Require For All*, or select security groups to require or hide the Organization Alignment field in individual goals.
3. As you complete the task under the Configure Organization Goals section, consider:

Option	Description
Show Organization Goal Description Field	Select to display descriptions for organization goals. You can hide the description for organization goals by unselecting the check box.
Organization Alignment	Select to enable organization goals and to link to goals 1 level up in the organization.
Organization Goal Allows Organization Alignment Through Hierarchy	Select along with the Organization Alignment check box to link to goals up the entire organization hierarchy.
Default Organization Goal to Private	Select to make organization goals private by default when you create them.
Enable Percent Complete	Select to enable only manual entry of the completion percentage.
Allow Automatic Calculation of Percent Complete	Select along with the Organization Alignment and Enable Percent Complete check boxes to have Workday calculate the completion percentage. You can't hide the status field under the Configure Individual Goals section.

Result

Workday displays the enabled organization goal options on the Manage Organization Goals task.

Next Steps

Create or edit organization goals.

Related Information

Tasks

Create or Edit Organization Goals on page 1516

Reference

2024R2 Release Note: Organizational Goals Configuration

Set Up Goal Completion Statuses

Prerequisites

Security: *Set Up: Goals* domain in the Performance Enablement functional area.

Context

You can create statuses to evaluate how employees have progressed in their goals. Each status determines what items are eligible to move from 1 review to the next.

Workday recommends you map your goal statuses to percent complete values if you enable Workday to automatically calculate the completion percentage of organization goals. Otherwise, the percent complete will always be 0.

Steps

1. Access the Maintain Goal Completion Statuses task.
2. Select a value in the Map to Workday Status field if you want to move content from 1 employee review to another.

   This field is used with the Load Content from Previous Review and Load Relevant Goals fields in the Goals section on the Configure Employee Review Template task.

Next Steps

Access the Goal Completion Statuses report to view a list of all statuses. Use the employee review document to associate a status with a goal.

Limit the number of active goal completion statuses to 11 to display goals on the Track My Team's Goals worklet on the Team Performance dashboard and the Track My Goals worklet on the Talent and Performance dashboard.

Related Information

Tasks

Steps: Set Up Development Plans on page 1692

Steps: Set Up Disciplinary Actions on page 1695

Steps: Set Up Performance Improvement Plans on page 1699

Steps: Set Up Performance Reviews on page 1679

Steps: Configure Goal Templates

Prerequisites

Security: *Set Up: Goals* domain in the Performance Enablement functional area.

Context

You can customize how Workday displays individual goals in the My Goals and View Goals for Worker tasks by creating goal rules and configuring a goal template:

- Goal rules define criteria for organizing goals, such as goal status, category, or due date.
- The goal template filters goals into sections according to the goal rules.

Workday provides a default template, Ad-Hoc Goal Template that displays all individual goals in 1 section. You can:

- Add sections.
- Provide your own section names, including a Default Goal Section Name for goals that don't meet any of the rules defined.
- Associate a unique rule with each section.

If a goal meets more than 1 rule, it can be in multiple sections. Set up your template rules so that each goal only meets 1 rule to prevent employee confusion when Workday displays the same goal in multiple sections.

Goals that don't match any of your rules are displayed in the default section. Workday hides the default section when empty, but the other sections are always visible.

The template applies to all individual goals and you can update your configuration at any time.

Changes you make to your goal template immediately impact employees.

Steps

1. Access the Create Goal Template Rule task.

   Create Rule Conditions to display goals in sections.

   Example: If you want to organize goals by status, create a rule for each goal completion status in your tenant. You can combine multiple conditions in 1 rule.

   Note: Report fields for the Goal *business object* exclude values from in-progress employee reviews. These fields only return values from completed employee reviews and in-progress or completed Manage Goal events.

   Setting up goal template rules can also impact how you can mass archive individual goals.
2. Access the Configure Goal Template task.

   Set up the goal template to define each section on a separate row.

   Example: Create sections named Not Started, In Progress, and Completed to match the goal status rules.

Result

Workday displays goals in these reports:

- My Goals and View Goals for Worker reports.
- View Goals for Worker report on worker profiles.

Next Steps

- Create goals for an individual employee.
- To update or delete goal rules, use the Edit Goal Template Rule and Delete Goal Template Rule tasks.

Related Information
Tasks
Create Business Process Condition Rules

Steps: Manage Organization Goals

Prerequisites

Security: *Worker Data: Organization Goals* domain in the Performance Enablement functional area.

Context

You can create goals for supervisory organizations and align them with other supervisory organization goals 1 or more levels up in the hierarchy. You can then link individual goals to organization goals during the employee review process.

If you want to rename labels for goals, use the Maintain Custom Labels task.

Steps

1. Access the Maintain Goal Periods task to define date ranges to associate with organization goals.

   Security: *Set Up: Goals* domain in the Performance Enablement functional area.
2. Create or Edit Organization Goals on page 1516.
3. (Optional) Access the Copy Goal to Organization Goal task.

   Copy a goal to an organization goal. You can copy any type of goal to an organization goal and change it to suit your organization.
4. (Optional) Access the Copy Organization Goals task to copy a goal from 1 period to another.

   Select the Private check box to restrict visibility of this goal to members of the organization chain.
5. Link an individual goal to an organization goal:

   - In the Goals report on worker profiles.
   - In the My Goals and View Goals for Worker tasks.
   - When cascading goals with the Add Goal to Employees task, select an organization goal the individual goal supports.
   - In the *Set Review Content*, *Self Evaluation*, and *Manager Evaluation* phase during the employee review process.

Next Steps

View and track organization goals:

- Select Talent > View Organization Goals as a related action on a supervisory organization.
- Click Goals on organization profiles. If you enabled activity streams in the Edit Tenant Setup - System task, you can see comments from other users when you view each goal.

Workday also provides several standard reports to track goals. For a list, access Workday Standard Reports and select the *Goals and Reviews* and *Organization Goals* categories.
Related Information
Concepts

Concept: Employee Reviews on page 1652

Tasks

Enable Archiving Goals on page 1523

Create Custom Labels

Steps: Enable Activity Stream

Create or Edit Organization Goals

Prerequisites

- Set up default organization goal options using the Maintain Goal Setup task.
- Create goal periods with the Maintain Goal Periods task.

Security: *Worker Data: Organization Goals* domain in the Performance Enablement functional area.

Context

Create and maintain goals for supervisory organizations. You can:

- Link goals to goals that are 1 or more levels up in the organization hierarchy.
- View or manually enter a percent complete.
- Associate them with supporting business initiatives.

  Initiatives is only available as field if you have the Projects product.

Steps

1. Access the Manage Organization Goals task.
2. Select an Organization and Goal Period.
3. Create a new goal or change an existing organization goal.
4. As you complete the task, consider:

Option	Description
Percent Complete	Enter the completion percentage of the organization goal manually. Available if you select the Enable Percent Complete check box on the Maintain Goal Setup task.
Organization Alignment	Link this organization goal to goals that are 1 or more levels up in the organization hierarchy. To delete a link to another organization goal, clear this field. Available if you select the Organization Alignment check box on the Maintain Goal Setup task.
Supporting Initiatives	Select initiatives that aren't already associated with an organization goal.
Private	Only members of the organization chain can see the goal. Goals that have Supporting Initiatives can't be private. Automatically selected if you selected the Default Organization Goal to Private check box on the Maintain Goal Setup task.
Calculated	Enable Workday to calculate the completion percentage of the organization goal. If you check this field, the Percent Complete field becomes noneditable. Available if you select these check boxes on the Maintain Goal Setup task: • Organization Alignment • Enable Percent Complete • Allow Automatic Calculation of Percent Complete

Next Steps

- Associate an individual goal with an organization goal.

  Once you associate an organization goal with an individual goal, you can't delete an organization goal even if you delete the individual goal or remove the association.
- Use the View Goal Alignment task to view organization goal alignment with other goals in the same supervisory organization hierarchy. You can also drill down to see which workers and their respective individual goals align with the organization goal.

Related Information

Tasks

Steps: Set Up Initiatives

Reference

https://community.workday.com/articles/399192

Create or Edit Individual Goals

Prerequisites

Configure the *Manage Goals* business process and security policy in the Performance Enablement functional area. See Steps: Configure Business Process Definitions.

Context

Create, edit, or delete individual goals for yourself or another employee on the Workday desktop or mobile app. You can delete individual goals when they're:

- Not part of in-progress or completed employee reviews.
- Marked as Editable when cascaded to employees.

To prevent editing of goals that are part of in-progress reviews, select Lock Goals Associated with In Progress Reviews on the Maintain Goal Setup task. Regardless of this setting, you can edit goals within employee reviews.

Goals that are in *Needs revising* state that you pull into a review will have the *Needs revising* status removed when the review is completed, but the original approval will still display in My Tasks of the approver.

Steps

1. Access the appropriate task or report:
    - View Goals for Worker
    - My Goals
2. Click Create Goal to create a new goal.
3. Add goals for any section, regardless of the section rule. Workday moves a goal to the appropriate section after it's approved. Access the appropriate task:
    - Edit Goal on the card of the goal that you want to update.
    - Click Manage Goals to update multiple goals.

    For users with access to the *Individual Goals* and *Archive Goals* initiating actions on the Manage Goals business process security policy, we provide a Bulk Update button.
4. As you edit the fields in the Goal Details tab consider:

Option	Description
Goal	Enter the Goal name.
Description	Available if you enable the Description field to be optional or required on the Maintain Goal Setup task.
Status	Available if you: • Set up goal completion statuses. • Enable the Status field as optional or required on the Maintain Goal Setup task. Goal statuses determine which goals are eligible to move from 1 employee review to the next.
Category	Available if you:

Option	Description
	• Create goal categories. • Enable the Category field as optional or required on the Maintain Goal Setup task.
Organization Alignment	Available if you: • Configure the *Self-Service: Organization Goals* and *Worker Data: Organization Goals* domains. • Enable the Organization Alignment field as optional or required on the Maintain Goal Setup task. Link this individual goal to any public organization goal, or to a private goal in your own supervisory organization.
Due Date	Available if you enable the Due Date field to be optional or required on the Maintain Goal Setup task.

5. As you edit the fields in the Additional Details tab consider:

Option	Description
Relates To	Available if you configure at least 1 talent tag (competency, development item, feedback, or flex team) for goals on the Configure Talent Tags task.
Weight	Available if you don't hide the Weight field on the Maintain Goal Setup task.
Associated Reviews	Displays reviews associated with the goal. Available if you don't hide the Associated Reviews field on the Maintain Goal Setup task.
Track By	Used to track goal progress where there are quantitative methods to measure whether a goal is achieved. Available if you don't hide any of these fields on the Maintain Goal Setup task. • Target • Actual • Minimum • Maximum

6. Click the Milestones tab (available if you don't hide the Milestones field on the Maintain Goal Setup task).
   - Click the + sign on the grid to add a Milestone row to the grid.
   - Enter information in the Milestone field and complete the Due Date and Status fields.
7. Click the History tab to view the history of the goal.
8. Click Submit to submit the goal changes or click Save for Later.

9. (Optional) To delete an approved goal, click the ellipses on the bottom right of a goal card and click Delete Goal.

   Once deleted, you can't recover a goal.

   After submission, Workday displays deleted goals in red strike-through font until approval, and they then disappear.

Result

After you submit goals, if an approval step is configured in the business process, workers can't edit the goals until the first change is approved.

Related Information

Concepts

Concept: Employee Goals in Employee Reviews on page 1672

Tasks

Set Up Goal Completion Statuses on page 1514

Set Up Individual Goals on page 1510

Set Up Goals for Employee Reviews on page 1511

Reference

The Next Level: Preparing for Goals User Experience Redesign

2023R2 What's New Post: Goals User Experience Redesign

2024R2 Release Note: Goals User Experience Redesign Multi-Management of Goals

Cascade Goal to Employees

Prerequisites

- Configure the *Cascade Goals* business process and security policy in the Performance Enablement functional area. See Steps: Configure Business Process Definitions.
- (Contingent workers only) Add workers to the *Performance and Goals: Contingent Worker Eligibility* domain in the Performance Enablement functional area.

Context

You can assign the same individual goal to a group of employees by cascading a goal. The cascaded goal for each employee is independent of copies of the same cascaded goal for other employees. You can prevent editing so recipients can't change the goal details.

You can cascade a goal to:

- Employees and contingent workers.
- Supervisory or custom organizations, including subordinates.
- Talent pool.

You can cascade public or private organization goals, or an individual goal that supports an organization goal. Goals that support a private organization goal can only be cascaded to employees in the same organization hierarchy. Example: If an employee has multiple positions, you can only cascade private organization goals for the primary position's supervisory organization.

You can also create filtering rules on a talent pool, and cascade goals to that talent pool.

If you want to assign a single previously cascaded goal to additional employees, use the Add Additional Employees to Goal task. Goals that you choose to be cascaded, regardless of whether they're organization or individual goals, all become individual goals after you complete the Add Goal to Employees or Add Additional Employees to Goal tasks.

Steps

1. (Optional) Determine if your event is large enough that you need to work with the Workday Production Readiness Team. See Workday Community: Production Readiness: Large Volume Events Best Practices for guidelines about opening a Production Readiness case.
2. Access the Add Goal to Employees task.
3. Use an Assign To list to select which employees will receive the goal:
    - Employees.
    - Talent Pool.
    - Organizations, with the option to include subordinate organizations.
4. As you complete the task, consider:

Option	Description
Goal	Limit the title length for best display.
Category	Available if you: • Create goal categories. • Enable the Category field as optional or required on the Maintain Goal Setup task.
Description	Available if you enable the Description field as optional or required on the Maintain Goal Setup task.
Organization Alignment	Available if you enable: • The *Self-Service: Organization Goals* and *Worker Data: Organization Goals* domains. • The Organization Alignment field as optional or required on the Maintain Goal Setup task. Link this individual goal to any public organization goal or to a private goal in your own organization.
Minimum / Maximum	Available if you enable the Minimum or Maximum fields as optional on the Maintain Goal Setup task. If you select a Track By option, Workday displays editable fields for tracking goals. Example: If you select Amount from the Track By field, Workday displays the Minimum Amount and Maximum Amount fields.
Weight	Available if you enable the Weight field as optional on the Maintain Goal Setup task. Indicate the goal priority using any weighting scale.
Due Date	Available if you enable the Due Date field as optional or required on the Maintain Goal Setup task.

Option	Description
Editable	Enables recipients to change their assign goal details after the goal has been cascaded. Regardless of this setting, you can change the Weight and Status of goals in employee reviews.

Example
If you create 2 goals in this task and assign them to 5 employees, Workday initiates 1 *Cascade Goals* business process. The *Cascade Goals* business process in turn initiates 5 *Manage Goals* subprocesses, 1 for each employee. Each *Manage Goals* subprocess includes 2 goals.

Next Steps

- You can select any combination of employees, talent pool, and organizations to receive a goal using the Add Additional Employees to Goal task.
- You can use the Correct related action to edit the instance of the *Cascade Goals* business process after saving your work. This only applies to cascaded goals that weren't marked as Editable.
- You can rescind the business process and start over to change a cascaded goal that isn't marked as Editable.

Related Information
Concepts
Concept: Best Practices for All Large-Scale Events
Tasks
Create or Edit Individual Goals on page 1518
Reference
Reference: Event-Specific Best Practices
The Next Level: Overview of Primary Position Designation Impact

Add Additional Employees to Goal

Prerequisites

- Create a goal and cascade it to more than 1 employee.
- Configure the *Cascade Goals* business process and security policy in the Performance Enablement functional area. See Steps: Configure Business Process Definitions.

Context

You can redistribute a single, previously cascaded goal to another group of employees without changing the goal.

If you want to edit the goal first or assign more than 1 previously cascaded goal, use the Add Goal to Employees task instead.

Steps

1. Access the Add Additional Employees to Goal task.
2. Select any combination of employees, talent pool, and organizations to receive the goal.

   To view a list of employees who have already received the goal, click the Assigned To number.

Result

Workday initiates a *Cascade Goals* business process that includes 1 *Manage Goals* business subprocess for each employee you want the goal distributed to.

Related Information

Tasks

Create or Edit Individual Goals on page 1518

Enable Archiving Goals

Prerequisites

- Configure the *Manage Goals* business process and security policy in the Performance Enablement functional area. See Steps: Configure Business Process Definitions.
- Understand how to set up goal template rules.

Context

You can archive historical individual or organization goals, minimizing clutter in the user interface and improving goal management.

You can:

- Archive goals and restore previously archived goals for yourself and employees in your organization.
- Archive an individual goal using the Archive Goal related action on a goal card.
- Archive individual goals for a specified worker using the Archive Goals task.
- Archive organizational goals using the Archive Organizational Goals task.
- Mass archive individual goals based on a goal template rule (administrators) using the Mass Archive Goals task.

Archiving a goal removes it from:

- Reports.
- Tasks.
- Employee review template configuration settings.
- Prompts.

You can't archive or restore goals that are:

- Awaiting approval.
- Part of in-progress employee reviews, including goals that are saved for later.
- Part of other in-progress events.

Steps

1. To enable workers self-service access to archive individual goals, add them to the *Self-Service: Employee Goals* domain in the Performance Enablement functional area.
2. To enable workers to archive organization goals, add them to the *Worker Data: Organization Goals* domain in the Performance Enablement functional area.
3. To enable administrators to mass archive individual goals, add them to the *Set Up: Goals* domain in the Performance Enablement functional area.

Result

Workers in the assigned domains can archive goals.

Next Steps

- To mass archive individual goals, use the Mass Archive Goals task. See Mass Archive Individual Goals on page 1524.
- To report on archived goals, create a custom report with the Archived Goals by Organization report data source.
- Use the Configure Profile Group task to add the Archived Goals report to the Performance tab of the worker profile.

Mass Archive Individual Goals

Prerequisites

Security: *Set Up: Goals* domain in the Performance Enablement functional area.

- Configure the *Manage Goals* business process and security policy in the Performance Enablement functional area. See Steps: Configure Business Process Definitions.
- Understand how to set up goal template rules.

Context

You can mass archive all individual goals meeting a template rule in 1 operation. You can't archive goals for terminated workers, and the same restrictions for archiving goals also apply to mass archiving goals. Workday skips these goals during the mass archive operation and leaves them unarchived:

- Goals saved for later and not yet submitted.
- Goals that are part of an in-progress event. Examples: Goals included in-progress events using the *Manage Goals* business process, or goals included in in-progress employee reviews.

  To include the goals in the archive, complete or cancel the in-progress event.

Workday recommends you conduct advanced preparation and testing before starting the mass archive operation. For more information, see. Reference: Event-Specific Best Practices.

Steps

1. Access the Mass Archive Goals task.
2. Select one of these options:
   - Run Now.
   - Run Once in the Future.
3. Select an Organization and optionally select whether to include subordinate organizations.
4. Select a Goal Template Rule.
5. To run the task in the future:
   a) Define the Schedule priority.
   b) Set the Start Date, Start Time, and Time Zone for when to launch the mass archive action.

Result

Workday launches the process for mass archiving the individual goals. The task runs as a background process that automatically completes the *Manage Goals* business process, skipping all other steps.

Next Steps

To view the status of the mass archive process, access the Process Monitor report.

Related Information

Tasks

Steps: Configure Goal Templates on page 1514

Concept: Hide and Require Goal Fields by Security Group

Using the Maintain Goal Setup task, you can hide or require individual goal fields for workers in specific security groups.

- Security groups that you select from the *Required For* prompt inherit from the initiating actions of your *Manage Goal Business Process* security policy.
- Security groups that you select from the *Hidden For* prompt inherit from the initiating actions and View All section of your *Manage Goal Business Process* security policy.

  When a user such as a manager reviews goals for another individual, the goal fields that display on the task derive from the security group configuration of the reviewer.

When you specify a goal as *Hidden For* or *Required For* for workers in multiple security groups:

- For a field to be hidden for a worker, all the security groups the worker belongs to on the *Manage Goals Business Process* security policy must be specified in the *Hidden For* column.
- For a field to be required for a worker, the worker only needs to be in at least 1 of the specified security groups listed in the *Required For* column.
- If there are security groups specified under both *Hidden For* and *Required For*, and a worker belongs to security groups under both columns, the security group specified under *Required For* takes precedence.

Reference: Individual Goal Fields

This table describes the individual goal fields that you can hide or require for all workers, or hide or require for specific security groups using the Maintain Goal Setup task. If you don't specify a field to be hidden or required, Workday displays the field as optional to all workers.

Field	Description	Criteria Options
Actual	Select to track the goal Actual Amount , Actual Percent, or Actual Number of Units in the Track By field.	• *Hide for All* • *Security Group*
Associated Reviews	Select to display in-progress and completed reviews associated with the individual goal.	• *Hide for All* • *Security Group*
Category	Select to assign a category in individual goals. Create goal categories for this field using the Maintain Goal Categories task.	• *Hide for All* • *Require For All* • *Security Group*
Completed On	Select to set a completion date in individual goals when the goal status is completed.	• *Hide for All* • *Require For All* • *Security Group*
Description	Select to include a description for individual goals.	• *Hide for All* • *Require For All* • *Security Group*
Due Date	Select to set a due date in individual goals.	• *Hide for All* • *Require For All*

Field	Description	Criteria Options
		• *Security Group*
Maximum	Select to track the goal Maximum Amount, Maximum Percent, or Maximum Number of Units in the Track By field.	• *Hide for All* • *Security Group*
Milestone	Select to include milestones in individual goals. A due date and status can be defined for each milestone.	• *Hide for All* • *Security Group*
Minimum	Select to track the goal Minimum Amount, Minimum Percent, or Minimum Number of Units in the Track By field.	• *Hide for All* • *Security Group*
Organization Alignment	Select to associate the individual goal to an organization goal 1 level up in the organization hierarchy.	• *Hide for All* • *Require For All* • *Security Group*
Status	Select to include a goal status in individual goals. Create goal statuses using the Maintain Goal Completion Statuses task.	• *Hide for All* • *Require For All* • *Security Group*
Target	Select to track the goal Target Amount, Target Percent, or Target Number of Units in the Track By field.	• *Hide for All* • *Security Group*
Weight	Select to assign a weight to individual goals, which are also used in employee reviews. The weight must be a whole number greater than or equal to 0.	• *Hide for All* • *Security Group*

Example: Hide the Track By Field in Individual Goals

This example illustrates how to hide the Track By field in individual goal fields.

Context

When setting up individual goals, you want to hide the Track By field so workers can't enter goal units to track their progress. To hide the Track By field, you must hide all 4 options that use the field.

Steps

1. Access the Maintain Goal Setup task.
2. In the Configure Individual Goals grid, click the + icon to create a row.
    a) Select *Actual* in the Field column drop down.
    b) Select *Hide for All* in the Criteria column drop down.

3. Repeat step 2 for these options in the Field column drop down:
    - *Maximum*
    - *Minimum*
    - *Target*
4. Click OK and Done.

Result

Workday hides the Track By field in individual goals.

Next Steps

Example: Require Fields in Individual Goals

This example illustrates how to require fields in individual goals.

Context

You want to require certain fields for all workers while also requiring certain fields for workers in selected domains.

Steps

1. Access the Maintain Goal Setup task.
2. In the Configure Individual Goals grid, click the + icon to create a row.
    a) Select *Description* in the Field column drop down.
    b) Select *Require for All* in the Criteria column drop down.
3. Repeat step 2 for these options in the Field column that you want to be required for all workers.
    - *Description*
    - *Status*
    - *Due Date*
    - *Completed On*
4. Click the + icon to create a row.
    a) Select *Organization Alignment* in the Field column drop down.
    b) Select *Security Group* in the Criteria column drop down.
    c) In the Required For column, select these security groups from the drop down:
        - *Employee As Self*
        - *Contingent Worker as Self*
        - *Manager*
5. Click OK and Done.

Result

Workday displays the 4 goal fields in steps 2 and 3 with a red asterisk for all workers. Workday displays the Organization Alignment field as required for some workers.

Next Steps

FAQ: Individual Goals

How do the Cascade Goals and Manage Goals business processes work together?

Can the Manage Goals business process include different actions and notifications for different goal types?

How do I configure a review step for employees who receive cascaded goals?

Must the total weight of ad hoc goals equal 100?

How do the ***Cascade Goals*** and ***Manage Goals*** business processes work together?	The *Cascade Goals* business process automatically initiates 1 *Manage Goals* subprocess for each employee you assign the goals to. Each employee can have a different definition of the *Manage Goals* business process, depending on their supervisory organization. After initiation, the *Manage Goals* process runs all additional steps or notifications. If the process has no workflow steps, then *Manage Goals* is automatically completed. If *Manage Goals* includes notifications, the employee receives the notification at the specified workflow step.
Can the ***Manage Goals*** business process include different actions and notifications for different goal types?	Yes. You can create condition rules based on the Cascaded Goal and Contains only Editable Goals report fields to trigger workflow steps for specific goal types. Example: Build a condition rule that sends notifications only for cascaded goals, or include a review step only for cascaded goals that are editable.
How do I configure a review step for employees who receive cascaded goals?	Add a *Review Goal* action step to the *Manage Goals* business process and route the step to the *Employee as Self* security group. On the *Review Goal* step, build a condition rule using the Cascaded Goal report field to evaluate whether goals are cascaded before initiating the step.
Must the total weight of ad hoc goals equal 100?	No. You can establish a weighting scale for ad hoc goals by creating validation rules on the *Manage Goals* and *Cascade Goals* business processes. Weights are locked on non-editable cascaded goals, except when the review template requires that total weighting equal 100. When you pull goals into such a template, you can change the goal weighting. The My Goals and View Goals for Worker reports reflect the updated weighting when the review is completed.

Related Information

Concepts

Concept: Employee Goals in Employee Reviews on page 1672

Tasks

Create or Edit Individual Goals on page 1518

Development Items

Create Development Items

Prerequisites

- Configure Development Items.
- Configure security for these domains in the Career and Development Planning and Performance Enablement functional areas:
  - *Self-Service: Development Items*
  - *Self-Service: Delete Development Item*
  - *Worker Data: Development Items*
  - *Worker Data: Delete Development Item*

Context

You can create Development Items to track progress of skills and experiences you want to improve, helping your career planning and professional development. You can associate Development Items with job profiles, job interests, competencies, or work experiences to highlight their purpose.

For Career Hub customers, Generative AI (GenAI) functionality is available to:

- Help employees draft and modify content for Development Items in Career Hub.
- Suggest Development Items to employees based on their career interests.

See Concept: Career Hub.

Steps

1. Access Development Items for yourself or your team members on these reports:
   - My Development Items
   - My Team's Development Items > Development Items
2. Click Add to create a new Development Item.
3. As you complete the task, consider:

Option	Description
Development Item	Describe the Development Item in 140 characters or less.
Skills to Develop	Select skills based on your job profile, a skill category, or skill interests. When you select skills, Workday adds them as skill interests on the worker profile if they aren't already listed. Your skill interests are also updated in your Career Hub profile. If you remove a skill as a skill interest, it will still remain associated with your Development Item. Also, if you remove a skill from the Development Item, the skill will remain as a skill interest.
Relates To	Select values from the categories that the Development Item supports. Examples: • Competencies.

Option	Description
	• Job interests. • Job profiles. • Work experiences. The prompt offers suggestions based on your current job profile, competencies, and work experiences, plus any job profiles that match your job interests.

Next Steps

You can:

- Include Development Items in talent or employee reviews. After you complete the review, Workday updates these items in profiles and reports.
- Edit Development Items that aren't in active employee or talent reviews:
    - From the My Development Items report, click the edit icon on the development item.
    - In the Career Hub, click Plan to view your development items, then click Manage Development Item.
- View changes to Development Items on these reports:
    - My Development Items Changed in Last Week (Include Delete and Not Applicable)
    - My Team's Development Items Changed in Last Week (Include Delete and Not Applicable)
- Create alerts for Development Items in custom reports. Example: Copy the My Team's Development Items Changed in Last Week (Include Delete and Not Applicable) report and Configure and View Alerts.

Related Information

Concepts

Release Note: Configure Optional Fields Task for Skills to Develop on Development Items

Tasks

Configure and View Alerts

Hide or Require Optional Fields

Example: Manage Development Items in Career Hub

Context

This example illustrates how workers can use Career Hub to manage all aspects of their Development Items. Amy Frost is a sales representative at Global Modern Services (GMS). She wants to create a Development Item to improve her French skills so she can build better relationships with her new French Canadian prospects. Amy can create or edit development items and view status updates and a personalized plan in Career Hub. Amy can also track the progress of her career as she completes Development Items.

Steps

1. The Talent Administrator configures the *Self-Service: Development Items* domain policy to enable workers to create their own Development Items.
2. From the My Development Items report, Amy clicks Manage in Career Hub.

3. She clicks Add New Development Item. She enters these values to create her French Language Development Item:

Option	Description
Development Item	*Focus on French language skills.*
Additional Information	*Overall Objective: Develop a conversational level of the French (Quebecois) language.* *Enroll in an online language course to gain a solid foundation in French verbal concepts and techniques.*
Skills to Develop	By Category and *French- Communication*
Relates To	*Communication (competency)*
Status	*In Progress*
Category	*Coursework* and *Training*
Start Date	*Today's date*
Completion Date	*12/31/2026*
Status Note	*09/01/2025* *Completed initial course.*

4. Amy clicks OK.
5. She clicks Manage Development Item to access the View Development Item report.
    - If she has more information to add, she clicks Edit Development Item to add or update information related to her Development Item.
    - Workday suggests learning and flex teams that are related to the skills specified on her Development Item to help her complete it.
    - When she feels comfortable with her French language skills, she clicks Mark Complete to close the development item from Career Hub. Workday prompts her to update her Worker profile with new skills.

Result

Now Amy can view and manage her Development Item in Career Hub.

Concept: AI-Generated Development Items

Workday provides AI assistance to help employees and managers create detailed, structured, and actionable development items that align with employees' career interests.

AI assistance is available in the Career Hub and Manager Insights Hub for drafting the Additional Details field in a development item.

Feature Availability

In the Career Hub, employees can access AI assistance when creating a development item, and they can also view suggested development items based on Skills Cloud skills and their career interests.

In the Manager Insights Hub, managers can create development items for their direct reports using AI assistance.

Generating development item content isn't available when:

- Editing a saved development item in the Career Hub.
- Creating a development item from the My Development Items report or from employee reviews.

Note: Note:

- Workday supports this feature in all languages supported by Career Hub. See Workday Community: Languages.
- Workday only supports generating and modifying development item content with AI on desktop. Employees can access suggested development items on desktop and mobile, however.

Output Format

The Additional Details content for AI-generated development items has a standardized format including:

- An objective.
- Additional related skills.
- Steps with examples.
- A suggested result.

Generating and Modifying Content with AI

Before generating content with AI, users must specify 1 to 3 Skills to Develop.

Employees can enter their own content and then modify it using AI, for example, to make the generated content more specific to their organization, role, or upcoming projects. Employees can also edit the AI-generated content before saving the development item.

After generating or manually entering content in the Additional Details field, users can modify it with AI using these options:

- Make More Challenging: For advanced skill development, this option can increase the complexity of the steps, the impact of the results, and the need for data to show successful completion.
- Make Easier: Makes the item simpler and easier to achieve, for developing skills at a more basic level.
- Generate Another: Generates a different development item based on the skills to develop.
- Revert to Original: Reverts to the first version of the AI-generated content for this development item. This option is unavailable for Suggested Development Items. This option also doesn't restore content that users entered manually.

Note: Note: Users get different results each time they use AI, and they can't restore their own content after modifying it with AI. Consider instructing users to copy any Additional Information text that they want to keep before modifying it with AI.

Source Data

Source data for the AI-generated content includes:

- The skills to develop.
- The title of the development item, if you enter one.
- The employee's current business title.
- The employee's worker skills.

For transparency, users can view details about the source data alongside the generated content. See Workday Community: Career Hub Generate Development Items AI Fact Sheet for details.

Creating Development Items for Direct Reports

In the Manager Insights Hub, managers can create development items for their direct reports, from the employee's:

- Development Items & Interests.
- Career Path, if the employee has shared a career path.

When an employee receives a development item from their manager, the employee has full control over it, including editing it, deleting it, and updating its status.

Suggested Development Items

When you enable AI-generated development items, Workday surfaces suggested development items to employees in the Career Hub based on Skills Cloud skills and employee career interests. Employees can view these suggestions in:

- The Plan > For Your Career Growth section, based on the employee's skill interests, business title, and job title. These suggestions don't use skills that are already part of an in progress development item.
- The Begin Working Toward Your Next Role section of a saved career path in Explore, if enabled, based on the worker's business title, their next role, and their skill gaps for this role.

Related Information
Concepts
Setup Considerations: Manager Insights Hub on page 2933
Setup Considerations: Career Hub on page 1543
2025R1 Release Note: Career Hub: Generate Development Items
2025R2 Release Note: Generate Development Items for Workers in Manager Insights Hub

Steps: Enable AI-Generated Development Items

Prerequisites

- Configure Development Items.
- Set up 1 or both of:
    - Career Hub
    - Manager Insights Hub

Context

Employees and managers can use AI assistance for drafting the Additional Details field in a development item.

AI assistance is available:

- In the Career Hub, for employees to generate their own development items.
- In the Manager Insights Hub, for managers to generate development items for their direct reports.

Steps

1. Configure security domains.
2. Depending on the functionality that you want to use, configure these domains:

Domain	Functional Area	Access	Considerations
Self-Service: GenAI Development Items	Career and Development Planning Career Hub	Modify	Enables employees to generate their own development items with AI. Required for AI assistance for development items in the Career Hub.

Domain	Functional Area	Access	Considerations
Worker Data: Development Items	Career and Development Planning Performance Enablement	Modify	Enables managers to view and add development items for their direct reports. Required for generating development items in the Manager Insights Hub.
Worker Data: GenAI Development Items	Career and Development Planning Manager Insights Hub	Modify	Enables managers to generate development items with AI for direct reports. Required for generating development items in the Manager Insights Hub.

Security: These domains in the System functional area:

- *Security Activation*
- *Security Configuration*

3. For all employees who need to use the feature, ensure that the Skills to Develop field is enabled for View Development Item. See: Hide or Require Optional Fields.

   Employees need access to this field to generate development item content and use Suggested Development Items. This field is available for all employees by default.

4. (Optional) Configure these options in the Talent section on the Edit Tenant Setup - HCM task:

Option	Description
Development Items Help Text	Enter text to replace the default help text for creating a development item with AI assistance.
GenAI Development Items Location Exclusion	Employees and managers with a primary or additional position in these locations cannot access AI assistance while creating development items.
GenAI Development Items Hierarchy Exclusion	Employees and managers with a primary or additional position within these regions cannot access AI assistance while creating development items.

Note: Note: Managers who are not in excluded locations can generate development items for direct reports in any location.

Next Steps

To enable managers to generate development items while viewing employees' shared career paths, set up the Career Hub and enable career path sharing.

See Steps: Set Up Career Hub on page 1549.

Related Information

Concepts

Setup Considerations: Manager Insights Hub on page 2933
Setup Considerations: Career Hub on page 1543
2025R1 Release Note: Career Hub: Generate Development Items
2025R2 Release Note: Generate Development Items for Workers in Manager Insights Hub

Career Interests

Steps: Set Up Interests

Prerequisites

- Configure the *Manage Interests* business process in the Career and Development Planning functional area.
- Security: *Self Service: Interests* and *Worker Data: Interests* domains in the Career and Development Planning functional area.

Context

Enables employees to add career interests to their profiles, including:

- Job interests.
- Skill interests.
- Travel preferences.
- Relocation preferences.

When employee interests are part of talent reviews or employee reviews, business leaders can use the information for organizational development and succession planning.

You can't update interests on the worker profile when an employee review or talent review is in progress. When the review is complete, Workday displays the updated information on the worker profile.

Workday doesn't support career or job interests for contingent workers.

You can add the Interests tab to the worker profile, see Steps: Set Up Profiles and Profile Groups.

Steps

1. Set Up Career Interests on page 1538.
2. Create a Public Job Catalog on page 1537.
3. Set Up Travel Preferences on page 1539.
4. Set Up Relocation Preferences on page 1540.
5. Configure the Career profile group on worker profiles and the Talent profile group on talent pools.

Result

You can view career interest information both when you compare workers and in the:

- Career profile group on worker profiles.
- Development worklet on the Home landing page.
- Talent profile group on talent pools.
- Talent area on worker preview cards.

You can also view them on:

- Completed employee reviews.
- Talent cards.
- The View Succession Plan for Position report.

Next Steps

(Optional) To enable workers to edit their career interests, configure the Interests report on the Career profile group of the worker profile.

Related Information

Concepts

Concept: Manager Insights Hub on page 2944

Tasks

Create Custom Labels

Steps: Manage Talent Reviews on page 1608

Steps: Set Up Development Plans on page 1692

Steps: Set Up Performance Reviews on page 1679

Steps: Set Up Manager Insights Hub on page 2940

Reference

FAQ: Opportunity Graph on page 1542

The Next Level: Cultivating Career Mobility

Steps: Set Up Opportunity Graph

Context

Opportunity Graph is a graphical report for Employee as Self users to view historical job transitions from their current primary job profile.

Steps

1. Create Job Profiles on page 573.

   As you create and edit job profiles, consider:

   - Give job profiles a meaningful and appropriate name and description to display in Opportunity Graph.
   - Select the Public Job check box for as many job profiles as you can. Data in the Opportunity Graph only generates from transitions to public job profiles.
   - Enter as many details on the job profile as you can, such as competencies, skills, and other qualifications.
2. Configure the *Set Up: Opportunity Graph* domain in the Career and Development Planning functional area.
3. Access the Opportunity Graph Job Profile Transitions report (secured to the *Set Up: Opportunity Graph* domain in the Career and Development Planning functional area).

   Use this report to preview all job profile transitions, public and not public, from a job profile before exposing the Opportunity Graph to your employees. Administrators can use this report as they consider making some job profiles public to expose more transitions to employees. The transitions exposed in the report update after the weekly background job.
4. Configure the *Self Service: Opportunity Graph* domain in the Career and Development Planning functional area.

   Secure the employee as self-security group.

5. (Optional) Configure the *Persons in Opportunity Graph Job Profile* domain in the Career and Development Planning functional area.

   Provide access to see the All Employees in Role table, which returns all current workers, when viewing a specific job profile.
6. (Optional) Configure the *Worker Data: Opportunity Graph* domain in the Career and Development Planning functional area.

   This domain secures the Opportunity Graph for Others report, which enables self-service users to view job profile movement for other workers.
7. (Optional) Configure the *Learning Access* domain in the Learning Core functional area.

   The *Learning Access* domain secures the Popular for this Role section. This section displays learning content that employees in the job profile transitions have completed or rated. The Popular for this Role section only displays when 5 or more employees that your employees have access to view complete or rate learning content for a job profile on Opportunity Graph.

Result

Workday refreshes job profile transition data for Opportunity Graph every Tuesday night at 11 p.m. Pacific Time. The Opportunity Graph job transition data is available after job completion following the initial configuration. If you set up Opportunity Graph after Tuesday, then you won't see Opportunity Graph populated until the job is completed the following Tuesday. If you're testing Opportunity Graph in Sandbox, Workday recommends that you perform the initial configuration after the most recent weekly service update but before the job is executed on Tuesday night.

Related Information

Concepts

Concept: Career Path Builder on page 1562

Tasks

Configure Career Path Builder on page 1554

Create a Public Job Catalog

Prerequisites

Security: *Set Up: Job* domain in Jobs and Positions functional area.

Context

Set up a catalog of public jobs for employees to define their job interests. As a tool for individual development and career planning, employees can also compare their qualifications to those required for specific jobs.

Steps

1. Access the Create Job Profile or Edit Job Profile task.
2. Select the Public Job check box.
3. Configure these domain security policies:

Domain	Functional Area	Notes
Public Job: View (parent)	Jobs & Positions	Provides access to the job profile name and summary.
(Optional) *Public Job Qualifications: View*	Jobs & Positions	Secures the job qualifications for public jobs and is a child of the *Public Job: View* domain. Configure this domain only if

Domain	Functional Area	Notes
		you want to restrict access to job qualifications to different security groups.

Next Steps

- To confirm the security changes, access the Activate Pending Security Policy Changes task.
- View and select jobs from the public catalog:
  - Select Talent > Edit Job Interests from a worker's related actions menu.
  - On a worker profile, select Job Interests in the Career profile group and click Edit.
  - In talent reviews, complete the Jobs Interests section if it's part of the review template.
  - In employee reviews, complete the Career section if it's part of the review template.
- Compare qualifications to job interests. On a worker or talent profile, click Compare to Job on the Job Interests tab in the Career profile group.

Related Information
Tasks
Create Job Profiles on page 573

Set Up Career Interests

Prerequisites

- *Set Up: Talent* domain in Talent Pipeline functional area.
- *Worker Data: Career* (parent) domain in Career and Development Planning functional area.
- *Worker Data: Career Interests* domain in Career and Development Planning functional area.

Context

You can use career interests as directional categories for career growth. Employees can select career interests to indicate their interests in a specific category of growth, such as:

- Develop in their current role.
- Step into a new role.
- Broaden their knowledge and experience.

Steps

1. Access the Maintain Career Preferences task.
2. Specify a Name, ID, and Description for each career preference you create.
   The ID is for web services and integration purposes.
3. (Optional) To remove a preference from selection lists, select the Inactive check box.
   The preference remains valid for employees who have already selected it.

Example

Name	ID	Description
Broaden	BROADEN	Ready for different responsibilities with similar scope.

Name	ID	Description
Expand Beyond Role	EXPAND	Ready to take on a larger developmental role.
Develop At Level	DEVELOP	Likely to remain in current or similar role, dive deeper.
Too New to Rate	NEW	Not enough information to rate.

Next Steps

Specify career preferences:

- Select Talent > Edit Career Interests from a worker's related actions menu.
- On a worker profile, click Edit on the Career Interests tab in the Career profile group.
- In talent reviews, complete the Career Interests section if it's part of the review template.
- In employee reviews, complete the Career section if it's part of the review template.

Related Information
Tasks
Steps: Set Up Interests on page 1535

Set Up Travel Preferences

Prerequisites
Security:

- *Set Up: Talent* domain in Talent Pipeline functional area.
- *Worker Data: Career* (parent) domain in Career and Development Planning functional area.
- *Worker Data: Travel Preferences* domain in Career and Development Planning functional area.

Context

Define the amount of travel time that employees can select when they're willing to travel. These can be anything you determine, such as:

- Percentages.
- Number of days or weeks.
- Specific days of the week.

Steps

1. Access the Maintain Travel Amounts task.
2. Specify a Name, Amount, and ID for each travel amount you create.
   The ID is for web services and integration purposes.
3. (Optional) To remove an option, select the Inactive check box.
   The travel amount remains valid for employees who have already selected it.

Next Steps

- Specify travel preferences:
    - Select Talent > Edit Travel Preferences from a worker's related actions menu.
    - On a worker profile, select Travel in the Career profile group and click Edit.
    - In talent reviews, complete the Travel section if it's part of the review template.
    - In employee reviews, complete the Career section if it's part of the review template.

Related Information

Tasks

Steps: Set Up Interests on page 1535

Set Up Relocation Preferences

Prerequisites

Security:

- *Set Up: Talent* domain in Talent Pipeline functional area.
- *Worker Data: Career* parent domain in Career and Development Planning functional area.
- *Worker Data: Relocation Preferences* domain in Career and Development Planning functional area.

Context

You can define the areas that employees can select when they're willing to relocate. These can be anything you choose, such as:

- Business sites.
- Regions.
- Countries.

Steps

1. Access the Maintain Relocation Areas task.
2. Specify a Name, ID, and Description for each relocation area.

   The ID is for web services and integration purposes.
3. (Optional) To remove a relocation area, select the Inactive check box.

   The relocation area remains valid for employees who have already selected it.

Next Steps

Specify relocation preferences:

- Select Talent > Edit Relocation Preferences from a worker's related actions menu.
- On a worker profile, select Relocation in the Career profile group and click Edit.
- In talent reviews, complete the Relocation section if it's part of the review template.
- In employee reviews, complete the Career section if it's part of the review template.

Related Information

Tasks

Steps: Set Up Interests on page 1535

Concept: Opportunity Graph

Opportunity Graph is a graphical report for Employee as Self users to view historical job transitions from their current primary job profile. This report enables employees to explore potential career paths within your organization with learning content that's completed or rated by employees in job profile transitions. Contingent workers can't view this report.

Opportunity Graph for Others is a graphical report (secured to the *Worker Data: Opportunity Graph* domain) that enables employees to view historical job transitions for other workers to explore additional potential career paths. Managers can also use the Opportunity Graph for Others report to view historical job transitions for their team members to use during employee reviews.

What's My Next Move is a multi-tier report that enables employees to explore the historical job transitions for their job profiles, giving employees greater control over internal job movement and career planning.

Employees can access the What's My Next Move report to identify the possible job roles that others in the same job profile migrated to. Employees can access only public job profiles and explore up to 12 job transitions per job profile. Each job profile card displays the next job transition from that job profile, giving employees insights beyond their current job profile that they can use to plan their career trajectory.

Example: When a worker in the Quality Assurance job profile selects What's My Next Move, the report displays that 30% of the workers in the Quality Assurance job profile moved to the Support Analyst job profile. If the worker selects the Support Analyst job profile, the report displays that 70% of workers in the Support Analyst job profile moved to the Senior Support Analyst job profile.

These reports provide benefits to employees when:

- You create job profiles that include qualifications and job descriptions.
- The reports include many job transitions for employees to explore.
- The reports include many public job profiles, providing more transitions for employees to explore.

Note that both Opportunity Graph reports are based only on the job profile and aren't unique to a specific employee.

Related Information

Concepts

Concept: Career Path Builder on page 1562

Tasks

Steps: Set Up Opportunity Graph on page 1536

Configure Career Path Builder on page 1554

Reference

2023R2 What's New Post: Career Path Builder in Career Hub Explore

2022R2 What's New Post: Career Hub Suggested Opportunities for Job Profiles

The Next Level: Establishing a Talent Footprint

Concept: Interests

Interests in Workday enable employee as self users to create and maintain information related to their career and job interests. Using Interests, your employees can plan their career growth or job transitions within your organization. Workday doesn't support career or job interests for contingent workers.

Key Features

When you enable Interests in Workday, your employees can:

- Quickly create, revise, and post their interests through the Talent and Performance dashboard or the Career Profile.
- Plan their career trajectory by comparing their current role with other employees in your organization using the Compare Worker to Jobs report.
- Share career aspirations with managers to help plan the learning required to grow in their current roles or transition into other roles.
- Access the Opportunity Graph report to plan possible next moves for their career internally.

Business Benefits

Enable Interests in Workday to:

- Gauge employees career aspirations based on insights from interests data.
- Create strategies to enhance the on-job learning of your employees.
- Provide managers access to the Interest reports of their employees from the Development dashboard.
- Provide employees the avenue to explore career growth internally.

Interests Views

Workday provides these views to set up your employees' interests:

- Consolidated Interests - offers Career (consists of Job Profiles, Skills Interests, Career Preferences, and Career Interests), Travel, and Relocation sections under the new consolidated Interests report on the Career for Worker Profile profile group.

  Enable the *Manage Interests* business process (secured to the *Self Service: Interests* and *Worker Data: Interests* domains) to set up the consolidated interests view in the worker profile.
- Unconsolidated Interests - offers Career Interests, Job Interests (Job Profiles), Travel, and Relocation sections as separate reports in the Career for Worker Profile profile group. Workday recommends replacing these reports with the consolidated Interests report that simplifies the user experience for your employees.

Related Information

Tasks

Steps: Set Up Interests on page 1535

FAQ: Opportunity Graph

Does Opportunity Graph use an algorithm or machine learning? How does it work?	No. Opportunity Graph doesn't use an algorithm or machine learning. Instead, it exposes historical job profile transactions for every job profile in your Workday tenant. Opportunity Graph displays the percentage of moves from a worker's current job profile to other job profiles in your Workday tenant. The percentage generates using the following calculation: # of Transitions from Job Profile A to Job Profile B / # of Transitions from Job Profile A to all other Job Profiles Note that this calculation doesn't include terminations as transitions. There may be some variation depending on the timing of your calculation, as Opportunity Graph updates every Tuesday at 11:00 PM PST. Opportunity Graph data is based on all history available in your Workday tenant job profiles. There's no minimum time requirement for exposing job profile transitions. Workday includes historic transactions from inactive job profiles unless you remove them using the Edit Job Profile task. Over time, more data displays in Opportunity Graph as employees change job profiles.
Does Opportunity Graph track job change events, or job profile changes I make in Edit Position?	Yes, Opportunity Graph records job change edits as well as job profile edits to positions.
Does the Opportunity Graph include data from inactive job profiles?	Yes. Opportunity Graph uses data from public job profiles, including inactive ones. To remove inactive job profiles from Opportunity Graph, access the Edit Job Profile task and clear the Public Job check box for each inactive profile.
Does Opportunity Graph offer predictions or career advice?	No, Opportunity Graph is only based on historical job profile transitions. It doesn't predict the

	likelihood of an employee moving into a certain job profile, or recommend moves for specific employees based on a set of criteria.
Is Opportunity Graph a formal career path tool?	No, Opportunity Graph is a self-service exploration tool that employees can use to help them understand the possible transitions from their current job profile.

Related Information

Concepts

Concept: Career Path Builder on page 1562

Tasks

Steps: Set Up Interests on page 1535
Configure Career Path Builder on page 1554

Career Hub

Setup Considerations: Career Hub

You can use this topic to help make decisions when planning your configuration and use of Career Hub. 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

Career Hub is a career development platform that enables employees to discover career opportunities, plan career steps, and explore relevant skills and jobs within your organization.

We support Career Hub in:

- Chinese (Simplified)
- Chinese (Traditional)
- Danish
- Dutch
- English
- Finnish
- French (Canada)
- French (France/Continental)
- German
- Italian
- Japanese
- Korean
- Norwegian
- Portuguese (Brazil)
- Spanish
- Swedish

Business Benefits

- Enables organizations to efficiently upskill internal talent.
- Improves talent mobility by providing personalized career development opportunities.
- Increases employee engagement and retention by encouraging self-directed career and skill development within your organization.

Use Cases

With the Career Hub, your employees can:

- Define their current skills, career focus, skills development interests, and job interests.
- Use the Suggestions for You section to build a career plan by:
    - Viewing job suggestions based on the skills on their profile.
    - Creating connections and meeting mentors.
    - Participating in flex teams and learning in the areas they're interested in developing.
    - Expressing interest in project opportunities that match the skills on their profile.
- Use the Plan section to initiate outreach to saved connections and mentors, save and manage goals and jobs, and take other actions to progress their career development.
- Use the Explore section to discover:
    - Career paths based on skills, skill interests, and internal historical job transitions.
    - Suggested skills to help them develop in their current role.
    - Suggested skills related to their job interests.
    - Skills mentioned frequently in internal job posts.
- Access flex team, job, and learning suggestions within the Career Hub, when you configure Opportunity Marketplace.
- Create development items with AI assistance, helping them create actionable plans for skill development and career growth.

Questions to Consider

Questions	Considerations
Which products can you configure while setting up Career Hub?	Workday recommends configuring these products as a part of your setup to access the full suite of career development experiences available in Career Hub: • Anytime Feedback • Career Connections • Development Items • Flex Teams • Manager Insights Hub • Mentorships • Opportunity Graph • Opportunity Marketplace • Learning • Recruiting • People Experience
Do you want to limit Career Hub access to certain types of employees?	You can set up security to define the employee group that can access Career Hub. Typically, full-time employees with self-service access are best suited for Career Hub use.

Questions	Considerations
	Managers can't access their employees' Career Hub information, but they have complete self-service access as Career Hub users to further their own career development.
Do you want to enable AI functionality for employees in the Career Hub?	You can enable employees to use AI functionality when creating development items in the Career Hub. You can set up the following optional tenant configurations: • Location and hierarchy exclusions, for example, if local regulations impact your organization's use of AI. • Custom help text to display when AI is available to create development items. See: Concept: AI-Generated Development Items on page 1531.

Recommendations

- Ensure that your employees update their worker profile and skills data. Encourage workers to add 10-20 skills and 5-10 skill interests on their worker profile so that Career Hub generates more accurate connection, flex team, job, learning, and mentor suggestions.
- To enhance Career Hub's ML inference and skill suggestions, update these sections and make them available to support machine learning analysis:
  - Anytime Feedback
  - Job History
  - Learning Activity
  - Position History
  - Project History
- Ensure job profiles are public and descriptive to make it easier for Career Hub users to express interest in the jobs associated with these job profiles. Adding 5-10 skills to job profiles can improve job suggestions during Career Hub profile setup. Skills that are explicitly added to job profiles are given higher priority in matching performed by machine learning, as opposed to implicit skills.
- Ensure that mentors make themselves available and update their mentor skills to give employees access to a wider pool of available mentors in Career Hub.
- Enter Skills Needed information when creating a flex team so that employees looking for development opportunities are more likely to see relevant suggestions in Career Hub.
- Set up Home page cards using People Experience to enable Career Hub to provide timely career-related suggestions and follow-ups to users.
- For customers who use Career Hub and are Recruiting customers:
  - Consider adding Jobs Hub tasks to the Career Hub Quick Links section.
  - The Browse Jobs report is available in global search. However, consider having users discover jobs directly in Career Hub.
  - Jobs Hub is searchable. Consider removing the Careers worklet and not adding Jobs Hub to the Workday home page menu.

Requirements

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.

- You must set up Skills Cloud. See Steps: Set Up Skills Cloud on page 1852.

- You must be a Career Hub customer and meet certain requirements to use this feature. Contact your Customer Success Manager for information on Career Hub.

Limitations

- Career Hub doesn't support contingent workers.
- Match analyses and candidate recommendations only update every 24 hours, Monday through Friday, so when:
    - You expand access to flex teams to new workers, Workday can't immediately suggest them as flex team candidates.
    - Workers update their skills, their career development opportunities update immediately, but flex team hosts won't immediately see updated match analyses and candidate recommendations.
    - You create or update a job or flex team, workers' career development opportunities don't update immediately.
    - A worker is terminated, Workday won't immediately remove that worker from candidate recommendations.
- When creating or editing development items in the Career Hub, the *Generate with AI* and *Modify with AI* options are not available on mobile devices.

Tenant Setup

On the Edit Tenant Setup – HCM task, Talent section, you can:

- Enable flex team, project, and job options.
- Enable suggested learning courses for workers.
- Enable flex teams express interest notes to allow workers to create a customized message when expressing interest in a flex team.

Security

Consider the domains you want to enable as a part of your Career Hub setup.

See Reference: Career Hub Security on page 1563.

Business Processes

Business Process	Considerations
Manage Interests	Enables employees to set up the job profiles and skill interests they're interested in during the What roles are you interested in exploring profile setup. Workday recommends that you set up an initiation step and remove any approval steps so that your workers can view and select skill interests and job profiles, and have the ability to complete their Career Hub profile setup.
Manage Internal Career Apply	Gives employees the ability to apply for jobs. The Save to Plan action is available on job cards, enabling employees to begin and complete the job application process in the context of Career Hub.
Manage Goals	Enables employees to manage their individual goals. Employees have the ability to add and manage existing goals in their Career Hub Plan.

Business Process	Considerations
Manage Mentorship	Gives employees the ability to request mentorships from their saved mentors in the Plan section.

For additional business process considerations, see Setup Considerations: Talent Marketplace on page 1569.

Reporting

Reports	Considerations
Career Hub and Opportunity Marketplace Activity Metrics	Provides insights into an organization's Career Hub and Opportunity Marketplace user activity through a Workday delivered data source.
Saved Career Paths for My Organizations	Allows administrators to report on career paths saved by workers. The report includes multiple optional prompts and report fields.

Integrations

No impact.

Connections and Touchpoints

Features	Considerations
Anytime Feedback	You can enable feedback and endorsements for Career Hub users through the Quick Links section. Feedback is also available through flex team endorsements for employees.
Development Items	You can enable access to career planning and professional development-related action items for Career Hub users in the Plan section.
Goals	Employees with access to the *Self-Service: Employee Goals* domain can add existing individual goals to their Career Hub Plan. Goals with configured statuses that map to the metadata values of Not Started or In Progress are available for inclusion in Plan, and appear in the To Do tab when added. Goals that map to configured statuses of Completed or Not Applicable aren't available to add to Plan, nor are Archived goals.
Learning	Employees with access to the *Learning Access* domain can find and add learning content to their Career Hub Plan from Learning Home or My Learning. Content added to the Plan section appears as a To Do item. The View Course action allows users to mange their progress. Learning items in Plan remain in sync with those in the

Features	Considerations
	Learning Items in Your Career Hub Plan slider in My Learning. Employees can search for Learning content in the Suggestions for You and Explore sections of Career Hub.
Manager Insights Hub	The Suggested Opportunities section of the Manager Insights Hub suggests flex teams, mentors, connections, and learning opportunities for your direct reports. When you share an opportunity with a direct report through the Manager Insights Hub, it displays in their Career Hub with a Manager Suggested label. When employees share a saved career path, it is available for managers to view in the Manager Insights Hub.
Mentorships	You can use Career Hub to suggest mentors who can help employees develop their skills. Career Hub only suggests workers who opt in to mentoring. Employees can configure their mentorship preferences using the My Mentorship Preferences task.
Opportunity Graph	Opportunity Graph sources the historical data that reveal common career transitions in the Career Hub Explore section's job profile cards. Suggested career moves based on the most frequent job profile transitions from a worker's current role enables employees to explore potential career paths within your organization. The Featured Next Move and Explore Other Moves cards take users to the Job Profile Details page, where they can review suggestions for pursuing the job of interest through people connections, skills, job openings, learning content and flex teams.
People Experience	You can configure Home page cards to enable timely Career Hub reminders.
Recruiting	Employees with access to the *Internal Careers* and *Opportunity Marketplace* domains can find job suggestions in the Explore section. Job suggestions are based on the skills on a worker's profile. Employees have the ability to save jobs to their Career Hub Plan where they can begin the application process, or save the task for later. Jobs saved to Plan display the job description, posting date, primary location and job type. The job remains in the To Do tab until the application is submitted. The Remove related action is available if the employee is no longer interested in the job.

Features	Considerations
	Submitting the application moves the job to the Completed tab. A related action to view the job posting is available, and the Applied On date is viewable. The job card displays the the Browse Jobs action if the job becomes inactive, enabling users to continue their job search. Note that when browsing all opportunities, the Primary Location facet filter uses the primary location of the job posting.

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
Set Up Learning for Career Hub Plan on page 1944
Setup Considerations: Skills Cloud on page 1844
2025R2 Release Note: Share Career Paths With Managers
2025R2 Release Note: Enhanced Filtering by Job Family in Career Path Builder
2025R1 Release Note: Career Hub: Generate Development Items
2024R2 Release Note: Suggested Skills for Career Hub and Opportunity Marketplace
The Next Level: Optimizing Gigs with 2023R2+
The Next Level: Talent Optimization Deployment Strategy
The Next Level: Skills-Based Optimization Feature Demonstration
The Next Level: Career Hub Customer Experiences - Comcast and CSAA Insurance
Workday Community: Career Hub AI Fact Sheet
Workday Community: Career Hub Generate Development Items AI Fact Sheet
Setup Considerations: Manager Insights Hub on page 2933

Steps: Set Up Career Hub

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- You must be a Career Hub customer and meet certain requirements to use this feature. Contact your Customer Success Manager for information on Career Hub.
- Set up Skills Cloud.
- Review the setup considerations for Career Hub.

Context

TheCareer Hub provides your employees with personalized mentoring, connections, skills, flex teams, projects, and job recommendations to advance their careers within your organization. You must be a Talent Marketplace customer to access flex teams and jobs within the Career Hub, and a Projects and Talent Marketplace customer to access projects within the Career Hub.

Steps

1. Access the Maintain Functional Areas task.

   Select the Enabled check box for the Career Hub functional area.

   Security: *Security Configuration* domain in the System functional area.

   See Steps: Enable Functional Areas and Security Policies.
2. (Optional) Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.

   On the Innovation Services Opt-In task, select the HCM ML Features and Third Party Connectors GA on the Available Services tab in the HCM category.

   On the Maintain Innovation Services Data Selection Opt-In task in the HCM ML Features and Third Party Connectors GA innovation service, select Career Hub from the View Data Categories for Feature prompt. Select the opt-in check boxes for the categories for which you want to contribute data for Machine Learning.

   As you complete the task, consider:

Option	Description
Talent Profile Data	Required for Career Hub. Enables contribution of talent profile setup data that helps define the talent information that you track for your workforce.
Worker Profile Data	Required for Career Hub. Enables Workday to extract skills from the relevant sources on a worker: • Job title. • Job description. • Work history. • Explicit skills from the worker profile.
Job Requisition Data	(Optional) Select if your company wants to enable job recommendations.
Learning Data	(Optional) Select if your company wants to enable learning recommendations.

Option	Description
Talent Opportunity Marketplace Data	(Optional) Select to enable flex team suggestions and flex team match analysis.
Skills Data	(Optional) Select to contribute tenant data that Workday requires for skills-based matching.

3. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality.

   Security: *Set Up: Tenant Setup - Machine Learning* domain in the System functional area.
4. Access the Maintain Skills and Experience Setup task.

   In the Skills section, select:

   - Enable Workday Skills Cloud
   - Populate Suggested Skills for Workers
   - Include Tenanted Skills in Matching

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

   See Steps: Set Up Skills Cloud on page 1852.
5. Access the Domain Security Policies for Functional Area report.

   Select Domain Security Policy > Enable from the related actions menu of the domain security policy for these domains:

   - *Opportunity Marketplace* in the Talent Marketplace functional area.
   - *Self-Service: Career Hub* in the Career and Development Planning and Career Hub functional areas.
   - *Self-Service: Interests* in the Career and Development Planning functional area.
   - *Self-Service: Skills* in the Worker Profile and Skills functional area.

   Security: These domains in the System functional area:

   - *Security Activation*
   - *Security Configuration*
6. Edit Domain Security Policies.

   Set up domain security policies for the features you want to enable in the Career Hub. For details, see Reference: Career Hub Security on page 1563. These domains are required for the Career Hub:

   - *Self-Service: Career Hub* in the Career and Development Planning and Career Hub functional areas.
   - *Self-Service: Interests* in the Career and Development Planning functional area.
   - *Self-Service: Skills* in the Worker Profile and Skills functional area.
7. Access the Business Process Security Policies for Functional Area report.

   Select Business Process Policy > Edit from the related actions menu of these business processes:

   - *Manage Interests*
   - (Optional) *Manage Mentorship*

   For workers to complete their Career Hub profile setup and have the ability to view and select skill interests and job profiles, set up an initiation step and remove any approval steps for the *Manage Interests* business process.

   Security: These domains in the System functional area:

   - *Security Activation*
   - *Security Configuration*

8. Activate Pending Security Policy Changes.
9. Access the Edit Tenant Setup – HCM task.

   As you complete the Talent section, consider:

Option	Description
Enabled Opportunities within Opportunity Marketplace	The *Flex Teams*, *Jobs*, and *Projects* options enable opportunity types in Career Hub.
Enable Learning within the Opportunity Marketplace	Provide learning suggestions as a part of match analysis within Career Hub.
Enable Additional Details within Job Match Analysis	Provide users more information on how they match with a job posting.
Enable Flex Teams Express Interest Notes	Select the option to enable workers to create a customized message when expressing interest in a flex team. If enabled, a custom note isn't required to express interest. Workers can write a custom note, or leave the message field blank. Disabling the option after a worker has expressed interest with a custom note removes the note from the worker's profile.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.
10. (Optional) Enable AI assistance for generating development items. See Steps: Enable AI-Generated Development Items on page 1533.
11. Access the Maintain Career Hub and Opportunity Marketplace task.

   As you complete the task, consider:

Option	Description
Edit Quick Links	Select Customized Configuration to configure Quick Links for Career Hub and Opportunity Marketplace. The Is Career Hub or Is Opportunity Marketplace options are required for each customized row. Select Task/Report or External Link to add an option that displays in the Quick Links section. Workday saves a Customized Configuration for later use if you select the Default Configuration.
Edit Browse Filters	Select Customized Configuration to configure filters for enabled opportunity types. The Label Override doesn't impact reporting. Modified labels display only on the Browse page for the applicable opportunity type. Custom labels aren't translatable. Filters available for the Customized Configuration option are only filters supported by the opportunity types.

Option	Description
	Workday saves a Customized Configuration for later use if you select the Default Configuration.
Edit ML Preferences	Select the Hierarchy to determine the seniority of job posting recommendations provided to workers through Career Hub Explore, in the Job Openings That Match Your Skills section. The Hierarchy doesn't apply to job profile suggestions found in the Featured Next Move and Explore Other Moves sections, or those in Career Path Builder. Workday suggests jobs consistent with the worker's current grade or level, or 1 grade or level higher, based on the selected hierarchy. Select the Enable ML Suggestion Dismissal option to allow workers to dismiss machine learning flex team suggestions. If this option is enabled, workers see the Remove Suggestion option on a flex team card on the Career Hub Suggestions for You page. The Remove Suggestion option is available on both simple and advanced flex teams. When a worker selects Remove Suggestion, they are presented with a confirmation card. Selecting Don't show me this message again prevents the confirmation card from surfacing when removing additional suggestions. Removed suggestions won't appear again on the Suggestions for You page. Workers can search for removed suggestions on the Browse All Opportunities page.
Edit Explore Preferences	All Explore sections are enabled by default. Select Customized Configuration to configure the sections enabled for Career Hub Explore. To remove access to a section, uncheck the Enabled option on the applicable row. Section headers are customizable and can be overwritten to provide an improved user experience for your organization's employees. Enter a value in the Header Override field to replace the Default Header text. To configure Career Path Builder Source Preferences, see Configure Career Path Builder on page 1554.
Edit Plan Preferences	The Goals Enabled option is enabled. When selected, this option enables employees to track individual goals in Career Hub Plan.

Option	Description
	The Goal Categories Enabled field appears when you select the Goals Enabled option. Select the tenanted goal categories employees can use when adding goals to their Career Hub Plan.

Security: *Set Up: Career Hub and Opportunity Marketplace* in the Career and Development Planning, Career Hub and Talent Marketplace functional areas.

12. (Optional) Add Jobs Hub tasks to the Career Hub Quick Links section.

    Recruiting customers who want their workers to search for and apply to jobs in the context of Career Hub can:

    - Access the Maintain Hubs task and configure Jobs Hub. On the Navigation Item Override tab, select Do Not Show for the Navigation Items.
    - Access the Maintain Career Hub and Opportunity Marketplace task. In the Edit Quick Links tab, select Customized Configuration and add the Manage Job Alerts and My Referrals reports for Career Hub.
13. (Optional) Add these Career Hub cards to the Home page:

    - Get Started with Career Hub
    - Career Hub - Suggested Mentor

    See Concept: Home Page Workspace.

    Security: *Set Up: People Experience Configuration* domain in the People Experience functional area.
14. (Optional) Configure the Career Hub worklet.

    See: Steps: Set Up Dashboards and Landing Pages.

Result

Your workers can access Career Hub to set up their profiles.

Related Information
Concepts
Set Up Learning for Career Hub Plan on page 1944
Steps: Set Up Jobs Hub on page 372
Reference: Impacts of Primary Position Designation on page 889
2025R1 Release Note: Career Hub: Generate Development Items
Workday Community: Career Hub AI Fact Sheet
Workday Community: Career Hub Generate Development Items AI Fact Sheet

Configure Career Path Builder

Prerequisites

- Enable and configure Career Hub and Skills Cloud. Ensure that Career Pathing is enabled in the Edit Explore Preferences section of the Maintain Career Hub and Opportunity Marketplace task.
- Security: *Set Up: Career Hub and Opportunity Marketplace* domain in the Career and Development Planning, Career Hub, and Talent Marketplace functional areas.

Context

The Career Path Builder in Career Hub Explore enables workers to create career paths based on skills, skill interests, and internal historical job transitions.

Depending on which sources you want to use, consider these best practices to prepare your tenant for Career Path Builder:

- Ensure that your job profiles are populated with 5-10 explicit skills to improve the Skills and Skill Interests sources experiences.
  - Explicit skills are skills manually added to the job profile as a skill needed for that role. The Career Hub prioritizes explicit skills over implicit skills when matching and providing suggestions. Implicit skills are skills inferred by machine learning as needed for the role based on the job profile name and descriptive text.
- Instruct your employees to add 10-20 skills and 5-10 skill interests on their worker profile. Workers can also update their skills and skill interests from their Career Hub profile.
- To optimize the Paths Taken by Others in My Role source experience, Workday recommends having ample job transition history data. Job architecture refreshes can take an average of 12 months for the transition data to reflect the new career moves.
- Job profiles must be marked Public for suggested moves to appear when users select the Paths Taken by Others in My Role. This source uses Opportunity Graph data, and only public job profiles are suggested as possible career options. Review the Opportunity Graph calculation for details.

Steps

1. Configure these domains:
   - The *Self-Service: Career Hub Job Profiles* domain in the Career and Development Planning and Career Hub functional areas.
     - View and modify permissions are required for users to save and remove career paths.
   - (Optional) The *Persons in Opportunity Graph Job Profile* and *Self-Service: Career Connections* domains in the Career and Development Planning and Career Hub functional areas.
     - View permission is required on both domains to see the Employees in Role field on the side panel, and the Connect With People in This Role row on the Job Details page.
     - View permission is required on both domains to see connections suggestions in the Begin Working Toward Your Next Role section for a recommended role in a saved career path.
   - (Optional) The *Flex Teams* domain in the Talent Marketplace functional area.
     - View permission is required to see flex teams suggestions in the Begin Working Toward Your Next Role section for a recommended role in a saved career path.
   - (Optional) *Worker Data: Career Path* domain in the Career and Development Planning and Career Hub functional areas.
     - View permission is required for managers to view shared career paths from their direct reports. Employees can only access sharing options for their saved career paths if their direct manager has permissions for this domain.

   For details, see Reference: Career Hub Security on page 1563.
2. Activate Pending Security Policy Changes.
3. Access the Maintain Career Hub and Opportunity Marketplace task.
4. Select the Edit Explore Preferences tab.
5. The Career Path Builder Source Preferences section enables you to set up source data and ranking criteria for career path suggestions. As you complete the task, consider:

Option	Description
Default or Customized	All career path sources are enabled when you first access the administrator task.

Option	Description
	(Optional) Select Customized to determine which sources are available for users to create career paths. When you select Customized, Workday displays the Hierarchy, Order, and Level Field Type sections.
Career Path Builder Sources Enabled	(Optional) Remove the sources that you don't want to appear in the Show Next Moves Based On menu in the Career Path Builder. At least 1 of the sources are required, regardless of whether you enable Career Path Builder. Note that the Hierarchy, Order, Job Family, and Level Field Type settings only apply to the *Skill Interests* and *Skills* options.
Hierarchy	Choose whether to apply seniority constraints on job profile recommendations provided to workers: • Default (ML Generated): Rank results primarily by skills match, and do not limit results by seniority level. • Job Level or Management Level: Limit career moves to be within 1 job level or management level of the active role. Career Path Builder prioritizes moves 1 level upwards in seniority from the active role. If no more suggested moves are available at this level, Workday surfaces moves at the same level of seniority, and then 1 level downwards.
Order	If you opt in to either the Job Level or Management Level options, specify whether seniority increases in Ascending or Descending order.
Limit by Job Family	If you opt in to either the Job Level or Management Level option, specify: • *Default (None)*: Employees get suggested job profiles from any job family. • *Limit by Job Family*: Employees only get suggested job profiles from the job family of their current primary position. • *Limit by Job Family Group*: Employees only get job profiles from the job family group of their current primary position.
Level Field Type	If you opt in to either the Job Level or Management Level options, specify the field that indicates the level's seniority:

Option	Description
	• Job Level or Management Level: Use the decimal-based prefix from this field to identify seniority in your organization. • Order: Use the Order field in a Job Level Hierarchy report or Management Level Hierarchy report as the primary indicator of seniority. You can view the level prefixes and the Order field for a hierarchy on the Management Level Hierarchy report, secured to the *Worker Data: Management Chain* domain, or the Job Level Hierarchy report, secured to the *Set Up: Job* domain. See: Set Up Management Level Hierarchies on page 526 and Set Up Job Level Hierarchies on page 527.

Result

Employees can create career paths by combining career steps from the 3 path sources.

Next Steps
Use the Saved Career Paths for My Organizations report to track career paths created by your employees. This customizable advanced report uses the Saved Career Paths data source, and contains multiple, optional prompts, and report fields.
Related Information
Concepts

Concept: Career Path Builder on page 1562

Workday Community: Workday AI Fact Sheet Career Hub

Tasks

Steps: Set Up Opportunity Graph on page 1536

Process: Refine Maintained Skills for Career Hub Matching

Prerequisites

Review the following topics:

- Setup Considerations: Skills Cloud, for an overview of Skills Cloud functionality.
- Steps: Set Up Career Hub, to complete the configuration requirements for Career Hub.

Configure these security policies in the Worker Profile and Skills functional area:

- *Manage: External Skills*
- *Set Up: Skills and Experience*

Context

This topic provides a checklist of tasks to clean up your skills data, with the result of improved machine learning skills-based recommendations.

Workday automates a portion of the skills curation and management process by automatically enabling the Duplicate Skills Management and Skill Synonym Management processes for all Skills Cloud customers. These features reduce the number of semantically similar skills by reconciling them to the most standardized form of the skill. This consolidation improves the quality of skills data in your tenant.

Workday recommends waiting a minimum of 2 weeks after the automated jobs have completed in Preview and Production before evaluating your maintained skills, and proceeding with the steps below.

Skills data differs for each tenant. Use the information below as a guide.

Steps

1. Review and refine maintained skills on worker profiles.
    a) In your Production tenant, export all worker skills using the *Get Manage Skills* web service. Filter for maintained skills by referencing the skills reference ID.

       Note: By default, Skills Cloud skills have reference IDs that look similar to "REMOTE_SKILL - xxx".
    b) In your Sandbox or Implementation tenant, inactivate all maintained skills using the *Manage Skills* web service.
    c) In your Sandbox or Implementation tenant, run the *External Skills* web service to load worker maintained skills. This will allow you to see alternative Skills Cloud skill suggestions.

       For more information and configuration steps, see the Import External Skills Community article, and the Talent Web Service Directory.
    d) Review the suggestions and determine the appropriate Skills Cloud skills to replace the applicable maintained skills.
    e) In your Production tenant:
        1. Delete the maintained skills from worker profiles using the *Manage Skills* web service.
        2. Load the applicable Skills Cloud skill replacements on the worker profiles using the *Manage Skills* web service.

       Note: Workday recommends that you test *Manage Skills* web services in your Sandbox or Implementation tenants prior to making changes in Production.
2. Review and refine maintained skills on other Workday objects, including job profiles, job requisitions, learning content, and others.
    - Repeat the steps above using the relevant object's web services.
    - A sample list of associated web services includes:
        - *Get Job Profiles/Submit Job Profile*
        - *Edit Job Requisition*
        - *Get Learning Course Offerings/Put Learning Course Offering*
3. Determine a cadence for your organization to proactively review and refine maintained skills for workers.
    a) In your Production tenant, export all maintained skills using the *Get Skills* web service.
    b) Review the output of existing maintained skills to determine which to delete or Inactivate.

       Note: Maintained skills can't be deleted, only inactivated, if they're used by other objects. Inactivating a skill prevents users from adding that skill in the future, and allows your organization to retain a history of those skills.
    c) In your Production tenant, delete or inactivate unwanted maintained skills using the *Put Skill* web service.

       Note: Workday recommends that you test *Put* web services in your Sandbox or Implementation tenants prior to making changes in Production.

4. After completing the initial review and refinement of maintained skills, you can include your maintained skills in machine learning driven matching and learning recommendations.

    a. Access the Maintain Skills and Experience Setup task.
    b. Select Include Tenanted Skills in Matching.

    Note: You must subscribe to Innovation Services to use this feature. Contact your Customer Success Manager to request the Innovation Services Addendum (ISA), or see Workday Innovation Services on Workday Community for more information.

    For more information, see Setup Considerations: Skills Cloud and Steps: Set Up Skills Cloud.

Related Information

Concepts

Concept: Automated Skill Management on page 1867

Workday Community: Automatic Duplicate and Synonym Skill Management for All Skills Cloud Customers

Tasks

Steps: Enable Importing of External Skills on page 1857

Concept: Career Hub

Career Hub combines Opportunity Marketplace, Flex Teams, Skills, and Learning functionality to offer a centralized career development platform for your workforce.

With career and job profile data, skills, and interests to power machine-learning inferences, Career Hub provides personalized career opportunities that can help your workforce manage their career development. Additionally, you can surface in-demand skills and flex teams to use the talent available within your company.

Your employees have the ability to select a career focus that helps them:

- Grow in their role by discovering new connections and mentors within your company, to help with the skills they need to develop.
- Grow beyond their current role by expanding their skill set through flex teams and learning content.
- Remain open to both improving in their current role as well as developing the capabilities necessary to explore new roles.

The Suggestions for You page provides employees with personalized job suggestions and career development opportunities that they can save and access in the Plan section. The opportunity types include:

- Networking: Suggests potential mentors who are skilled in the areas the employee is interested in developing. Career Hub also recommends co-workers to connect with who share similar skills with the employee.
- Learning: Provides personalized, skill-based learning content, as suggestions that help your employees develop their skill interests.
- Experiences: Suggests opportunities for employees to contribute to the organization and grow their skills with hands-on experience. Experiences include flex teams and projects. Flex teams can bring together employees from across an organization to contribute to short- or long-term nonbillable assignments, either alongside their regular work or as a full-time assignment. Projects are a way of planning and tracking work in Financial Management and can be nonbillable internal projects or billable projects that your organization carries out for its customers.

The Plan page displays saved career opportunities such as check-ins, development items, flex teams, individual goals, and learning. Employees can use the Plan section to:

- Track on-going mentorships and to meet with connections.
- Identify the specific career development actions that they should take to further their career interests, and use Generative AI (GenAI) to quickly fill any gaps between their interests and their development plan.

- Access on-going and completed career development items during career conversations.
- Track job opportunities they're interested in and have applied to.
- Track individual goals and manage their progress.
- View and manage learning content that remains in sync with the Learning application, ensuring they can keep track of their progress.

Development Items completed before the user set up their Career Hub profile aren't displayed in the Plan section. The Plan section also doesn't support projects.

The Explore page enables employees to discover skills mentioned frequently in internal job posts. The skills are related to their current role or job interests, improving their career opportunities and suggestions. Based on employee skill interests, we provide relevant connection, flex team, and job recommendations that employees can save to the Plan section to determine their next career steps.

Incorporating Opportunity Graph insights into Explore reveals common career transitions for workers, supporting greater internal job mobility. The Featured Next Move and Explore Other Moves sections suggest potential moves, based on the worker's current job profile and a comparison with the Opportunity Graph's historical job transitions in your organization. The Job Profile Details page provides visibility and potential interest in future job options by surfacing people connections, skills, job openings, learning opportunities and flex teams.

The Career Path Builder, in Explore, is an interactive career exploration tool that enables workers to visualize their future careers in your organization based on skills, skill interests, and historical job moves. A career path includes a progression of roles, and actionable suggestions to help employees upskill for the next step. These suggestions include GenAI development items that help employees make actionable plans to fill skill gaps for their next role.

Opportunity Marketplace in Career Hub

If you're an Opportunity Marketplace customer and have signed-on to Career Hub, you can access the flex teams, jobs, and projects features directly from the Career Hub. Opportunities that you previously created remain accessible within Career Hub. Flex teams, jobs, and projects functionality remain accessible to Opportunity Marketplace customers who aren't Career Hub customers.

Machine Learning Suggestions in Career Hub

Machine learning factors in the employee's career focus, experience, job profile interests, skill interests, and the skills they have to return personalized learning, flex team, job, project, networking, and skill recommendations that help the employee with up-skilling towards the next step.

AI-Generated Development Items in Career Hub

Career Hub includes AI assistance to help employees create detailed, structured, and actionable development items that align with their desired skill development, current role, and chosen career path. Employees can use AI assistance when drafting content in the Additional Information field of a development item, and view suggested development items in Career Hub > Plan and on saved career paths in Explore > Career Path Builder.

See: Concept: AI-Generated Development Items on page 1531.

Related Information

Concepts

Set Up Learning for Career Hub Plan on page 1944

2025R1 Release Note: Career Hub: Generate Development Items

The Next Level: Skills-Based Optimization Feature Demonstration

Workday Community: Workday AI Fact Sheet Career Hub

Workday Community: Workday AI Fact Sheet Career Hub Generate Development Items

Concept: Career Hub and Opportunity Marketplace Activity Metrics

Note: The solution described in this section isn't part of the Workday Service. See Legal Notice for details.

The Career Hub and Opportunity Marketplace Activity Metrics report provides you with insights into your organization's Career Hub and Opportunity Marketplace user activity through a Workday delivered data source. Workday collects, transforms, and delivers your internal activity metrics data through this advanced report, enabling you to better understand how your workers are interacting with both applications.

Due to the specific type of data collected, this report only displays data in your Production tenant. Workday refreshes the data on the third day of every month.

To account for potential delays or corrections of data irregularities, we recommend that you:

- Check the report on or after the sixth day of the month.
- Use this report as a supplementary tool in combination with other user activity data.

Workday provides you with counts of monthly unique visitors on these pages:

- Suggestions For You
- Plan
- Explore

The report also includes total counts of these data points. The count returned in the report represents the total number of times, per month, users:

- Viewed the side panel for connection, flex team, job, mentor, and learning cards after clicking the associated opportunity card.
- Selected the Save to Plan action for connection, flex team, learning, and mentor opportunities.
- Selected the Request as Mentor action from a mentor opportunity card, from the side panel, or from the Plan page.
- Selected the flex team Express Interest action from the side panel, or from the Plan page.

Note: The Save to Plan action from Explore job profile cards isn't included in the monthly count.

The report is secured to the *Reports: Career Hub* domain. Administrators and users with access to this domain can copy, edit, and filter the report to meet their requirements.

This advanced report returns counts for all data points, and doesn't contain any contextual worker information. Administrators and users can't drill into the counts, as they're presented as fixed data points for the applicable month.

The report contains a maximum of 24 months of data, starting with November 2023 as the earliest available month. When the report reaches 24 months of data, the oldest month is removed and replaced by the most recent month.

The report data source, Career Hub and Opportunity Marketplace Activity Data, and report fields, are available for use in creating custom reports and condition rules. Facets aren't supported for this data set if used in custom reporting.

You can add the report as a worklet to a dashboard. For example, to add this report to the Home dashboard, edit the report and select the Output tab. Select the Enable as Worklet option, and Home as the Available On option. Access the Maintain Dashboards task, and select Home. Edit the Content, and add a row to the Worklets. Select the Career Hub and Opportunity Marketplace Activity Metrics report.

Related Information

Concepts

Concept: Business Objects, Data Sources, and Fields

Tasks

Enable Reports for Related Worklets

Concept: Career Path Builder

The Career Path Builder in Career Hub Explore enables workers to create and save career paths based on skills, skill interests, and internal historical job transitions. Workday surfaces potential paths through a series of job profiles, with each step including actionable career development opportunities and suggestions. The Career Path Builder uses career and job profile data, the Skills Cloud, and skill interests to power machine-learning inferences and suggestions.

Career pathing enhances worker awareness of internal career options, which improves talent retention and career mobility. Engaged workers can identify and pursue specific skills that prepare them for future career moves.

Career Path Sources

Employees can create career paths by combining career steps from the 3 path sources:

- Paths Taken by Others in My Role displays the percentage of people who moved into the role from the worker's current role, based on historical job transitions.
- Skill Interests displays the number of skills on the job profile that match the worker's skill interests.
- Skills displays the number of skills on the job profile that match the worker's skills.

The Skill Interests and Skills source options use machine learning.

The first suggested move in the Career Path Builder is based on the worker's:

- Explicit skill interests or explicit skills on their worker profile, and
- Skills inferred by machine learning, as a result of reviewing details from the worker's current job profile, including the job title, job description, additional job description, job profile summary, and job family.

After a user selects the initial job profile suggestion, subsequent suggested moves are based on the explicit and inferred skills of the selected job profile, with machine learning taking into account recommended skills.

Career Path Builder suggests up to 15 moves for each step of the career path.

Sharing Career Paths

When you implement the Manager Insights Hub, you can also enable employees to share a career path with their manager, making it easier for managers to support employee upskilling, career growth, and internal mobility.

When employees first save a career path, it is private. When they share a career path, their manager receives a notification and can view the career path and a skills match analysis in the Manager Insights Hub.

An employee can share only 1 path at a time. If there is already a shared path, it becomes private when the employee shares a new one.

See Reference: Manager Insights Hub on page 2944 for details.

Maintain Career Hub and Opportunity Marketplace

Using the Maintain Career Hub and Opportunity Marketplace task, you can choose to rank suggested job profiles primarily by seniority instead of skills.

- You can select Job Level or Management Level to limit suggested job profiles to within 1 job level or management level of the active role, and prioritize them in order of:
  - Moves 1 level upwards.
  - Moves at the same level. Workday only surfaces these moves if there are no more suggestions available at 1 level upwards.
  - Moves 1 level downwards, if there are no more suggestions at 1 level upwards or at the same level.

  With this setup, skills match is a secondary criteria for ranking suggested job profiles.
- You can specify whether seniority is ascending or descending in the hierarchy.
- You can choose whether to determine the seniority of job or management levels using the levels' decimal-based prefixes or their Order.
- To increase the relevance of job suggestions, you can limit them to the employee's current job family or job family group.

Limitations

The Career Path Builder doesn't suggest next moves if:

- No historical transitions from the worker's current role exist, and
- The worker hasn't added skill interests or skills to their worker profile.

Related Information

Concepts

2025R2 Release Note: Enhanced Filtering by Job Family in Career Path Builder

2025R2 Release Note: Share Career Paths With Managers

2025R1 Release Note: Career Path Builder Expanded Hierarchy Configuration Preferences

Tasks

Configure Career Path Builder on page 1554

Steps: Set Up Opportunity Graph on page 1536

Reference

FAQ: Opportunity Graph on page 1542

Reference: Career Hub Security

Workday provides these configurable domains that you can use to set up different features within Career Hub.

Domains	Access Modes	Considerations
The *Internal Careers* domain in the Recruiting functional area.	View	Enables: • Users to view job suggestions based on the skills in their profile. • Users to view jobs in the Completed tab of their Career Hub Plan for which they've submitted an application.
The *Learning Access* domain in the Learning Core functional area.	View and Modify	Enables: • Users to view recommended learning content based on specific skills.

Domains	Access Modes	Considerations
		• Access to the Grow Your Career and Learning Items in Your Career Hub Plan sliders on the Maintain Learner Experience task.
The *Opportunity Marketplace* domain in the Talent Marketplace functional area.	View and Modify	Enables access to the Opportunity Marketplace. When you're a Recruiting customer and have internal jobs posted, the *Opportunity Marketplace* domain provides access to internal job postings for Career Hub users. Enable the *Jobs* options on the Edit Tenant Setup - HCM task to view internal jobs in Career Hub.
The *Persons in Opportunity Graph Job Profile* domain in the Career and Development Planning functional area.	View	Permissions on the *Persons in Opportunity Graph Job Profile* and the *Self-Service: Career Connections* domains are required to: • View the Employees in Role field on the side panel, and the Connect With People in This Role row on the Job Details page. • View connections suggestions in the Begin Working Toward Your Next Role section for a recommended role in a saved career path.
The *Reports: Career Hub* domain in the Career and Development Planning and Career Hub functional areas.	View and Modify	Enables access to report data sources and fields for Career Hub and Career Path Builder. Secures access to the Saved Career Paths and Suggested Career Steps data sources, and the Saved Career Paths for My Organizations standard report.
The *Self-Service: Anytime Feedback* domain in the Performance Enablement functional area.	View and Modify	Enables users to request and view feedback.
The *Self-Service: Career Connections* domain in the Career and Development	View and Modify	Enables users to add career connections.

Domains	Access Modes	Considerations
Planning and Career Hub functional areas.		Permissions on the *Self-Service: Career Connections* and the *Persons in Opportunity Graph Job Profile* domains are required to: • View the Employees in Role field on the side panel, and the Connect With People in This Role row on the Job Details page. • View connections suggestions in the Begin Working Toward Your Next Role section for a recommended role in a saved career path.
The *Self-Service: Career Hub* domain in the Career and Development Planning and Career Hub functional areas.	Modify	Enables: • Users to set up their Career Hub Profile and have view and modify access to Career Hub data. • Users to save jobs to their Career Hub Plan.
The *Self-Service: Career Hub Job Profiles* domain in the Career and Development Planning and Career Hub functional areas.	View and Modify	Enables: • Users to view job profile suggestions in Career Hub Explore. • Users to save and remove career paths in the Career Path Builder. The domain is required for Career Path Builder.
The *Self-Service: Check-Ins* domain in the Performance Enablement functional area.	View and Modify	Enables users to manage their check-ins from the mentor card in Career Hub Plan.
The *Self-Service: Development Items* domain in the Career and Development Planning and Performance Enablement functional areas.	View and Modify	Enables users to add development items to progress career goals.
The *Self-Service: Employee Goals* and *Set Up: Goals* domains in the Performance Enablement functional area.	View and Modify	Enables: • Users with modify permission on the *Self-Service: Employee Goals* domain to add existing individual goals to their Career Hub Plan.

Domains	Access Modes	Considerations
		• Administrators with modify permission on the *Set Up: Career Hub and Opportunity Marketplace* and *Set Up: Goals* domains to Edit Plan Preferences.
The *Self-Service: GenAI Development Items* domain in the Career Hub and the Career and Development Planning functional areas.	View and Modify	Enables: • Users to create and modify content for development items using AI. • Users to access suggested development items with AI-generated content in the Plan page of the Career Hub and on saved career paths.
The *Self-Service: Mentoring* domain in the Career and Development Planning functional area.	View and Modify	Enables users to view and modify career actions relevant to connections, skills, and mentoring.
The *Self-Service: Skills* domain in the Worker Profile and Skills functional area.	View and Modify	Enables: • Users to view and modify their skill interests. • Users to view and modify their mentor skills on the My Mentorship Preferences task. This domain is required for the Career Hub.
The *Worker Data: Career Hub* domain in the Career Hub functional area.	View	Enables users to access data and report fields on another worker's Career Hub usage, including their Career Hub Profile status.
The *Worker Data: Career Path* domain in the Career and Development Planning and Career Hub functional areas.	View	Enables managers to view career paths that their direct reports share with them. When an employee's direct manager has access to this domain, the employee can share 1 of their saved career paths. See: Concept: Career Path Builder on page 1562. Managers view shared career paths in the Manager Insights Hub.

Domains	Access Modes	Considerations
These domains in the Career and Development Planning functional area: • *Self-Service: Interests* • *Worker Data: Interests*	View and Modify	Enables users to view and modify their career interests, and view other user's interests. *Self-Service: Interests* is required for the Career Hub.
These domains in the People Experience functional area: • *People Experience Access* • *Set Up: People Experience Configuration*	View	Enables users to view Workday Today Career Hub cards.
These domains in the Staffing functional area: • *Worker Data: Current Job Profile Information* • *Worker Data: Current Staffing Information* • *Worker Data: Time in Position* • *Worker Data: Job Family on Worker Profile* • *Worker Data: Business Title on Worker Profile*	View	Enables users to view information about another worker's staffing details, including job profile, length of service, time in position, job family, and business title.
These domains in the Talent Marketplace functional area: • *Flex Team Worker Data* • *Flex Teams* • *Manage: Flex Teams* • *Manage: Flex Team Types* • *Manage: Flex Teams Host Access* • *Profile Group: Flex Teams* • *Self-Service: Flex Teams* • *Set Up: Flex Teams* • *Set Up: Career Hub and Opportunity Marketplace* • *Worker Data: Flex Teams*	View and Modify	Enables: • Administrators and flex team hosts to create and modify flex teams. • Administrators to configure which flex team types a flex team host can create. • Career Hub users to access and express interest in recommended flex teams. • Career Hub users to see flex team suggestions in the Begin Working Toward Your Next Role section for a recommended role in a saved career path. • Administrators with modify permission on the *Set Up: Flex Teams* domain to configure flex team availabilities. • Administrators with modify permission on the *Set Up: Flex Teams* domain

Domains	Access Modes	Considerations
		to view flex teams created by other flex team hosts. • Administrators with modify permission on the *Set Up: Career Hub and Opportunity Marketplace* domain to configure browse filters, Quick Links, and job level preferences.
These domains in the Worker Profile and Skills functional area: • *Person Data: Education* • *Person Data: Job History* • *Person Data: Skills*	View	Enables users to view information about another worker's education, job history, and skills.
These domains in the Contact Information functional area: • *Person Data: Home Phone* • *Person Data: Work Phone* • *Person Data: Work Email*	View	Enables users to view another worker’s phone number and email address, for example when viewing available mentors or connections.

Related Information

Concepts

Set Up Learning for Career Hub Plan on page 1944

FAQ: Career Hub

Does Career Hub use existing skills values after setup?	Career Hub uses the skills data present on the Worker Profile. You can import tenanted skill values into Career Hub by using the Maintain Skills and Experience Setup task.
What's the impact of each career focus option?	Your users can select the career focus option that best suits their career growth needs. Based on the career focus, job interests, and skill interests, Career Hub uses machine-learning inferences and talent trends within your company to provide personalized career opportunities such as connections, mentors, flex teams, jobs, and learning items. Users can take actionable next steps to incrementally gain expertise toward their career focus or explore career opportunities to develop skills. In the Grow Beyond Role option, Career Hub provides users with personalized career opportunities to pursue job interests beyond their current role. Using the available pool of job profiles in your company, Career Hub makes it possible for users to select job interests and add relevant skill interests to develop for the new role. This option is

	best suited for users looking to transition into other roles within your company. The Grow in Role option enables users to focus on developing the skills and capabilities necessary to perform better in their current role. Selecting this option surfaces customized career opportunities that users can act on to gain greater expertise within their role. The Open to Both option is suited for users that need the flexibility to grow in their current role while also making progress toward their job interests.
Why can't users see any suggestions? Is machine learning not working?	For users to see suggestions, ensure that you include sufficient skills in flex team descriptions and job profiles. Your users can see a wider pool of mentors when available mentors update their mentor skills. Users can improve their Career Hub suggestions for learning content and jobs by updating the skills on their worker profile and making themselves available for flex teams. Additional attributes such as job titles, education, and years of experience determine the machine learning based suggestions.
How often are suggestions updated in Career Hub?	Career Hub updates suggestions daily, Monday through Friday.

Talent Marketplace

Setup Considerations: Talent Marketplace

You can use this topic to help make decisions when planning your configuration and use of Talent Marketplace. 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

Talent Marketplace consists of the Opportunity Marketplace and Flex Teams applications, which connect your workforce with opportunities based on your workers' skills, experience, and interests. With Talent Marketplace, users can:

- Explore career growth opportunities by accessing jobs, flex teams, and projects, and associated learning content suggestions.
- Create and manage flex teams, forming internal teams with varying commitments and durations.

We support Talent Marketplace in:

- Chinese (Simplified)
- Chinese (Traditional)

- Danish
- Dutch
- English
- Finnish
- French (Canada)
- French (France/Continental)
- German
- Italian
- Japanese
- Korean
- Norwegian
- Portuguese (Brazil)
- Spanish
- Swedish

Business Benefits

Talent Marketplace uses machine learning and the Skills Cloud to help you:

- Create and manage internal opportunities based on skills.
- Find the right candidates for opportunities based on their identified skills.
- Optimize talent resources by identifying and matching workers with opportunities where they might have the most impact.
- Increase employee engagement by providing visibility into specific skills needed for opportunities.

Use Cases

Organizations can provide employees opportunities where they can use their skills and develop their interests.

Employees can use the Opportunity Marketplace to strengthen their talent profile, make connections, and grow their careers within an organization.

Contingent workers can use Opportunity Marketplace to browse and apply to suggested jobs and Flex Teams based on their skills.

Questions to Consider

Questions	Considerations
Do you have a global workforce?	The machine learning that Talent Marketplace uses for recommendations currently supports these languages: • Chinese (Simplified) • Dutch • English • French (Canada) • French (France) • German • Italian • Japanese • Korean • Portuguese (Brazil) • Spanish (Neutral)

Questions	Considerations
	You can create intersection security groups to limit access to locations or organizations that support these languages.
Will you include jobs in Opportunity Marketplace?	To ensure that employees and contingent workers get the best possible matches with job opportunities, confirm that your jobs have accurate: • Job titles • Job profile descriptions • Job profile summary • Skill qualifications
Will you include projects in Opportunity Marketplace?	For Workday Projects customers, Opportunity Marketplace includes a Projects to Work On section that helps employees find project assignments that match well with their skills. Project managers can enable their projects for display in Opportunity Marketplace. To surface projects to workers with the appropriate skills, they also need to add skills as project role requirements. To save time setting up projects for skills-based matching, consider adding skills as project role requirements for your project roles or resource plan templates. See: Create Projects.
How do you want to use skills with Talent Marketplace?	Talent Marketplace uses the Skills Cloud to determine what skills an employee might have from their current role, education, and job history. When suggesting flex teams to workers and workers to flex teams, Workday compares the skills on the flex team to the skills on the worker's profile. Machine learning identifies when workers' skills match the skills listed on the flex team, including if workers' skills are similar enough so as to provide coverage of skills listed on the flex team. Job suggestions are based on a comparison of the skills that the worker has explicitly added to their profile with the skills that Workday infers from the job requisition. When suggesting project opportunities to workers, Workday compares the skills on the worker’s profile to the skills on the project role requirements. Flex team hosts can provide skill endorsements for members of a completed flex team. When a flex team host endorses a skill, Workday adds the skill to the member's worker profile.

Questions	Considerations
Do you want to implement Flex Teams without Opportunity Marketplace?	When you implement Flex Teams without Opportunity Marketplace, workers can still access flex team opportunities using the Browse Flex Teams report. Implementing Opportunity Marketplace with Flex Teams helps connect workers to flex teams through skills-based suggestions.
Do you want contingent workers to participate in Flex Teams?	You can enable contingent workers to join or host Flex Teams. Contingent workers can access the Flex Teams Your Company Needs Help With section in Opportunity Marketplace to view suggested Flex Teams based on their skills, but they cannot access Flex Teams to Help You Develop. Note: Workday provides the ability to enable contingent workers to use Flex Teams as a configuration option for use at your discretion. You must always verify any configurations in your tenant and should consult with your own legal counsel to determine if the configurations meet your business and compliance needs. See: Steps: Set Up Security for Talent Marketplace on page 1585.
How do you want Flex Team hosts to give feedback to their team members?	When completing a Flex Team, hosts can provide skill endorsements and anytime feedback to their workers. See Steps: Set Up Feedback on page 1737 and Steps: Set Up Skill Endorsements and Ratings on page 1860. You can also enable Flex Team hosts as additional managers in performance reviews for their team members. See Steps: Set Up Additional Manager Evaluations on page 1683.

Recommendations

- When you implement Talent Marketplace for the first time, we recommend that you start with a small part of your organization. Use the feedback and experience from this group to develop your Talent Marketplace before introducing it to the broader organization.
- When you only enable flex team opportunities for the Opportunity Marketplace, configure a selection of available flex teams before giving workers access to the feature.
- When you enable jobs for contingent workers, create an internal career site for non-workers so they can search for and apply to jobs.
- For customers who use Opportunity Marketplace and are Recruiting customers:
    - Consider adding Jobs Hub tasks to the Opportunity Marketplace Quick Links section.
    - The Browse Jobs report is available in global search. However, consider having users discover jobs directly in Opportunity Marketplace.
    - Jobs Hub is searchable. Consider removing the Careers worklet and not adding Jobs Hub to the Workday home page menu.

- To ensure that opportunity matching works in your implementation tenant, access the Maintain Weekly Machine Learning Activation for Implementation Tenant task and select the HCM ML Features and Third Party Connectors GA service check box. This task enables Workday to refresh matches every Monday. To refresh matches manually once every 24 hours, access the Run On-Demand Machine Learning Activation for Implementation Tenant task. These tasks are specific to your implementation tenant only, and are not supported in Production or Sandbox tenants.
    - If you've opted into HCM Machine Learning Early Access (EA) Features using the Innovation Services Opt-In task, you must select both this service check box, and the GA option, when running the Maintain Weekly Machine Learning Activation for Implementation task.
    - Similarly, to refresh matches manually, you must select both GA and EA check boxes when running the Run On-Demand Machine Learning Activation for Implementation Tenant task.
    - If both GA and EA aren't selected when running either task, neither service will complete successfully, and models for both selections won't be created.

Requirements

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.

Limitations

- Workday only uses Skills Cloud skills when matching workers to opportunities.
- Career interests and suggested projects aren't supported for contingent workers.
- You can't configure help text for the *Add Flex Team Member* business process.
- Match analyses and candidate recommendations only update every 24 hours, Monday through Friday, so when:
    - You expand access to flex teams to new workers, Workday can't immediately suggest them as flex team candidates.
    - Workers update their skills, their career development opportunities update immediately, but flex team hosts won't immediately see updated match analyses and candidate recommendations.
    - You create or update a job, flex team, or project, workers' career development opportunities don't update immediately.
    - A worker is terminated, Workday won't immediately remove that worker from candidate recommendations.
- For Career Hub customers, the Save to Plan option isn't available for suggested projects.

Tenant Setup

On the Edit Tenant Setup - HCM task, in the Talent section, you can:

- Enable flex teams, jobs, and projects as opportunities within the Opportunity Marketplace.
- Enable suggested learning courses for workers viewing their flex team match analysis.
- Restrict suggested jobs to a worker's primary location. Selecting this option restricts suggested jobs to the worker's country, designated by the primary location for the worker. For example, if a worker's primary location is San Francisco, the worker will only see suggested jobs with a location in the United States.
- Enable flex teams express interest notes to allow workers to create a customized message when expressing interest in a flex team.

On the Edit Tenant Setup - Notifications task, in the Notification Delivery Settings section, HCM category, you can:

- Configure notification settings for Flex Teams and Marketplace Opportunity Promotion.

Security

Configure these security domains in the Talent Marketplace functional area.

Domains	Considerations
Flex Team Worker Data	Enables users to view a flex team candidate's availability, skills, and skill interests.
Flex Teams	Enables workers to: • Access flex teams. • Express or remove interest in flex teams. • Display as a candidate when they're a match for a flex team. • Receive notifications for flex team promotions. • Access the Flex Team Hosts prompt category when adding additional managers to a performance review.
Manage: Flex Teams Host Access	Enables users to access the Manage Flex Teams landing page, where they can: • Create flex teams. • View all flex teams that they manage.
Manage: Flex Teams	Enables users to view and edit their flex teams and flex team members. You can create and assign a: • Constrained role-based security group for flex team hosts to manage only the flex teams that they create. • User-based security group for flex team administrators to manage all flex teams across your tenant.
Manage: Flex Team Types	Secures flex team types. By default, users with the ability to create flex teams can create all flex team types. You can create a segment-based security group using the Flex Team Type security segment to restrict access to certain flex team types. When you configure segmented security, update the *Manage: Flex Team Types* domain security policy by adding the segment-based security group and removing the All Users security group.
Opportunity Marketplace	Enables employees and contingent workers to access Opportunity Marketplace.
Reports: Flex Teams	Enables users to access reports about the usage of flex teams and their impact in your organization. Some reports secured to this domain require additional domain access to view, because they contain data that is secured to a different domain.

Domains	Considerations
Self-Service: Flex Teams	Enables workers to view their own flex team history, including flex teams they've expressed interest or participated in.
Set Up: Flex Teams	Enables administrators to configure flex team availabilities utilizing the Maintain Flex Teams Availabilities task. Enables users to create categories and types for flex teams. To enable flex team administrators to view flex teams created by other flex team hosts, they must have Modify permission on the *Set Up: Flex Teams* domain.
Set Up: Career Hub and Opportunity Marketplace	Enables administrators to configure browse filters and job level preferences when running the Maintain Career Hub and Opportunity Marketplace task.
Worker Data: Flex Teams	Enables users to view a another worker's flex team history, including flex teams the worker expressed interest or participated in.

To ensure that Talent Marketplace works properly across your tenant, configure these domains.

Domains	Considerations
Candidate Data: Job Applications in the Recruiting functional area.	Enables users to access candidate job applications. Grant View permission to administrators who need to use the Internal Job Application Rate by Flex Team Membership report.
Worker Data: Historical Staffing Information in the Staffing functional area.	Enables users to access workers' historical information. Grant View permission to administrators who need to use the Internal Movement Rate by Flex Team Membership report.
Internal Careers in the Recruiting functional area.	When you enable job opportunities, ensure that employees have View permission so that they can view internal job postings in Opportunity Marketplace.
Learning Access in the Learning Core functional area.	Ensure that employees have View permission when you enable Workday to suggest learning courses to workers when they view their flex team match analysis.
Person Data: Skills in the Worker Profile and Skills functional area	Grant Administrator, Manager, and Partner security groups Modify permission to access another worker's skills.
Self-Service: Interests in the Career and Development Planning functional area.	Ensure that employees have Modify permission to access and manage their skills interests.

Domains	Considerations
Self-Service: Personal Data in the Personal Data functional area.	Ensure that workers have Modify permission to manage their own personal information.
Self-Service: Resource Management in the Projects functional area.	Enables employees to view projects and resource plans, including viewing and expressing interest in suggested projects in Opportunity Marketplace.
Self-Service: Skills in the Worker Profile and Skills functional area.	Ensure that workers have Modify permission so that they can add suggested skills to their profiles.
Worker Data: Anytime Feedback in the Performance Enablement functional area.	Grant Administrator, Manager, and Partner security groups View permission to see ad-hoc feedback for a worker.
Worker Data: Interests in the Career and Development Planning functional area.	Grant Administrator, Manager, and Partner security groups View permission to see workers' skill interests.
In the Performance Enablement functional area: • *Self-Service: Anytime Feedback* • *Self-Service: Feedback*	Ensure that workers have View permission on these domains so they can view feedback from a flex team.
In the Staffing functional area: • *Self-Service: Current Staffing Information* • *Worker Data: Public Worker Reports*	Ensure that workers have View permission on these domains so they can see public information on their worker profile and other workers' profiles.

Business Processes

Business Processes	Considerations
Add Flex Team Member	Configure to enable users to add workers to a flex team. We recommend adding an approval step for workers, including contingent workers if you want to enable them to join flex teams.
Manage Flex Team	Configure to enable users to create and edit simple and advanced flex teams. Ensure that users who can initiate this business process have access to either the *Manage: Flex Teams* or *Manage: Flex Teams Host Access* domains. Workday automatically assigns the flex team host role to the flex team creator. Workday recommends adding the same security groups to the Create Flex Team and Edit Flex Team business process initiating actions to ensure that flex team hosts can always edit their flex teams. To edit a flex team they've created, flex team hosts must be part of a security group secured to the Edit Flex Team initiating action that has the Workday assignable role of Flex Team Host.

Business Processes	Considerations
	Administrators and flex team hosts can edit a flex team from the Manage All Flex Teams or flex team detail page. The flex team Team Type is not editable after the flex team is created. Note: Note: Edit Flex Team automatically approves and doesn't use any of your configured approval steps or routing rules on the *Manage Flex Team* business process definition.
Give Feedback	Configure to enable flex team hosts to provide feedback for workers in a completed simple or advanced flex team. Flex team hosts can complete individual flex team roles from the flex team detail page. Administrators and flex team hosts can complete a flex team or flex team role that has at least one approved flex team member, or has the status of Fully Staffed.
Manage Interests	Configure for employees to edit their skill interests.
Project Express Interest	Configure to enable employees to express interest in projects.

Reporting

Reports	Considerations
Browse Flex Teams	Provides access to flex teams outside of Career Hub or Opportunity Marketplace. Workers can view and express interest in flex team opportunities.
Career Hub and Opportunity Marketplace Activity Metrics	Provides insights into an organization's Career Hub and Opportunity Marketplace user activity through a Workday delivered data source.
Manage Flex Teams	Flex team hosts can manage and create flex teams. Members of a user-based security group with access to this report can view all flex teams.
Flex Teams Participation Rate	Provides visibility into the rate at which workers participate in flex teams by organization.
Internal Job Application Rate by Flex Team Membership	Enables you to compare the internal job application rate for workers who participate in flex teams against workers who do not.
Internal Movement Rate by Flex Team Membership	Enables you to compare the rate of internal movement, such as transfers and promotions, of workers who participate in flex teams against workers who do not.
My Flex Team Events	Flex team hosts and administrators can view business process events and information,

Reports	Considerations
	including Flex Team Name, Flex Team Status, Flex Team Approved Members, Flex Team Start Date, and Flex Team End Date.
Simple and Advanced Flex Teams	Flex team hosts and administrators can report on flex teams across their organizations. Includes a calculated field, Team Type for Flex Team. The team type attribute is on the Flex Team related business object.
Total Number of Flex Teams by Status	Provides insights about the lifecycle of flex teams in your organization by showing the total number of flex teams by status.
Total Number of Flex Teams Created	Provides visibility into the total number of simple and advanced flex teams created.
View Recommended Projects from Opportunity Marketplace	Project workers use this report to find and express interest in project roles based on skills match. They can access this report from the Projects to Work On section of Opportunity Marketplace when projects are enabled there.

Integrations

Web Services	Considerations
Manage Flex Team	Enables you to create or update flex teams using the *Manage Flex Team* business process.
Get Flex Teams	Enables you to retrieve simple and advanced flex teams.
Complete Flex Team	Enables you to complete simple flex teams and flex team roles. Advanced flex teams become complete when all of the roles are complete.
Add Flex Team Members Get Flex Team Members	Enables you to add workers to flex team roles and simple flex teams, and to retrieve approved flex team members.
Get Flex Team Availabilities Put Flex Team Availability	Enables you to add, update, delete, and retrieve the levels of availability that your workers can set for flex teams, and to set the default availability for new Career Hub or Opportunity Marketplace users.
Get Flex Team Categories Put Flex Team Category	Enables you to add, update, delete, and retrieve the categories that are available when creating flex teams.
Get Flex Team Types Put Flex Team Type	Enables you to add, update, delete, and retrieve the flex team types that are available when creating flex teams.
Get Flex Team Endorsements Put Flex Team Endorsements	Enables you to upload and retrieve data for endorsements of flex team members, including specifying which worker is giving the endorsement.

Web Services	Considerations
	Flex team members can receive endorsements after their flex team or role is complete. Endorsements include: • Recommending the worker for other flex teams or not. • Optional public feedback. • Optional skill endorsements. These skills are added to the flex team endorsement but not to the worker's profile. Use the *Manage Skills* web service to add skills for a worker.

Connections and Touchpoints

Features	Considerations
Anytime Feedback	When flex team hosts mark simple or advanced flex teams as complete, they can give anytime feedback to each flex team member.
Interests	Opportunity Marketplace recommends flex teams that can help employees develop their skill interests.
Recruiting	You can enable Opportunity Marketplace to include internal job postings. Note that when browsing all opportunities, the Primary Location facet filter uses the primary location of the job posting. For the best matches, ensure that job profiles, positions, and job requisitions have appropriate titles, descriptions, and skill qualifications.
Learning	You can enable Workday to recommend learning courses to workers when they view their flex team match analysis. Workday recommends learning courses based on the skills required for the flex team that are missing from the worker's profile.
Projects	Workday Projects customers can enable suggested projects in Opportunity Marketplace. Employees can view and express interest in suggested projects from Opportunity Marketplace. Project managers can view interested employees and notify them when opportunities are filled.

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: Skills Cloud on page 1844

Tasks

Steps: Set Up Feedback on page 1737

Steps: Set Up Skills Cloud on page 1852

Reference

2024R2 Release Note: Suggested Skills for Career Hub and Opportunity Marketplace
2025R1 Release Note: Projects in Opportunity Marketplace
2023R2 What's New Post: Gig Roles
2023R2 What's New Post: Gigs Express Interest Notes
2023R1 What's New Post: Gigs Promotion
2023R1 What's New Post: Internal Mobility
The Next Level: Optimizing Gigs with 2023R2+
The Next Level: Talent Optimization Deployment Strategy
The Next Level: Skills-Based Optimization Feature Demonstration
The Next Level: Mastering Flex Teams with PNC

Steps: Set Up Talent Marketplace

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- Set up Skills Cloud.
- Review the setup considerations for Talent Marketplace.
- (Optional) To enable projects in Opportunity Marketplace, set up Projects and resource plans.

Context

With Talent Marketplace, you can:

- Create short- or long-term work assignments called flex teams and quickly identify the right talent for each of them.
- Provide access to Opportunity Marketplace, where workers can discover flex team, job, and project opportunities based on their talent data.

Steps

1. Access the Maintain Functional Areas task.

   Select the Enabled check box for the Talent Marketplace functional area.

   Security: *Security Configuration* domain in the System functional area.

   See Steps: Enable Functional Areas and Security Policies.
2. (Optional) Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.

   On the Innovation Services Opt-In task, select the HCM Machine Learning GA Features on the Available Services tab in the HCM category.

   On the Maintain Innovation Services Data Selection Opt-In task in the HCM: HCM Machine Learning GA Features innovation service, select Talent Marketplace from the View Data Categories for Feature prompt. Select the opt-in check boxes for the categories for which you want to contribute data for Machine Learning.

   As you complete the task, consider:

Option	Description
Worker Profile Data	Required for Talent Marketplace. Enables Workday to extract skills from the relevant sources on a worker: • Job title. • Job description. • Work history. • Explicit skills from the worker profile.
Job Requisition Data	(Optional) Select if your company wants to enable job recommendations in Opportunity Marketplace. To use Opportunity Marketplace, you must opt in to at least 1 of these categories: • Job Requisition Data • Projects Data • Talent Opportunity Marketplace Data
Projects Data	(Optional) Select if your company wants to enable project recommendations in Opportunity Marketplace. To use Opportunity Marketplace, you must opt in to at least 1 of these categories: • Job Requisition Data • Projects Data • Talent Opportunity Marketplace Data
Talent Opportunity Marketplace Data	(Optional) Select to include flex team suggestions and flex team match analysis. To use Opportunity Marketplace, you must opt in to at least 1 of these categories: • Job Requisition Data

Option	Description
	• Projects Data • Talent Opportunity Marketplace Data
Skills Data	(Optional) Select to include tenant data for skills-based matching.
Learning Data	(Optional) Select if your company wants to enable learning recommendations.
Demographics Data	(Optional) Select if your company wants to contribute workforce demographic data. This data is not required to enable product functionality. Workday uses it for machine learning product development, including monitoring and testing for impermissible bias.

3. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality.

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.
4. Access the Maintain Skills and Experience Setup task.

   In the Skills section, select:

   - Enable Workday Skills Cloud
   - Populate Suggested Skills for Workers
   - (Optional) Include Tenanted Skills in Matching

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
5. Configure security for flex teams and Opportunity Marketplace.

   See Steps: Set Up Security for Talent Marketplace on page 1585.
6. (Optional) Edit Business Processes.

   Configure the default definition for the *Project Express Interest* business process. This business process enables workers to express interest in project opportunities.
7. Set up flex teams.

   See Steps: Set Up Flex Teams on page 1589.
8. Access the Edit Tenant Setup - HCM task.

   As you complete the Talent section, consider:

Option	Description
Enabled Opportunities within Opportunity Marketplace	Select opportunities to make available in Opportunity Marketplace. Enable at least one opportunity type. Flex team opportunities are available on the Browse Flex Teams report even when they're not available in Opportunity Marketplace.
Enable Learning within the Opportunity Marketplace	Select the option for Workday to suggest learning courses to employees viewing an opportunity.
Restrict Suggested Jobs to User's Primary Location	Limit suggested jobs to the worker's primary location. Selecting this option restricts suggested jobs to the worker's country,

Option	Description
	designated by the primary location for the worker. For example, if a worker's primary location is San Francisco, the worker will only see suggested jobs with a location in the United States. Enabling this option overrides the Suggested Jobs location options that workers select in Opportunity Marketplace Preferences. Workers can limit suggested jobs by Country, State or Region, or Office. All Locations is the default option.
Enable Flex Teams Express Interest Notes	Select the option to allow workers to create a customized message when expressing interest in a flex team. If enabled, a custom note is not required to express interest. Workers can write a custom note, or leave the message field blank. Disabling the option after a worker has expressed interest with a custom note results in the note being removed from the worker's profile.

Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

9. Access the Maintain Career Hub and Opportunity Marketplace task.

   As you complete the task, consider:

Option	Description
Edit Quick Links	Select Customized Configuration to configure Quick Links for Career Hub and Opportunity Marketplace. The Is Career Hub or Is Opportunity Marketplace options are required for each customized row. Select Task/Report or External Link to add an option that displays in the Quick Links section. Workday saves a Customized Configuration for later use if the Default Configuration is selected.
Edit Browse Filters	Select Customized Configuration to configure filters for enabled opportunity types. The Label Override doesn't impact reporting. Modified labels display only on the Browse page for the applicable opportunity type. Custom labels aren't translatable. Filters available for the Customized Configuration option are only filters supported by the opportunity types.

Option	Description
	Workday saves a Customized Configuration for later use if the Default Configuration is selected.
Edit ML Preferences	Select the Hierarchy to determine the seniority of job posting recommendations provided to workers. Job postings appear in Opportunity Marketplace Suggestions for You, in the Job Openings That Match Your Skills section. Workday suggests jobs consistent with the worker's current grade or level, or 1 grade or level higher, based on the selected hierarchy. Select the Enable ML Suggestion Dismissal option to allow workers to dismiss machine learning flex team suggestions. If this option is enabled, workers see the Remove Suggestion option on a flex team card on the Opportunity Marketplace Suggestions for You page. The Remove Suggestion option is available on both simple and advanced flex teams. When a worker selects Remove Suggestion, they are presented with a confirmation card. Selecting Don't show me this message again prevents the confirmation card from surfacing when removing additional flex team suggestions. Removed flex team suggestions won't appear again on the Suggestions for You page. Workers can search for removed suggestions on the Browse All Opportunities page.

Security: *Set Up: Career Hub and Opportunity Marketplace* in the Career and Development Planning, Career Hub, and Talent Marketplace functional areas.

10. (Optional) Configure projects for display in Opportunity Marketplace.

    When you enable projects in Opportunity Marketplace, employees see up to 9 suggested project roles in the Projects to Work On section. Project details in Opportunity Marketplace include the employee’s other projects and time off during the project. Employees can express interest in these roles, or in roles on the Recommended Projects report.

    - Using the Edit Project Summary task, select Display Project in Opportunity Marketplace for each project that you want to surface in Opportunity Marketplace.

      See Create Projects.
    - Create or edit a resource plan for the project.

      For each resource plan line that you want to display in Opportunity Marketplace, complete the Resource Plan Line section:

Option	Description
Start Date	Less than 1 year ahead of the current date.

Option	Description
End Date	Greater than the current date.
Allocation Type	Select Assign a Worker.
Worker assignments	Either no worker assignments on the resource plan line, at least 1 unnamed resource, or both.
Project Role Requirements	Add skills as project role requirements by: • Selecting *Prompt: Skills* as the Category. • Adding one or more Requirements. Workers receive project suggestions based on the match between their skills and the skills for the role, including skills marked as optional.

See Create Resource Plans.

11. (Optional) Add Jobs Hub tasks to the Opportunity Marketplace Quick Links section.

    Recruiting customers who want their workers to search for and apply to jobs in the context of Opportunity Marketplace can:

    - Access the Maintain Hubs task and configure Jobs Hub. On the Navigation Item Override tab, select Do Not Show for the Navigation Items.
    - Access the Maintain Career Hub and Opportunity Marketplace task. In the Edit Quick Links tab, select Customized Configuration and add the Manage Job Alerts and My Referrals reports for Opportunity Marketplace.
12. (Optional) Configure the Flex Teams and Opportunity Marketplace dashboards as worklets on the Home page.

    See Steps: Set Up Dashboards and Landing Pages.
13. (Optional) Access the Edit Tenant Setup - Notifications task.

    In the Notification Delivery Settings section, on the HCM category, configure notification settings for the Flex Teams and Marketplace Opportunity Promotion on the Notification Type grid.

    Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Related Information

Tasks

Steps: Set Up Jobs Hub on page 372

Steps: Set Up Skills Cloud on page 1852

Reference

2025R1 Release Note: Projects in Opportunity Marketplace

2023R2 What's New Post: Gig Roles

2023R2 What's New Post: Gigs Express Interest Notes

2023R1 What's New Post: Gigs Promotion

2023R1 What's New Post: Internal Mobility

Workday Community: Talent Marketplace AI Fact Sheet

Reference: Impacts of Primary Position Designation on page 889

The Next Level: Mastering Flex Teams with PNC

Steps: Set Up Security for Talent Marketplace

Context

You can set up security to determine who can:

- Access Opportunity Marketplace.
- Set up flex teams.
- Create and manage flex teams.
- Access projects in Opportunity Marketplace.

Note: Workday provides the ability to enable contingent workers to use Flex Teams as a configuration option for use at your discretion. You must always verify any configurations in your tenant and should consult with your own legal counsel to determine if the configurations meet your business and compliance needs.

Steps

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

   Select Domain Security Policy > Enable from the related actions menu of these domain security policies in the Talent Marketplace functional area:

   - *Flex Teams*
   - *Flex Team Worker Data*
   - *Manage: Flex Teams*
   - *Manage: Flex Teams Host Access*
   - *Opportunity Marketplace*
   - *Reports: Flex Teams*
   - *Self-Service: Flex Teams*
   - *Set Up: Flex Teams*
   - *Set Up: Career Hub and Opportunity Marketplace*
   - *Worker Data: Flex Teams*

   To enable projects in Opportunity Marketplace, select Domain Security Policy > Enable from the related actions menu of the *Self-Service: Resource Management* domain security policy in the Projects functional area.

   Security: *Security Activation* and *Security Configuration* domains in the System functional area.
2. Create User-Based Security Groups.

   Create a user-based security group named *Flex Team Administrator* and assign users.

   Note: Workers in the *Flex Team Administrator* security group that are also a member of a flex team do not retain their administrator privileges for that specific flex team.
3. Set Up Assignable Roles.

   As you complete the task, consider:

Option	Description
Role Name	Enter a name for the flex team host role or any other assignable role that you want to create.
Workday Role	Select *Flex Team Host* for the flex team host role. For other assignable roles, you can optionally leave this field blank when you don't want to map to a Workday role.
Enabled For	Select *Flex Team*.
Self-Assign	Select the Self-Assign check box for the flex team host role.

Option	Description
	For other assignable roles, you can optionally leave this check box unchecked.

4. Create Role-Based Security Groups.

   Create constrained and unconstrained role-based security groups for the flex team host role and any other assignable roles that you created.

   As you create a constrained role-based security group, consider:

Option	Description
Access Rights to Organizations	Workday recommends that you select Applies To Current Organization and Unassigned Subordinates.
Access Rights to Multiple Job Workers	Workday recommends that you select Role has access to the positions they support.

5. Edit Domain Security Policies.

   Configure these domains in the Talent Marketplace functional area:

Domain	Example Security Groups	Permission	Considerations
Flex Teams	All Contingent Workers All Employees	Modify	Adding contingent workers to this domain enables them to access and express interest in flex teams.
Flex Team Worker Data	Flex Team Administrator Flex Team Host (Unconstrained)	View	The Flex Team Host (Unconstrained) security group is required for the flex team host to provide skill endorsements to flex team members.
Manage: Flex Teams	Flex Team Administrator Manager	Modify	Also add the role-based security groups that you created for your assignable roles when you want them to view or edit flex teams and flex team membership.
Manage: Flex Teams Host Access	Flex Team Administrator Manager (Unconstrained)	Modify	
Opportunity Marketplace	All Contingent Workers All Employees	Modify	

Domain	Example Security Groups	Permission	Considerations
Reports: Flex Teams	Flex Team Administrator HR Administrator	View	To enable administrators to view flex team report data, grant View permission on these domains: • For the Internal Job Application Rate by Flex Team Membership report: *Candidate Data: Job Applications* in the Recruiting functional area. • For the Internal Movement Rate by Flex Team Membership report: *Worker Data: Historical Staffing Information* in the Staffing functional area.
Self-Service: Flex Teams	Contingent Worker As Self Employee As Self	Modify	Adding contingent workers to this domain enables them to view flex teams that they have expressed interest in or participated in.
Set Up: Flex Teams	Flex Team Administrator	Modify	
Set Up: Career Hub and Opportunity Marketplace	HR Administrator Talent Administrator	Modify	
Worker Data: Flex Teams	Flex Team Administrator	View	

Domain	Example Security Groups	Permission	Considerations
	Flex Team Host		

To enable projects in Opportunity Marketplace, configure the *Self-Service: Resource Management* domain in the Projects functional area:

Domain	Recommended Security Groups	Permission
Self-Service: Resource Management	Employee As Self	View

When you enable new workers to access flex teams, Workday doesn't suggest them as flex team candidates for up to 24 hours, until the match analysis data process updates, on business days only.

6. Edit Business Process Security Policies.

   Configure the security policies for these business processes:

Business Process	Description
Add Flex Team Member	• Add the role-based security groups that you created for your assignable roles to the initiating action when you want to enable them to invite others to join a flex team. • Add security groups to the View All, Approve, and Deny actions to enable them to approve or deny invitations to join flex teams. Workers must have this access to join a flex team.
Manage Flex Team	Add the role-based security groups that you created for your assignable roles to actions on the business process security policy.
Project Express Interest	Add security groups who explore and express interest in resource plan lines for projects, for example, All Employees.

7. Activate Pending Security Policy Changes.

Related Information

Reference

2025R2 Release Note: Flex Teams Support Contingent Workers

2025R1 Release Note: Projects in Opportunity Marketplace

2023R2 What's New Post: Gig Roles

Steps: Set Up Flex Teams

Prerequisites

Review setup considerations for Talent Marketplace. See Setup Considerations: Talent Marketplace.

Review the Innovation Services setup details. See Steps: Set Up Talent Marketplace.

Context

You can set up the Flex Teams application so that administrators and flex team hosts can create temporary work assignments that they can promote to internal candidates. Flex Teams consist of either the simple or advanced team type. Workday uses machine learning to determine which workers have the best skills for each flex team.

To use custom labels throughout Talent, use the Maintain Custom Labels task. Create custom labels to replace the default Workday labels Flex Team and Flex Teams with your organization's terms. Refer to Create Custom Labels for details regarding search terms that don't update after a custom label change.

Steps

1. Access the Create Business Process Definition (Default Definition) task.

   Create and configure default definitions for these business processes in the Talent Marketplace functional area:

   - *Add Flex Team Member*
   - *Manage Flex Team*. When you want to create assignable roles for flex teams, add the *Assign Roles* allowed action on the business process definition.

   Security: *Business Process Administration* and *Manage: Business Process Definitions* domains in the System functional area.
2. (Optional) Set up Enterprise Interface Builder (EIB) integrations for the Flex Teams web service operations.

   See Steps: Set Up EIBs Using Templates from Web Service Operations.
3. (Optional) Create Custom Notifications.

   Configure a custom notification to notify a manager when their direct report initiates the *Manage Flex Team* business process.
4. Access the Maintain Flex Team Availabilities task.

   Configure flex team availabilities and select the default for Career Hub or Opportunity Marketplace onboarding. The Workday-owned flex team availability of *Not Available* is required and is always an option for workers when choosing their availability for flex teams.

   Security: *Set Up: Flex Teams* in the Talent Marketplace functional area.
5. Access the Maintain Flex Team Types task.

   Create flex team types to enable workers to filter flex teams by type in Opportunity Marketplace.

   Security: *Set Up: Flex Teams* in the Talent Marketplace functional area.
6. Access the Maintain Flex Team Categories task.

   Create flex team categories to enable workers to filter flex teams by category in Opportunity Marketplace.

   Security: *Set Up: Flex Teams* in the Talent Marketplace functional area.
7. Add the Manage Flex Teams report to the Career for Worker Profile profile group to display relevant flex teams and worker flex team histories.

   See Steps: Set Up Profiles and Profile Groups.
8. Set up anytime feedback to enable flex team hosts to provide feedback for flex team members.

   See Steps: Set Up Feedback on page 1737.
9. (Optional) Enable express interest notes to allow flex team candidates to add a custom message when expressing interest in a flex team.

   On the Edit Tenant Setup - HCM task, Talent section, select the option to Enable Flex Teams Express Interest Notes.

   Security: *Set Up: Tenant Setup - HCM* in the System functional area.

10. (Optional) Set up additional manager evaluations for performance reviews to enable flex team hosts to add comments to performance reviews for members of their teams. See Steps: Set Up Additional Manager Evaluations on page 1683.
11. (Optional) To enable linking individual goals to flex teams using the Relates To field for a goal, access the Configure Talent Tags task and add *Flex Team* to the Talent Tags for Goals.

    Security: *Set Up: Talent* in the Talent Pipeline functional area.
12. (Optional) Access the Configure Profile Summary task.

    Add the *Flex Teams* card to the Worker Profile.

    See Steps: Set Up Profile Cards.

Result

Users can access:

- The Browse Flex Teams report to view flex team opportunities. This report is available even when you don't enable flex teams for Opportunity Marketplace.
- The Manage Flex Teams report to create and manage flex teams. When a user creates a flex team, Workday automatically assigns them as the flex team host.

On a flex team's manage team page, the flex team host can use the Show Me filter to view interested candidates. From the related actions on the candidate card, flex team hosts can select View Express Interest Note to review the candidate's custom message. When a candidate is added to the flex team, the flex team host can view the interest note on the Flex Teams tab in the Career profile group of the worker's profile.

Next Steps

Enable flex team opportunities for Opportunity Marketplace.

Related Information
Tasks
Create Custom Labels
Steps: Set Up Security for Talent Marketplace on page 1585
Reference
2024R1 What's New Post: Gigs Rebrand to Flex Teams
2023R2 What's New Post: Gig Roles
2023R2 What's New Post: Gigs Express Interest Notes
2023R1 What's New Post: Gigs Promotion
The Next Level: Optimizing Gigs with 2023R2+
Workday Community: Talent Marketplace AI Fact Sheet
The Next Level: Mastering Flex Teams with PNC

Create Flex Teams

Prerequisites

- Configure the Flex Teams application. See Steps: Set Up Flex Teams on page 1589.
- If your organization is using flex teams with Opportunity Marketplace, review the Setup Considerations: Talent Marketplace on page 1569 and Steps: Set Up Talent Marketplace on page 1580 topics.

- Security: These domains in the Talent Marketplace functional area:
  - *Flex Teams*
  - *Flex Team Worker Data*
  - *Manage: Flex Teams Host Access*
  - *Manage: Flex Teams*
  - *Self-Service: Flex Teams*
  - *Set Up: Flex Teams*
  - *Worker Data: Flex Teams*
- Configure the *Add Flex Team Member* and *Manage Flex Team* business processes and security policies in the Talent Marketplace functional area. See: Steps: Set Up Security for Talent Marketplace on page 1585.

Context

You can set up the Flex Teams application so that administrators and flex team hosts can create temporary work assignments they can promote to internal candidates. Workday uses machine learning to determine which workers have the best skills for each flex team.

Steps

1. Access the Create Flex Team task. You can also create a flex team from the Manage Flex Teams report.
2. As you complete the task, consider:

Option	Description
Team Type	Select either: • Advanced Flex Team: A flex team with roles, up to a maximum of 10 per flex team. • Simple Flex Team: A flex team without roles. The Team Type can't be modified once the flex team is created.
Title	Enter a title for the flex team.
Description	Enter a description for the flex team. The description field displays prominently on the flex team details page, and on flex team cards in Opportunity Marketplace and Career Hub.
Deliverables and Milestones	(Optional) Enter deliverables and milestones details. Details can include expectations and due dates.
Start Date	Enter the start date for the flex team. If you're creating an Advanced Flex Team, you can enter different start dates for the roles you create.
End Date	(Optional) Enter the end date for the flex team. Leave the value blank for an ongoing flex team.

Option	Description
Type	(Optional) Select the flex team type. Configure the type options by accessing the Maintain Flex Team Types task.
Display Image	Select a display image for the flex team. The image surfaces on the Manage Flex Teams report and the flex team detail page.
Attachments	(Optional) Upload an attachment to the flex team.

3. The options for the second part of the flex team creation process differ depending on the Team Type selected. As you complete the second part of the task, consider:

Option	Description
Required Skills	Simple Flex Team only. Enter the skills needed for the flex team. Workday uses the skills to find the appropriately skilled workers to staff the flex team.
Role Title	Advanced Flex Team only.
Role Description	Advanced Flex Team only. The Role Description content duplicates the information entered for the flex team. You can enter a description specific to the role or roles.
Skills Needed for Role	Advanced Flex Team only. The explicit skills selected for each role results in improved machine learning recommendations for both flex team hosts and candidates.
Start Date	Advanced Flex Team only. The Start Date field duplicates the value from the flex team Start Date field. You can enter different start dates for the role or roles.
End Date	(Optional) Advanced Flex Team only. The End Date field duplicates the value from the flex team End Date field. You can enter different end dates for the role or roles. Leave the value blank for an ongoing role.
Availability	(Optional) Select the availability option applicable to the flex team or role. Configure the availability options by accessing the Maintain Flex Team Availabilities task.
Number of Workers	(Optional) Enter the number of workers needed for the flex team or role.
Location	(Optional) Enter the location for the flex team or role. Simple flex teams are limited to 1 location. On the Manage Flex Teams report, the flex team's card displays the Multiple Locations attribute if more than 1 location is specified for all roles on an advanced flex team.

Option	Description
Onsite or Remote	(Optional) Select either or both values to indicate where flex team members are expected to spend their time while working.
Category	(Optional) Select the category for the flex team or role. The field is limited to a single value. Configure the category options by accessing the Maintain Flex Team Categories task.
Add Workers	(Optional) Add workers to the flex team or role. Workers receive a task in My Tasks to approve or deny the invitation. Workers are shown as Pending Approval on the flex team until they respond to the invite.

Result

Workday routes the flex team for approval, depending on your *Manage Flex Team* business process configuration.

Example

Rachel, a team leader, is asked to lead a market expansion initiative. This initiative requires skills that the team doesn't currently possess. As a result, Rachel creates an advanced flex team to locate internal talent that can assist her with completing the project. The flex team consists of multiple roles, including a business analyst, a marketing project manager, and a user experience designer. Rachel defines the skills needed for each role.

Bruce, a worker in the company, is contemplating new opportunities to grow within the organization. Bruce is interested in improving upon skills he possesses that aren't utilized in his current roles, but would also like to learn new skills that would contribute to his overall experience.

After creating the advanced flex team, Rachel uses the promote flex team process, with Workday machine learning having provided her with a list of possible candidates for each role. Bruce is notified about the opportunity, and also has the flex team recommended to him in Career Hub. He reviews the flex team description, and expresses interest in the business analyst role.

Rachel reviews the candidate suggestions for each role, as well as the workers who have expressed interest. She staffs each role, and adds Bruce as a team member on the business analyst role. Once the work is completed and the initiative is a success, Rachel completes the skill endorsements and feedback for each worker. Bruce sees the positive feedback on his worker profile, as well as new skills endorsements.

Next Steps

Flex team hosts can access the Manage Flex Teams report to view the advanced and simple flex teams they've created.

Administrators see the Manage All Flex Teams option on the Manage Flex Teams report, enabling them to browse all flex teams, or use the filters to find flex teams that meet their criteria. Users with permissions on the *Set Up: Flex Teams* domain can access the Maintain Flex Team Availabilities, Maintain Flex Team Types, and Maintain Flex Team Categories tasks from this page.

Actions on the flex team card include Manage Flex Team, and Share, View, Edit, and Cancel flex team. Select the flex team card to view the details page.

Access the Manage Flex Team page to:

- View the machine learning candidate recommendations for the flex team. Use the filters to find candidates that meet your criteria. Advanced flex teams have an additional *Role* filter, enabling the host to focus on the suggested candidates for the selected role.
- Promote the flex team or role to all suggested candidates, or those manually selected. Flex team hosts can create a customized notification title and message when promoting their flex team or role.
- Manually Add Worker to the flex team or role. The Add Worker option isn't available if the flex team or role is fully staffed.
- View the flex team or role team. Select the View Team option to add or remove workers.

Administrators and flex team hosts can access the My Flex Team Events report to view the business process details for advanced and simple flex teams.

When a flex team or role has the status of Fully Staffed, or has one approved member, the Complete Flex Team and Complete Role options are available. These options enable the flex team host to enter recommendations, feedback, and endorsements for team members. Additionally:

- Flex team hosts can complete a simple flex team using the flex team's action menu. Advanced flex team roles can be completed individually, with the Complete Flex Team option available on each role from the flex team's detail page.
- The host can close the complete window and return to the process at any time prior to the flex team or role being marked as Completed.
- Submitting feedback and endorsements for the final team member completes that specific flex team or role.
- Submitted feedback and endorsements aren't available for edit.
- Administrators can create a custom notification alerting flex team team members that feedback has been provided. Feedback is available on the worker profile and from the flex team detail page.

Related Information

Reference

2024R1 What's New Post: Gigs Rebrand to Flex Teams

2023R2 What's New Post: Gig Roles

The Next Level: Optimizing Gigs with 2023R2+

Promote Flex Teams

Prerequisites

- Create flex teams and make them available to candidates.
- Security: *Manage: Flex Teams* in the Talent Marketplace functional area.

Context

You can promote to specific candidates, subsets of candidates, or all recommended candidates for a flex team from the Manage Flex Teams page. Recommended candidates surface on a flex team after Workday compares the skills listed on a worker's profile to the skills listed on a flex team as Skills Needed. The result, a Match Analysis, designates the worker as a Fair, Good, or Strong Match.

Steps

1. Access the Manage Flex Teams report.
2. Select Actions > Manage Flex Team on the flex team you want to promote.
3. (Optional) Use the Filters and Additional Filters to refine the list of candidates.
4. Select Promote.
5. Enter text for the title and message fields, or use the Workday-provided defaults.
6. (Optional) Deselect candidates from the promotion.

Result

Candidates receive a notification on their notifications page that contains the custom notification title and message, and the name of the flex team. The notification also includes a link to the flex team.

Next Steps

Administrators and flex team hosts can access the Manage Flex Teams report to manage their flex teams.

Related Information

Concepts

Concept: Notifications

Reference

2024R1 What's New Post: Gigs Rebrand to Flex Teams

2023R2 What's New Post: Gig Roles

2023R1 What's New Post: Gigs Promotion

Reference: Edit Tenant Setup - Notifications

Cancel Flex Teams and Flex Team Roles

Prerequisites

- Create flex teams and make them available to candidates.
- Configure the *Manage Flex Team* business process and security policy in the Talent Marketplace functional area.

Context

Flex teams that have the status of In Recruiting or Fully Staffed are available for cancellation. You can't cancel flex teams with a status of Completed.

The process for canceling flex teams differs depending on the flex team type, simple or advanced.

To cancel a simple flex team, select the Actions menu from either the Manage Flex Teams report, or the flex team detail page. Select the Cancel Flex Team option. The flex team displays with the Canceled status on the Manage Flex Teams report and the flex team detail page.

You cancel the roles on an advanced flex team individually. Follow the steps below to cancel an advanced flex team.

Steps

1. As an administrator or flex team host, access the flex team detail page.
2. The flex team's roles are visible as tabs on the Roles card. Select the role that you want to cancel.
3. Click Cancel Role. The role displays with the Canceled status, and is no longer available to staff.
4. To cancel the advanced flex team, you must cancel all roles following the steps above. Canceling all roles automatically cancels the flex team. The Canceled status displays on the Manage Flex Teams report, and on the flex team detail page.

Next Steps

Administrators and flex team hosts can view the status of their flex teams in the My Flex Team Events report.

Related Information

Reference

2023R2 What's New Post: Gig Roles

The Next Level: Optimizing Gigs with 2023R2+

The Next Level: Skills-Based Optimization Feature Demonstration

Process: Refine Maintained Skills for Talent Marketplace Matching

Prerequisites

Review the following topics:

- Setup Considerations: Skills Cloud, for an overview of Skills Cloud functionality.
- Steps: Set Up Talent Marketplace, to complete the configuration requirements for Talent Marketplace.

Configure these security policies in the Worker Profile and Skills functional area:

- *Manage: External Skills*
- *Set Up: Skills and Experience*

Context

This topic provides a checklist of tasks to clean up your skills data, with the result of improved machine learning skills-based recommendations.

Workday automates a portion of the skills curation and management process by automatically enabling the Duplicate Skills Management and Skill Synonym Management processes for all Skills Cloud customers. These features reduce the number of semantically similar skills by reconciling them to the most standardized form of the skill. This consolidation improves the quality of skills data in your tenant.

Workday recommends waiting a minimum of 2 weeks after the automated jobs have completed in Preview and Production before evaluating your maintained skills, and proceeding with the steps below.

Skills data differs for each tenant. Use the information below as a guide.

Steps

1. Review and refine maintained skills on worker profiles.
    a) In your Production tenant, export all worker skills using the *Get Manage Skills* web service. Filter for maintained skills by referencing the skills reference ID.

       Note: By default, Skills Cloud skills have reference IDs that look similar to "REMOTE_SKILL - xxx".
    b) In your Sandbox or Implementation tenant, inactivate all maintained skills using the *Manage Skills* web service.
    c) In your Sandbox or Implementation tenant, run the *External Skills* web service to load worker maintained skills. This will allow you to see alternative Skills Cloud skill suggestions.

       For more information and configuration steps, see the Import External Skills Community article, and the Talent Web Service Directory.
    d) Review the suggestions and determine the appropriate Skills Cloud skills to replace the applicable maintained skills.
    e) In your Production tenant:

        1. Delete the maintained skills from worker profiles using the *Manage Skills* web service.
        2. Load the applicable Skills Cloud skill replacements on the worker profiles using the *Manage Skills* web service.

       Note: Workday recommends that you test *Manage Skills* web services in your Sandbox or Implementation tenants prior to making changes in Production.

2. Review and refine maintained skills on other Workday objects, including job profiles, job requisitions, learning content, and others.

    - Repeat the steps above using the relevant object's web services.
    - A sample list of associated web services includes:

        - *Get Job Profiles/ Submit Job Profile*
        - *Edit Job Requisition*
        - *Get Learning Course Offerings/Put Learning Course Offering*
3. Determine a cadence for your organization to proactively review and refine maintained skills for workers.
    a) In your Production tenant, export all maintained skills using the *Get Skills* web service.
    b) Review the output of existing maintained skills to determine which to delete or Inactivate.

    Note: Maintained skills can't be deleted, only inactivated, if they're used by other objects. Inactivating a skill prevents users from adding that skill in the future, and allows your organization to retain a history of those skills.
    c) In your Production tenant, delete or inactivate unwanted maintained skills using the *Put Skill* web service.

    Note: Workday recommends that you test *Put* web services in your Sandbox or Implementation tenants prior to making changes in Production.
4. After completing the initial review and refinement of maintained skills, you can include your maintained skills in machine learning driven matching and learning recommendations.

    a. Access the Maintain Skills and Experience Setup task.
    b. Select Include Tenanted Skills in Matching.

    For more information, see Setup Considerations: Skills Cloud and Steps: Set Up Skills Cloud.

Related Information

Concepts

Concept: Automated Skill Management on page 1867

Tasks

Steps: Enable Importing of External Skills on page 1857

Reference

Workday Community: Automatic Duplicate and Synonym Skill Management for All Skills Cloud Customers

Concept: Flex Teams

Flex Teams help you improve collaboration, agility, and internal mobility in your company.

Using Flex Teams, your workers can create and join teams that operate across traditional internal boundaries such as location, function, and reporting structure. Instead, flex team recruitment primarily uses skills. We enable you to connect workers to flex team opportunities that match their skillsets and interests, helping them find new ways to grow their careers and contribute to organizational success.

Flex teams can vary by project length and commitment level, from intensive short-term work like development sprints to ongoing projects like employee resource groups.

Simple and Advanced Flex Teams

There are 2 types of flex teams:

- Simple flex teams have 1 set of requirements for all team members. This type is suited to teams where each member has similar tasks. Simple flex teams have existed since the Flex Teams application has been available to customers, and are still available for organizations that want to continue using their current framework and internal processes.

- Advanced flex teams consist of specific roles, each with its own set of requirements. This team type offers more customization and better machine learning matching for cross-functional teams. For example, the host of an advanced flex team for a video production project can create a presenter role, a director role, and an editor role, each with specific required skills, locations, and time commitments. Advanced flex teams can have up to 10 roles.

Flex team hosts choose the team type when creating the team. They cannot change it after the flex team is approved.

Flex Teams Skills Matching

To help your company staff flex teams, Workday provides machine learning suggestions to hosts, and to workers if Opportunity Marketplace is set up.

Workday uses Skills Cloud machine learning functionality to match workers to flex team opportunities. The match strength is based on the proportion of the worker skills that are an exact match, synonymous with, or similar to the skills on the flex team or flex team role. For more information, see Workday Community: Talent Marketplace AI Fact Sheet.

Note: Note: Worker availability and location do not affect how Workday machine learning matches workers to flex teams. Instead, these options are available as filters for hosts browsing candidates and workers browsing flex teams.

Flex Teams and Opportunity Marketplace

You can implement Flex Teams with Opportunity Marketplace, or on its own. Opportunity Marketplace enables machine learning suggestions for workers looking for flex team opportunities.

Capabilities Implemented	Machine Learning Functionality
Flex Teams only	Flex team hosts can view suggested candidates.
Flex Teams and Opportunity Marketplace	• Flex team hosts can view suggested candidates. • Workers can view suggested flex team opportunities.

Flex Team Hosts

When a worker creates a Flex Team, they become the team's host. From the Manage Flex Teams report, Flex Team hosts can:

- Staff their Flex Team, including viewing suggested candidates, inviting workers to join the team, approving candidates who express interest, removing team members, and promoting their Flex Team to candidates.
- Change the status of their team, including canceling or completing the team.
- Leave feedback for each member of a completed team, including:
    - Whether the host recommends the worker for other Flex Teams.
    - Optional skill endorsements and anytime feedback.

You can also enable Flex Team hosts to contribute to a performance review as an additional manager. For more information, see Steps: Set Up Additional Manager Evaluations on page 1683.

Related Information

Reference

2024R1 What's New Post: Gigs Rebrand to Flex Teams

2023R2 What's New Post: Gig Roles

The Next Level: Mastering Flex Teams with PNC

Reference: Flex Teams Notifications

Flex team candidates and members receive notifications about flex teams in their Workday notifications page. You can also send the notifications by email by accessing the Edit Tenant Setup - Notifications task. In the Notification Delivery Settings > HCM section, you can set up email notifications based on the notification types Flex Teams or Marketplace Opportunity Promotion. All notifications include a link to the flex team.

Flex team hosts can create a customized title and message when promoting a flex team. Workday sends the customized promotion notification to the worker's notifications page. For all other flex team notifications, you can't customize the notification content. Workday populates the notification with data such as:

- Flex team title.
- Flex team status.
- User names.

Flex Teams

Workday sends these notifications to flex team candidates and members:

Description	Example Notification
The flex team host receives a notification when someone expresses interest in their flex team.	Jane Snow is interested in your flex team Machine Learning and Skills.
The flex team host receives a notification when someone removes their interest in their flex team.	Dan Black has removed their interest in your flex team Machine Learning and Skills.
Anyone who has expressed interest in a flex team but isn't a member of the flex team receives a notification when the flex team is fully staffed.	The flex team Machine Learning and Skills has been fully staffed.
Flex team members receive a notification when the flex team host cancels the flex team.	Logan McNeil has cancelled the flex team Machine Learning and Skills.
Flex team members receive a notification when the flex team host completes the flex team. While completing the team, the host has the option to give feedback and skill endorsements.	Congratulations on completing the flex team Machine Learning and Skills. Logan McNeil has given you feedback on your work. Click to view their comments.
Flex team members receive a notification when the flex team host removes them from a flex team.	Logan McNeil has removed you from the flex team Machine Learning and Skills.
The flex team host receives a notification when a flex team member leaves the flex team.	Dan Black has left the flex team Machine Learning and Skills. Machine Learning and Skills status is In Recruiting. You can add another member to your flex team by going to the Manage Flex Team page or remove the open position by editing your flex team.

Marketplace Opportunity Promotion

Workday sends these notifications to flex team candidates and members:

Description	Example Notification
Recommended candidates receive a notification when a flex team host promotes a flex team.	We found a flex team that you might be interested in.

Related Information

Concepts

Concept: Notifications

Reference

2024R1 What's New Post: Gigs Rebrand to Flex Teams

2023R2 What's New Post: Gig Roles

2023R2 What's New Post: Gigs Express Interest Notes

2023R1 What's New Post: Gigs Promotion

Reference: Edit Tenant Setup - Notifications

FAQ: Talent Marketplace

Does location affect how Workday matches candidates to flex teams?	No, location doesn't affect matching.
Does availability affect how Workday matches candidates to flex teams?	No, availability, or expected availability, doesn't affect matching. However, flex team hosts can filter candidates based on the availability they specify they can commit to flex teams.
Who receives flex team promotions and can I control who receives them?	You can send flex team promotions to specific, recommended candidates, subsets of candidates or all recommended candidates, up to 200, unless they set their availability to Not Available. You can only promote your flex team to the same candidates once. When you edit the skills required for a flex team, Workday refreshes the candidate recommendations, and you can promote the flex team again. A worker is a recommended candidate when: • They're a Fair, Good, or Strong Match for the flex team. • They have access to the *Flex Teams* domain. • They're an active worker. Workers who haven't completed onboarding can receive flex team promotions.
Can I opt out of the Flex Team Roles feature? Is there a way to prevent users from creating advanced flex teams?	Currently, there is no way to opt out of the flex team roles feature. However, if you want to restrict your employees from creating advanced flex teams, you can create a condition rule on the *Manage Flex Team* business process. This will trigger a critical warning that will force users to select the Simple Flex Team team type, instead of Advanced Flex Team, during the create flex team process. 1. On the *Manage Flex Team* business process, select the related action on the initiation step. 2. Select Business Process, then Create Condition Rule. 3. Create a description for the rule. 4. Select Team Type for the Source External Field or Condition Rule field.

5. Select in the selection list for the Relational Operator field.
6. Leave the Value specified in this filter option as defaulted in the Comparison Type field.
7. Select Advanced Flex Team in the Comparison Value field.
8. Select OK to create the rule.
9. Return to the *Manage Flex Team* business process. Select the related action on the initiation step.
10. Select Business Process, then Maintain Step Conditions.
11. Select the Effective Date, then OK.
12. Add a row to the Validation Conditions, and enter the rule you created above. To force users to select the Simple Flex Team team type only, select Critical for the Severity.
13. Return to the *Manage Flex Team* business process and confirm that your rule appears in the Validation column. Users who select the Advanced Flex Team team type when creating a flex team will see a critical warning, forcing them to change the Team Type selection from Advanced Flex Team to Simple Flex Team.

If a flex team host moves to another position or is terminated, how do I reassign the flex team host role?	Currently, if a flex team host moves to another position, or is terminated, the flex team they were hosting requires manual reassignment. An administrator completes this process by reassigning the flex team host role. Two possible approaches are: • From the related action on a worker, select Security Profile, then Assign Roles, then Change Assignments. Locate the flex team that requires reassignment by scrolling down the Role Enabled For column. Add or remove assignees as needed. • From the related action on a worker, select Security Profile, then View Role Assignments for Worker Position. Update the flex team host for any flex team using the related action for the applicable flex team and select Roles, then Assign Roles.
How do flex teams search filters work?	Workers can use the Flex Teams Your Company Needs Help With filter to find flex teams that align with the skills on their profile. The Flex Teams to Help You Develop filter helps workers find flex teams based on the skill interests on their profile. Using either filter and Flex Team Host, Flex Team Type, Location or other search facet filters enables workers to refine the list of available flex teams.

Why does Talent Marketplace require Workday Skills Cloud and how are opportunity matches made?	Skills Cloud uses machine learning to provide more relevant and appropriate opportunity recommendations for workers. Skills Cloud matches explicitly defined skills on the worker profile and skills on the opportunity. Skills Cloud also infers related skills that a worker has based on data points from their profile to match them to opportunities.

Career Profile

Setup Considerations: Career Profile

You can use this topic to help make decisions when planning your configuration and use of Career Profile. 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

Career Profile consolidates multiple tasks for managing talent data, enabling users to update their talent profile in a single page. You can configure Career Profile to consolidate the tasks for:

- Awards and activities
- Certifications
- Education
- Interests
- Job history
- Skills
- Work experience

Business Benefits

You can opt in to Career Profile to:

- Make it easier for users to update their talent profile.
- Reduce the number of stand-alone tasks that users need to access.
- Streamline the process of managing talent data.

Use Cases

You can use Career Profile to consolidate tasks that don't require custom workflows or validations.

Questions to Consider

Questions	Considerations
Do you have any business process definitions for any Career Profile sections?	Workday doesn't use custom business processes for Career Profile changes. For active sections, Workday automatically saves any changes made in Career Profile instead of acquiring approvals.

Questions	Considerations
	If you prefer using the stand-alone tasks or custom business processes for a specific section, you can inactivate a section through the Configure Career Profile task.
What happens to in-progress events when I opt in to Career Profile or make a section active?	Workday locks out any fields that have pending changes. Users can't make any changes to locked fields in Career Profile until the business process is complete.

Recommendations

When you first opt in to Career Profile, we recommend you inactivate sections that correspond to business process definitions that you want to keep using.

Requirements

Opt in to Career Profile through the Maintain Feature Opt-Ins report.

Limitations

Active Career Profile sections don't support:

- Custom business process configurations, including approvals, help text, and validation rules.
- Guided tours.

Users can't save their changes for later.

Career Profile is currently not available on mobile devices.

Tenant Setup

You can opt in or out of Career Profile at any time through the Maintain Feature Opt-Ins report. All sections are active the first time you opt in.

The Configure Career Profile task enables you to decide which sections are available. Workday consolidates the add, edit, and remove buttons for most active sections with an Edit button on profile cards and reports.

Security

Domains	Considerations
Set Up: System in the System functional area	Administrators can opt in to Career Profile.
Set Up: Skills and Experience in the Worker Profile and Skills functional area	Administrators can access the Configure Career Profile task to arrange the order of active sections or inactivate sections.
Self-Service: Interests in the Career and Development Planning functional area. These domains in the Worker Profile and Skills functional area: • *Self-Service: Achievements* • *Self-Service: Certifications* • *Self-Service: Education* • *Self-Service: Job History*	Academic affiliates, students, and workers can make changes in the corresponding Career Profile section for themselves.

Domains	Considerations
• *Self-Service: Skill Ratings* • *Self-Service: Skills* • *Self-Service: Work Experience*	
Worker Data: Interests in the Career and Development Planning functional area. These domains in the Worker Profile and Skills functional area: • *Person Data: Achievements* • *Person Data: Certifications* • *Person Data: Education* • *Person Data: Job History* • *Worker Data: Skill Ratings* • *Person Data: Skills* • *Worker Data: Work Experience*	Users with Modify permission can make changes in the corresponding Career Profile section for others.

Business Processes

Workday automatically completes the initiating actions of these business processes if its corresponding section is active in Career Profile:

- *Manage Awards and Activities*
- *Manage Certifications*
- *Manage Education*
- *Manage Interests*
- *Manage Job History*
- *Manage Work Experience*

Reporting

No impact.

Integrations

No impact.

Connections and Touchpoints

Career Profile interacts with these other areas in Workday:

Feature	Considerations
Academic Faculty	Ensure that academic affiliates have access to the correct domains when any of these sections are active: • Award and Activity • Certifications • Education • Job History
Students	Ensure that students have access to the correct domains when any of these sections are active: • Award and Activity

Feature	Considerations
	• Certifications • Job History • Skills

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 Career Profile

Context

Career Profile enables academic affiliates, workers, and students to manage different parts of their talent profile through a single page. You can opt in and configure Career Profile to consolidate tasks for:

- Awards and activities
- Certifications
- Education
- Interests
- Job history
- Skills
- Work experience

Steps

1. Access the Maintain Feature Opt-Ins report.

   Opt in to the Career Profile.

   Security: *Set Up: System* domain in the System functional area.
2. Access the Configure Career Profile task.

   Configure which sections are available in Career Profile and organize the display order of active sections.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

3. Edit Domain Security Policies.

   Assign self-service security groups to the *Self-Service: Interests* domain in the Career and Development Planning functional area and these domains in the Worker Profile and Skills functional area:

   - *Self-Service: Achievements*
   - *Self-Service: Certifications*
   - *Self-Service: Education*
   - *Self-Service: Job History*
   - *Self-Service: Skill Ratings*
   - *Self-Service: Skills*
   - *Self-Service: Work Experience*

   Assign security groups to the *Worker Data: Interests* domain in the Career and Development Planning functional area and these domains in the Worker Profile and Skills functional area:

   - *Person Data: Achievements*
   - *Person Data: Certifications*
   - *Person Data: Education*
   - *Worker Data: Skill Ratings*
   - *Person Data: Skills*
   - *Worker Data: Skills and Experience*
   - *Worker Data: Work Experience*

   See Reference: Security for Career Profile Sections on page 1607.
4. Activate Pending Security Policy Changes.

Result

For active Career Profile sections, Workday:

- Consolidates any corresponding stand-alone add, edit, and remove tasks.
- Consolidates any add, edit, or remove buttons into a single edit button that directs users to the section.
- Doesn't use custom business process security policies and definitions.
- Automatically saves changes made by users when they navigate to another section.

Related Information

Tasks

Steps: Set Up Skills and Experience on page 119

Steps: Set Up Interests on page 1535

Reference

The Next Level: Cultivating Career Mobility

The Next Level: Establishing a Talent Footprint

Reference: Security for Career Profile Sections

Workday secures Career Profile to multiple security domains. When a section is active in Career Profile, users must have Modify permissions on any of the corresponding domains to access that section. Active sections don't use business process security policies or definitions.

For sections that you inactivate in the Configure Career Profile task, Workday continues to use any corresponding business process policies, definitions, and stand-alone tasks.

There's no business process for skills, so the stand-alone Edit Skills task and Career Profile section share the same domain policies.

Use this table to determine which policies to configure based on whether a section is active or not.

Section	Business Process	Domains
Assess My Skills		*Self-Service: Skill Ratings* *Worker Data: Skill Ratings*
Award and Activity	*Manage Awards and Activities*	*Person Data: Achievements* *Self-Service: Achievements*
Certifications	*Manage Certifications*	*Person Data: Certifications* *Self-Service: Certifications*
Education	*Manage Education*	*Person Data: Education* *Self-Service: Education*
Interests	*Manage Interests*	*Self-Service: Interests* *Worker Data: Interests*
Job History	*Manage Job History*	*Person Data: Job History* *Self-Service: Job History*
Skills		*Person Data: Skills* *Self-Service: Skills*
Work Experience	*Manage Work Experience*	*Self-Service: Work Experience* *Worker Data: Work Experience*

Talent Reviews

Steps: Manage Talent Reviews

Context

Talent reviews enable you to gather, evaluate, and report on employee talent information, such as:

- Skills and experiences.
- Performance and potential.
- Career interests and mobility preferences.

You can create multiple talent review templates and customize them for different organizations or purposes. You can prepare for a talent review by printing talent cards with a summary of talent information for each employee.

You can also complete talent reviews using the Workday on iPad and Workday on iPhone apps and seamlessly move between your desktop and mobile device during the process.

Steps

1. (Optional) Determine if your event is large enough that you need to work with the Workday Production Readiness team.

   See Workday Community: Customer Events: Best Practices and Production Readiness for guidelines about opening a Production Readiness case.
2. Set up the individual components that you plan to include in talent reviews:

   - Steps: Set Up Interests on page 1535.
   - Steps: Set Up Skills and Experience on page 119.

3. Create Talent Review Rules on page 1609.
4. Create Talent Review Templates on page 1610.
5. Start Talent Reviews on page 1612.
6. Add Logo to Talent Cards on page 1614.
7. Mass Print Talent Cards on page 1614.

Related Information

Concepts

Concept: Best Practices for All Large-Scale Events

Concept: Talent Reviews on page 1617

Tasks

Add Worklets to Business Processes on page 2969

Create Custom Labels

Reference

Reference: Event-Specific Best Practices

Create Talent Review Rules

Prerequisites

Security: *Set Up: Talent Review* domain in the Talent Pipeline functional area.

Context

Define employee eligibility for talent reviews by creating condition rules that you associate with talent review templates. You can assign the same rule to multiple templates, but each template can have only 1 rule.

Talent review rules evaluate whether employees match the criteria you specify, such as:

- Organization.
- Location.
- Job profile.
- Talent pool membership.

To organize talent review rules, create categories with the Maintain Condition Rule Categories task.

Steps

1. Access the Create Talent Review Rule task.
2. (Optional) Select a rule Category.
3. (Optional) To copy an existing condition, select a rule from the Copy Condition from Rule prompt.
4. In the Rule Conditions grid, build a condition rule that identifies employees who are eligible for a particular talent review.

Example

This condition rule identifies employees whose job profile is Outside Sales and whose location is in the United States:

And/Or	(	Field	Operator	Comparison Type	Comparison Value	)
And	(	Job Profiles	in the selection list	Value specified in this filter	Outside Sales	

And/Or	(	Field	Operator	Comparison Type	Comparison Value	)
And		Location Address - Country	in the selection list	Value specified in this filter	United States	)

Next Steps

- When you create the talent review template, select the rule in the Applies To field.
- To modify a talent review rule, use the Edit Condition Rule task.

Related Information

Tasks

Steps: Manage Talent Reviews on page 1608

Create Talent Review Templates

Prerequisites

Security: *Set Up: Talent Review* and *Talent Review* domains in the Talent Pipeline functional area.

Context

Set guidelines for a talent review by creating a template that defines:

- Who the review is for.
- What type of talent information to capture.
- How to organize the information.
- What employees and managers see when they complete the review.

To add sections to a talent review template, enable the *Talent Review* domain and the subdomain for each section. The subdomains inherit the permissions from the parent domain, which you can override. Example: *Talent Review* and *Talent Review: Competencies*.

Steps

1. Access the Create Talent Review Template task.
2. Click Configure Talent Review Template.
3. (Optional) Click Edit to specify the template audience and purpose:
    a) Click the Applies To prompt to select a rule that identifies the target population for this template.
    b) Enter a Company Statement that provides comments or a message for talent cards.

        This statement only displays on talent cards that you print for talent reviews based on this template.
    c) Click Save.
4. Click Configure Instructional Text to provide instructions for employees and managers or others who use this template.

Option	Description
Welcome Page Instructions	Enter instructions for employees and managers when they begin the talent review, and add a Welcome Page Title that distinguishes this review from other reviews.
Welcome Back Page Instructions	Enter instructions for employees and managers when they return to an in-progress talent

Option	Description
	review. You can also specify a unique Welcome Back Page Title to remind users that this review is in progress.
Summary Editor Page Instructions	Enter instructions for employees and managers to explain the summary editor page. You can also add a Summary Page Title.

If you leave a field blank, then the corresponding section has no instructions on the template for that role. Workday recommends that you provide a Welcome Page Title at a minimum and keep page titles concise for best display.

5. Click Configure Section Order to select and organize the template sections:
   a) Specify a Section Group Title.

      The title can be for a single section or a group of sections.
   b) Select the Display as One Section check box if you want to combine multiple sections into a group.

      With this option, the Guided Editor presents the section group as a single step, rather than as separate steps in the wizard flow. This setting doesn't affect the Summary Editor.
   c) Click the Section prompt to select the first section.
6. Configure each template section:
   a) Click Configure.
   b) Explain how to complete the section by providing Employee Instructions and Manager and Others Instructions.

      These instructions are only for the Guided Editor.
   c) (Competencies only) Select one or more Competencies for this template.

      You can select any number of competencies, but talent cards display a maximum of 8 competencies.

      In talent reviews, employees can only select the competencies configured on the template. They can't pull in competencies from job profiles, management levels, or other sources.
   d) (Languages only) Select the Language Ability Type for this template.

      In talent reviews, employees select their proficiency level for this ability type. If you have only 1 active language ability type, Workday automatically uses that type.
   e) (Talent Summary only) Specify which summary fields to display on the template and whether others can view or edit them.

      If you don't select at least 1 summary field for display, the section is empty.

      The Employee Talent Summary and Manager Summary fields are limited to 250 characters for optimal display on talent cards. The Talent Summary Details field has no character limit and doesn't display on talent cards.
   f) (Combined sections only) Click Configure in the Instructional Text column to provide Employee Instructions and Manager and Others Instructions.

Result

The Errors & Warnings section indicates whether the template is properly configured, including all section requirements and instructional text. Instructional text is optional but recommended.

After you launch a talent review, Workday locks the template to prevent changes. The Status section indicates whether the template is locked and in use, and displays how many talent reviews were initiated on the template. To see a list of in-progress talent reviews, who initiated them, and the initiation date, click the Initiations number.

Next Steps

- Launch the *Talent Review* process.
- Modify or inactivate a talent review template with the Configure Talent Review Template report.

  When a template is Inactive, you can no longer select the template from menu prompts. The template remains valid for in progress or complete talent reviews.

Related Information
Tasks
Steps: Manage Talent Reviews on page 1608

Start Talent Reviews

Prerequisites

- Configure the *Talent Review* business process and security policy in the Talent Pipeline functional area.
- In the Domain Security Policies for Functional Area report, configure the security policy for each section on the talent review template. To determine the appropriate permissions, consider each person's role in the talent review process.
- Security: *Talent Review* domain in the Talent Pipeline functional area.

Context

Launch a talent review for an individual, an organization, or a talent pool. Workday offers several choices to make the process simple and flexible, including 2 options for data entry:

- The Guided Editor is a wizard that takes you through individual steps, with an interactive navigation bar to move between sections.
- The Summary Editor gives you a single-page layout to enter all of your talent information.

Other options help you manage the process workflow. You can:

- Switch between editors at any time by clicking Guide Me or Go to Summary Editor.
- View the most recent comment, the comment history, and the process history at the bottom of the Welcome Page.
- Pause and resume the data entry process as needed.
- Confirm and submit your talent information when data entry is complete.

A worker can have only 1 talent review in progress at a time. If you launch a talent review for an organization, any member who already has a talent review in progress is ineligible for the second talent review. The process only starts for the eligible members of the organization.

Steps

1. Access the appropriate task:

    - Start Talent Review for Organization
    - Start Talent Review for Worker

2. Specify who the review is for and select the template.
    - If the review is for a Supervisory Organization, you can optionally:
        - Include subordinate organizations.
        - Select a calibration program to start simultaneously with this talent review.
    - If the review is for a Talent Pool, you can only select static talent pools, not dynamic pools.
    - If your tenant has fewer than 10,000 workers, Workday displays the worker counts and lists the first 50 eligible workers.
    - When you select a calibration program, Workday uses the rules and dates defined in the review template to determine employee eligibility.
3. (Workers and Managers) Complete the Update Profile task:

    Note: The Update Profile task name is generic to give you more control over the talent review terminology that workers see.

    a) Click the item in the All Items section of My Tasks.
    b) Select either Go to Guided Editor or Go to Summary Editor.
    c) Provide the applicable information in each section.
    d) (Workers) Click Submit when you complete your information.
    e) (Managers) Click Approve, Deny, Send Back, or Close.

        If a manager sends back a review for an employee to complete, much of the skills and experiences information that the manager entered is visible to the employee.

Result

- If you include a calibration program when you start a review, Workday includes the employee's potential assessment from the talent review.
- Managers can access the Talent Review Status Summary report to see key attributes of the talent review process for their team. Managers can take immediate action on assigned tasks. They also can see each employee's current performance rating and most recent potential assessment.

Next Steps

If necessary, you can cancel or rescind individual talent reviews. On a worker profile, click Talent Cards and either:

- Cancel a talent review that has a status of *In Progress*.
- Rescind a talent review that has a status of *Successfully Completed*.

Rescind is the only option to stop talent reviews for organizations and talent pools. Workday automatically starts the review process for every eligible member, completing the launch task event. Access the Mass Rescind Business Processes task.

If a talent review stalls because its participants are unable to complete their assigned tasks, you can manually advance the review. Access the Mass Advance Business Process task or from the related actions menu on the overall process, select Business Process > Advance Manually. You must have permission on the *Manual Advance* action in the *Talent Review* business process security policy.

Note: Workday assigns the *Update My Talent Profile* step to the administrator who advanced the review, not to the original assignee if you send it back after it was manually advanced.

Related Information

Concepts

Concept: Business Process Management

Tasks

Steps: Manage Talent Pools on page 1803

Steps: Manage Talent Reviews on page 1608

Reference

FAQ: Talent Reviews on page 1620

Add Logo to Talent Cards

Prerequisites

Security: *Custom Report Creation* domain in the System functional area.

Context

Add your company logo to the Workday-delivered talent card layout. The logo must be in BMP, GIF, JPEG, or PNG format with a recommended size of 120 x 55.

You can add a different logo for each type of talent card:

- Current talent cards reflect all of a worker's talent data as of the current date.
- Event-based talent cards reflect data from a specific *Talent Review* event.

Note: To add a company statement to event-based talent cards, define the statement on the talent review template.

Steps

1. Access the Configure Business Form Layout task.
2. Select 1 of the talent card layouts:
    - *Talent Card for Profile*
    - *Talent Card for Review*
3. Add a row to the Token Substitution table.
4. Select the logo image and upload it.

Result

Workday includes the company logo at the top right of the printed talent cards.

Related Information

Concepts

Concept: Talent Cards on page 1618

Tasks

Create Talent Review Templates on page 1610

Mass Print Talent Cards

Prerequisites

Security:

- *Self-Service: Talent Card* in the Worker Profile and Skills functional area.
- *Worker Data: Talent Card* in the Worker Profile and Skills functional area.
- *Talent Review* in the Talent Pipeline functional area.

Context

View and print up to 250 talent cards in PDF format with a maximum size of 50MB that include:

- Individual talent cards.
- Mass printed current talent cards for an organization or a talent pool.

- Event-based talent cards for an in-progress or completed *Talent Review* event.

You can add your logo to the delivered talent card layout.

To override the standard print layout, create a custom layout in Workday Studio and add it to your Workday tenant.

Workday names mass-printed talent card PDFs after the processing worker and creation date.

To print individual talent cards, select Talent Cards in the Overview, Career, or Performance profile group, depending on your worker profile configuration.

If you want to display workers' job-related sections when they print their own talent cards, add the Employee As Self and Contingent Worker As Self security groups to the *Self-Service: Current Staffing Information* domain.

Steps

1. Access one of these tasks, depending on the talent cards you want to mass print:

Option	Description
For an Organization	Access the Print Talent Cards for Organization task. Alternatively, from the organization's related actions menu, select Talent > Print Talent Cards.
For a Talent Pool	Access the Print Talent Cards for Talent Pool task. Alternatively, from the talent pool's related actions menu, select Talent > Print Talent Cards.
For a Talent Review Event	Access the Print Talent Cards for Talent Review task.

2. Follow the on-screen prompts to filter and select workers.
3. Select OK or Submit.

Next Steps

- Access the Maintain Work Experience task to specify the Talent Card Sort Order for work experiences.
- To add talent cards to worker profiles, access the Configure Profile and Configure Profile Group tasks. See FAQ: Talent Reviews on page 1620.

Related Information

Concepts

Concept: Talent Cards on page 1618

Concept: Work Experience and Training Types on page 122

Tasks

Steps: Set Up Profiles and Profile Groups

Examples

Add Logo to Talent Cards

Steps: Create Custom Talent Card Layouts

Steps: Create Custom Talent Card Layouts

Prerequisites

- Complete the prerequisites for creating a business form layout.

- Security: *Custom Report Creation* and *Set Up: Tenant Setup - HCM* domains in System functional area.

Context

Create a custom print layout for talent cards. You can create separate layouts for current talent cards and event-based talent cards.

Custom layouts aren't available when you print talent cards from your iPad or iPhone.

Steps

1. Copy each Workday-delivered layout to a custom report:
    a) Access the Copy Standard Report to Custom Report task.
    b) Select the *Talent Card for Worker* report to define the layout for current talent cards.
    c) Rename the report and save it.
    d) On the Share tab, share the report with users who can print talent cards.
    e) Repeat these steps to copy and rename the Talent Card for Review report, which defines the layout for event-based talent cards.
2. Save the report data and XML schema.
    - Select the reports that you created.
    - Specify any values as report parameters.
3. Download the standard layout *rptdesign* files at Workday Community: Talent Card.

    Use the most current version of the *rptdesign* files or your printouts might fail.
4. In Workday Studio, customize the business form layouts to meet your needs.
5. Attach the business form layouts to your custom reports and designate them as the default layouts.
6. Apply the custom layouts to your Workday tenant:
    a) Access the Edit Tenant Setup - HCM task.
    b) From the Talent Card for Talent Review Layout Override prompt, select the print layout for event-based talent cards.
    c) From the Talent Card for Worker Layout Override prompt, select the print layout for current talent cards.

Result

Workday applies the custom layouts to these print tasks:

Layout	Tasks
Talent Card for Talent Review Layout Override	Print Talent Cards for Talent Review Print (for talent cards on worker profiles)
Talent Card for Worker Layout Override	Print Talent Cards for Organization Print Talent Card for Talent Pool View (for talent cards on worker profiles)

Related Information

Concepts

Concept: Creating Business Form Layouts

Tasks

Mass Print Talent Cards on page 1614

Steps: Create a Business Form Layout

Prepare a Custom Report to Be Used with a Business Form Layout

Create a Business Form Layout in Workday Studio
Upload a Business Form Layout and Attach It to a Custom Report

Concept: Talent Reviews

A talent review is a 2-part process that collects talent information from both employees and managers.

Employees describe their:

- Education.
- Career interests.
- Job history.
- Job interests.
- Languages.
- Mobility preferences.

Managers describe their employees':

- Achievable level.
- Loss impact.
- Potential.
- Retention risk.

Both employees and managers add:

- Awards and activities.
- Certifications.
- Competencies.
- Current work experience.
- Development items.
- Free-form talent summary.
- Training.

Talent review templates provide the framework for a talent review. You can create as many talent review templates as you need, with any combination of sections. The template, together with the *Talent Review* business process and your security configuration, determines what actions employees and managers take during a talent review. You can further customize talent review templates by providing multiple instructions for employees and managers to explain the overall process and their role in each section.

This table lists the available sections and who typically completes them:

	Skills and Experience	Career Interests	Talent	Job Data
Employee	• Education • Job History • Languages	• Career Interests • Job Interests • Relocation Preferences • Travel Preferences		
Manager			Employee Potential	
Both	• Awards and Activities • Certifications		• Development Items	

	Skills and Experience	Career Interests	Talent	Job Data
	• Competencies • Current Appointments • Publications • Skills • Training • Work Experience		• Talent Summary	
View Only	Internal Job Profile History		Talent and Performance Details	Job Details

Rules identify the target population for a talent review. You assign a rule to a template during configuration. When you launch the review, Workday sends a My Tasks action to the employees who meet the eligibility criteria defined by the rule.

When a talent review is in progress, a comments toolbar is available at the bottom of the Welcome Page. To enable more effective communication, the comment bar displays:

- The last comment made.
- The comment history.
- The process history.
- Related links.

After you complete a talent review, you can print talent cards to summarize each employee's talent information. Organization leaders can use talent cards for succession planning and to predict workforce needs, identify capability gaps, cultivate leadership, and reward top performers.

Related Information

Concepts

Concept: Talent Cards on page 1618

Tasks

Steps: Manage Talent Reviews on page 1608

Concept: Talent Cards

A talent card is a 1-page summary of a worker's key talent information. You can use talent cards as a tool for discussions on:

- Succession plans.
- Short-term and long-term business plans.
- Retention of top talent.

Talent cards contain this information:

Personal and Job Data	Includes: • Primary business title. • Supervisory organization. • Manager. • Primary position. • Additional jobs. • International assignments. • Location.

	• Job tenure. • Length of service. • Nationality. • Citizenship.
Skills and Experiences	Includes: • Job profile history. • Internal projects. • Work experience. • Job history. • Education. • Certifications. • Languages. • Awards and Activities. • Training.
Talent Summary	Includes: • Assessments (potential, achievable level, retention risk, and loss impact). • Talent matrix placement. • Last performance rating. • Performance over time. • Employee and manager comments. • Succession plans.
Competencies and Career Interests	Includes: • Competency charts (active and archived). • Travel and relocation preferences. • Career interests. • Development items. Competency charts are based on a 5-point scale. If you have more than 5 competency rating values for a proficiency scale, they map to this 5-point scale.

Talent card data is sorted by most recent completion date, with a few exceptions:

- Fluent language always comes first.
- Work experiences are sorted according to the Talent Card Sort Order in the *Maintain Work Experiences* report.
- Degrees are listed according to the Order in the Maintain Degrees task.

The standard talent card layout has 3 areas:

- The header area displays the worker’s name, photo, personal and job data, and talent summary.
- The left side displays the worker’s skills and experiences.
- The right side displays the worker’s competencies, mobility preferences, career interests, and development items.

In addition, your company logo, an optional company statement, and the print date display across the top. You can print talent cards, either individually or in groups. Two versions are available:

- Talent cards that reflect all of a worker's talent information as of the current date.
- Talent cards that reflect a worker's talent information from a specific talent review.

Talent cards based on the current date contain only completed talent information, not in-progress additions or changes. Only current talent cards are available to print from your iPad or iPhone.

Talent cards have an empty section if:

- A worker has no data in that area.
- The section wasn't part of the template from the *Talent Review* event (regardless of whether the relevant data exists in Workday).

Talent cards omit sections altogether if:

- You don't enable the domains to which they belong.
- The user printing the talent card can't access the data.

Example: The talent summary section displays different information for employees and managers, depending on security. Typically, employees only see performance ratings and talent summary comments, while managers also see the employee's:

- Potential.
- Achievable level.
- Retention risk.
- Talent matrix placement.

Optionally, you can replace the Workday-delivered print layout with a custom layout that you set at the tenant level.

Related Information

Tasks

Add Logo to Talent Cards on page 1614
Steps: Create Custom Talent Card Layouts on page 1615
Create Talent Review Templates on page 1610
Mass Print Talent Cards on page 1614

FAQ: Talent Reviews

- General
- Talent Review Templates
- Talent Cards
- Talent Reviews with Calibration

General

Can both employees and contingent workers participate in talent reviews?	Yes, both types of workers can take part in talent reviews. Create a talent review rule that specifies which workers to include in the talent review. Associate the talent review rule with your talent review template. Include the *Contingent Worker as Self* security group in your configuration of the *Talent Review* business process and domain. The Career Interests, Job Interests, Relocation Preferences, and Travel Preferences sections aren't available to contingent workers. Workday hides these sections even if you include them on your talent review template.
Can I load historical talent reviews into Workday?	No, you can't load completed talent review events from another system. However, you can load historical talent data into Workday (including

	skills, experiences, and assessments) using the Enterprise Interface Builder (EIB).
How does information flow between talent reviews and worker profiles?	Workday pulls completed skill and experience information from an employee's worker profile into the talent review when you launch the review. After completing and approving the talent review, the profile displays updated information from the talent review. If the worker removes a skill or experience during the talent review, Workday also removes that information from the profile. During talent reviews, Workday locks talent information in the talent review to prevent changes from other skills and experience business processes. The *Talent Review* business process doesn't launch stand-alone skills and experience business processes.
How can I track talent reviews for my team?	Access the Talent Review Status Summary report to track the status of talent reviews and view completed ratings:

Talent Review	Talent Profile
• The most recent in-progress or completed talent review for each worker on your team. • Click a Review button to complete reviews waiting for your evaluation and approval.	• *Is High Potential* flag if the potential rating is set as *High Potential* on the Maintain Potential task. • The potential rating from the most recently completed *Assess Potential* event for the employee. • The performance rating from the most recently completed performance review for the employee.

Talent Review Templates

Can talent review templates have different security permissions?	No, the same security permissions apply to all talent review templates. To control view and edit access to individual sections, grant different permissions on each of the *Talent Review* subdomains.

Can I provide separate instructions for administrators on talent review templates?	Yes, use the Managers and Others Instructions fields for anyone other than employees. To provide instructions for multiple audiences, use the formatting toolbar to differentiate each set of instructions.
How do I configure competencies?	Use the Configure Competency task to set up competencies in your Workday tenant. Then add the Competencies section to the talent review template and specify which competencies to include on the template. If you want to capture different competencies for different groups of workers, create separate talent review templates for each group. Example: Executives have *Leadership* and *Strategic Vision* as competencies, while sales teams have *Negotiation* and *Presentation Skills*. See Steps: Set Up Skills and Experience on page 119.
Why is the selection list empty for job interests?	Identify which job profiles to make public for browsing and selection. To set up a public job catalog: 1. In the Create Job Profile or Edit Job Profile task, select the Public Job check box to identify a public job. 2. In the Domain Security Policies for Functional Area report, configure security for the *Public Job: View* and *Public Job Qualifications: View* domains. For detailed instructions, see Create a Public Job Catalog on page 1537.
Does Workday deliver a list of schools for the Education section?	Workday provides predefined school data that you can load into your tenant using the Enterprise Interface Builder. Alternatively, you can use the Create School task to set up schools on your own. The Workday school data includes over 19,000 schools in more than 180 countries. During talent reviews, workers can also add schools using free-form text fields in the Education section. Schools added manually are only available to the workers who add them.
Can I change the character limit on the Talent Summary fields?	No, those fields have a 250-character limit to optimize display on talent cards. Add the Talent Summary Details field to your template so that you can capture additional information. The text in this field doesn't display on talent cards.
If my template has warnings about incomplete instructional text, can I still launch a talent review?	Yes, the warnings are just a reminder that instructions are missing and don't prevent you from starting a talent review. Resolve any error

	messages listed at the top of a talent review template before you can launch a review.

Talent Cards

Can I change the layout of talent cards?	Yes, you can override the standard print layout with a custom layout that you create in Workday Studio. You can use 1 layout for all talent cards, or create 1 for current talent cards and 1 for event-based talent cards. See Steps: Create Custom Talent Card Layouts on page 1615. If you keep the standard print layout, you do have control over the content of talent cards from talent review events. The talent cards only include the sections of data that you configured on the talent review template.
Why are some talent card sections empty?	Sections on event-based talent cards are empty if workers don't have information in those areas. Current talent cards reflect a worker's available talent information. In this case, sections are empty if you enable the security domains but the information isn't available. In many cases, security permissions determine whether a section displays on a talent card at all. If you disable the security domain or the person printing the talent card doesn't have permission to view it, that section doesn't display.
How do talent cards sort information?	• Education is sorted by highest degree, based on the Order in the Maintain Degrees task. If a worker has 2 degrees with the same sort order, the most recent degree displays first. • Fluent language precedes other languages. • Workday sorts work experiences based on the Talent Card Sort Order in the Maintain Work Experiences task. • Workday sorts competencies alphabetically with a maximum of 8. • On event-based talent cards, the talent review competency rating comes first, followed by the rating from the next highest competency precedence. Current talent cards display ratings from the 2 highest competency precedences.
Why are some certifications missing from talent cards?	Talent cards exclude expired certifications. However, expired certifications are available in the talent review itself so that employees can update or remove them.
Can I select specific performance reviews to include on talent cards?	No, talent cards always reflect the most recent performance review.

Can I see a preview of my talent card?	Yes, click the print button in the Summary Editor to view a talent card with the current talent review information.
How do I add the Talent Cards tab to worker profiles?	Add the Career content group to the worker profile, then add the Talent Cards report to that group. Worker profiles can also display the Talent Cards report in the Overview or Performance content group. See Steps: Set Up Profiles and Profile Groups.
Can everyone in the management level hierarchy access a worker's talent card?	No, only the worker's direct manager can access the talent card. Others in the management level hierarchy only view the worker's talent card if you add the management chain to the talent card security policy.
Can I print talent cards in other languages?	Yes, Workday prints data and labels on talent cards in the current user's language.
Can I turn off talent cards?	Yes, disable the security policy on these domains: • *Self-Service: Talent Card* • *Worker Data: Talent Card* Note: Talent cards and talent reviews use the same security domains. To remove current talent cards from worker profiles, use the Configure Profile Group task. To turn off talent reviews and event-based talent cards, disable the security policy on the *Talent Review* domain. To remove talent card print tasks from menus and search, use the Hide Workday Delivered Report task. When you hide standard reports, Workday doesn't display them in searches. If you can't find a specific report, access the Hide Workday Delivered Report task to determine if you or another administrator hid it.

Talent Reviews with Calibration

Can I launch talent reviews with calibration?	Yes, you can launch talent reviews with calibration for an organization. When you select a calibration program on the Start Talent Review for Organization task, Workday concurrently launches the calibration program and the talent review.
Is the calibration for the same group of workers as for the talent reviews?	Yes, Workday uses the employee eligibility rules and dates defined in the talent review template instead of the calibration program rules.

How do I set up talent reviews with calibration?	If you have talent reviews and calibration set up for your organization, then talent reviews with calibration don't require any additional configuration.
How does information flow between talent reviews and calibration?	After a talent review with calibration event completes, Workday pulls potential information from the talent review into the calibration program. Configure the calibration program to use the *Potential - Talent Review with Calibration* report field as the default value for potential. After calibration is complete, the employee's worker profile displays the updated potential assessment from the calibration.

Related Information

Tasks

Steps: Manage Talent Reviews on page 1608

Employee Reviews

Common Employee Review Setup

Define Employee Review Types

Prerequisites

Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

You can create different types of employee reviews within the 4 categories of reviews in Workday. You can define as many review types within a review category as you want.

Steps

1. Access the Maintain Review Types task.
2. Provide information for each review type:

Option	Description
Review Type	Workday displays this name in review templates and when you roll out employee reviews.
Initiate on Individual Employee	Enables managers, HR Partners, and other authorized roles to start a review process of this type on a single employee rather than an entire organization.
Allow Employee to Self-Initiate	Enables employees to start their review on their own. This option applies when the Review Category is individual development plan or performance review.

Next Steps

Create employee review templates.

Related Information
Concepts
Concept: Employee Reviews on page 1652
Tasks
Steps: Create Employee Review Templates on page 1627
Steps: Set Up Development Plans on page 1692
Steps: Set Up Disciplinary Actions on page 1695
Steps: Set Up Performance Improvement Plans on page 1699
Steps: Set Up Performance Reviews on page 1679

Create or Edit Review Questions

Prerequisites

Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

You can create categories to organize your employee review questions. Then create an inventory of questions that you can pull into the Questions section in an employee review template.

Steps

1. Create review question categories.
    a) Access the Maintain Review Question Categories task.
    b) Create categories in the grid.
2. Create review questions.
    a) Access the Maintain Review Questions task.
    b) Enter each question in a new row.
    c) Select 1 or more categories for each question.
    d) (Optional) To view more details, drill down on Used in Templates.

Example

You can group questions according to the employee review categories:

- Development Plan
- Disciplinary Action
- Performance Improvement Plan
- Performance Review

Next Steps

- Add questions to an employee review template.

  When you edit review questions, the changes can affect the questions of in-progress reviews. Workday recommends that you don't modify review questions for reviews that are in progress. When you edit review questions, the changes also apply to past employee review templates that used the questions. If you don't want the edited questions to affect in progress or past reviews, create a new review template.
- To see a complete list of categories, run the Review Question Categories report.
- To see a complete list of questions, run the Review Questions report.

Employee Review Templates
Create Employee Review Section Types

Context

To include multiple sections of the same type in an employee review template, create tenanted section types based on these delivered types:

- Accomplishments
- Competencies
- Goals
- Questions
- Responsibilities

You can configure the sections independently on the review template. When you carry over or consolidate content from 1 review to another, Workday only pulls content between sections of the same type. Example: The *Career Goals* section in 1 review only maps to the *Career Goals* section in another review.

Steps

1. Access the Maintain Employee Review Section Types task.
2. Define each section type in a new row:
    a) Enter a Section Type Name.
    b) From the Based on Section Type prompt, select the section type.
    c) Expand Workday Delivered Section Types to view a list of all section types and which review templates use them.

Example

Create different sections for *Career Goals* and *Individual Goals* based on the Goals section type. Add the sections to a review template and select the carryover or consolidate option to move content from 1 review to another: *Career Goals* to *Career Goals*, and *Individual Goals* to *Individual Goals*.

Next Steps

- Add the tenanted section types to employee review templates.
- For a list of tenanted section types, access the View Employee Review Section Types report.

Related Information

Tasks

Steps: Set Up Development Plans on page 1692
Steps: Set Up Disciplinary Actions on page 1695
Steps: Set Up Performance Improvement Plans on page 1699
Steps: Set Up Performance Reviews on page 1679

Steps: Create Employee Review Templates

Prerequisites

- Define employee review types.
- Create employee review section types.
- Create rating scales.
- Create employee review rules.
- Create job profiles.
- Set up the reviews you want to use in your templates.
- Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

You can use the same elements in review templates for development plans, disciplinary actions, performance improvement plans, and performance reviews. Templates define what employees and managers see on the review document and how to process the information. Workday delivers these employee review template sections:

- Accomplishments
- Career
- Competencies
- Development Items
- Feedback
- Goals
- Overall
- Questions
- Responsibilities
- Supporting Documents

You can create up to 14 sections per template.

Steps

1. Access the Create Employee Review Template task.
2. Select the Review Type and specify the template Name.

   The available review types are the types you defined on the Maintain Review Types task.
3. Add sections to the review template and click OK.

   Changing the label in the Section Label Override field affects only this template and the employee reviews generated from this template. Both online and printed review documents have the new labels.
4. Click Configure Employee Review Template.
5. Click Edit to configure the Template Details for the template.

   See Reference: Employee Review Template Details Fields on page 1636.
6. (Optional) Configure the Accomplishments, Questions, and Responsibilities Sections on page 1629.
7. (Optional) Configure the Competencies Section on page 1629.
8. (Optional) Configure the Career Section on page 1630.
9. (Optional) Configure the Feedback Section on page 1630.
10. (Optional) Configure the Goals Section on page 1632.
11. (Optional) Configure the Overall Section on page 1632.
12. Define Help Text for Employee Reviews on page 1647.

Next Steps

- Start employee reviews based on this template.

Related Information

Concepts

Concept: Employee Reviews on page 1652

Concept: Load Content from Previous Review on page 1670

Concept: Object Transporter 2.0

Configure the Accomplishments, Questions, and Responsibilities Sections

Prerequisites

- Create the employee review template.
- Create or edit review questions for the Questions section.
- Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Steps

1. Access the Configure Employee Review Template report and click Configure Sections.
2. Add the Accomplishments, Questions, or Responsibilities section and click Configure Section in the grid.
3. Select the Section Configuration options.

   See Reference: Employee Review Template Section Configuration Fields on page 1637.
4. Select the Item Content options.

   See Reference: Employee Review Template Item Content Fields on page 1638.
5. Add at least 1 question in the Questions section.
6. Select the Ratings and Comments options.

   See Reference: Employee Review Template Ratings and Comments Fields on page 1639.
7. If you selected the Items Rated or Section Rated option, select the Weighting options.

   See Reference: Employee Review Template Weightings Fields on page 1642.

Related Information

Concepts

Concept: Ratings and Weightings on page 1702

Concept: Hide Section Weights and Ratings on page 1703

Tasks

Create or Edit Review Questions on page 1626

Create Rating Scales on page 1644

Examples

Example: Create Employee Reviews with Two Questions Sections on page 1643

Configure the Competencies Section

Prerequisites

- Create the employee review template.
- Create competencies.
- Create the rating scale or the proficiency rating scale.
- Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Steps

1. Access the Configure Employee Review Template report and click Configure Sections.
2. Add the Competencies section and click Configure Section in the grid.
3. Select the Section Configuration options.

   See Reference: Employee Review Template Section Configuration Fields on page 1637.
4. Select the Item Content options.

   See Reference: Employee Review Template Item Content Fields on page 1638.

5. Add at least 1 competency.
6. Select the Ratings and Comments options.

   See Reference: Employee Review Template Ratings and Comments Fields on page 1639.

Related Information

Concepts

Concept: Ratings and Weightings on page 1702
Concept: Hide Section Weights and Ratings on page 1703

Tasks

Create or Edit Competencies on page 125
Create Rating Scales on page 1644
Create Proficiency Rating Scales on page 123
Steps: Configure Additional Reviewers for Competencies on page 1649

Configure the Career Section

Prerequisites

- Set up career interests, job interests, travel, and relocation preferences.
- Create the employee review template.
- Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Steps

1. Access the Configure Employee Review Template report and click Configure Sections.
2. Add the Career section and click Configure Section in the grid.
3. Select the Section Configuration options.

   See Reference: Employee Review Template Section Configuration Fields on page 1637.
4. Select the Section Selection options:
   - Include Career Interest
   - Include Job Interest
   - Include Travel Preferences
   - Include Relocation Preferences

Related Information

Tasks

Set Up Career Interests on page 1538
Set Up Relocation Preferences on page 1540
Set Up Travel Preferences on page 1539

Configure the Feedback Section

Prerequisites

- Set up feedback options for confidentiality and privacy. See Set Up Confidential, Private, and Anonymous Feedback Options.
- Create feedback templates and assign them the *Feedback for Review* type to include them in performance reviews and development plans. See Steps: Configure Feedback Templates.
- Create the employee review template.
- Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Steps

1. Access the Configure Employee Review Template report and click Configure Sections.
2. Add the Feedback section and click Configure Section in the grid.
3. Select the Section Configuration options.

   See Reference: Employee Review Template Section Configuration Fields on page 1637.
4. Select Feedback Types and Dates. As you complete this section, consider:

Option	Description
Anytime Feedback	Enables you to include feedback on a worker given by others in the review (Give Feedback).
Include Role Requested Feedback	Enables you to include feedback on a worker requested by another worker in the review (Get Feedback on Worker). Workday includes confidential feedback, but only to the manager. Workday excludes private feedback.
Include Self Requested Feedback	Enables you to include feedback that workers request on themselves in the review (Get Feedback on Self). Workday excludes private feedback.
Include Skill Endorsements from Feedback	Enables you to include skill endorsements from role-requested and self-requested feedback. Requires Skills Cloud.
Include Skill Ratings from Feedback	Enables you to include skill ratings from role-requested and self-requested feedback. Requires Skills Cloud.
Date Range	Specifies whether to use the review period, enter a dynamic start date, or enter specific dates. Workday requires you select 1 option. When using Guided Experience, Workday doesn't display feedback once the date range ends. For more information, see Concept: Date Range for Feedback in Reviews on page 1635.

   Select at least 1 type of feedback to include in the employee review.
5. (Optional, for performance reviews and development plans only) Select the Default Template for Get Feedback from Review to include questions from a feedback template in the employee review.

   Workday populates this field with feedback templates assigned to the *Feedback for Review* type in the Create Feedback Template task. Workday doesn't use this field if you select only Anytime Feedback for the employee review.

Related Information
Tasks

Steps: Configure Feedback Templates on page 1750
Steps: Set Up Skill Endorsements and Ratings on page 1860

Configure the Goals Section

Prerequisites

- Create the employee review template.
- Create goal payout bands for net attainment.
- Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Steps

1. Access the Configure Employee Review Template report and click Configure Sections.
2. Add the Goals section and click Configure Section in the grid.
3. Select the Section Configuration options.

   See Reference: Employee Review Template Section Configuration Fields on page 1637.
4. Select the Item Content options.

   See Reference: Employee Review Template Item Content Fields on page 1638.
5. Select the Ratings and Comments options.
6. Select the Weighting options:

   - Items Weighted
   - Section Weight

   See Reference: Employee Review Template Weightings Fields on page 1642.
7. (Optional) Select the Net Attainment options. As you complete this section, consider:

Option	Description
Goal Payout Band	Specifies a Payout Band you configured on the Maintain Goal Payout Band task.
Generate Net Attainment	Specifies how to generate net attainment: Workday calculates or manual entry.

   You can generate net attainment in only 1 Goals section in an employee review template.

Related Information

Concepts

Concept: Employee Goals in Employee Reviews on page 1672
Concept: Ratings and Weightings on page 1702
Concept: Hide Section Weights and Ratings on page 1703
Concept: Goal Net Attainment Calculation on page 1654

Tasks

Create Rating Scales on page 1644
Create Goal Payout Bands for Net Attainment on page 1650
Set Up Goals for Employee Reviews on page 1511

Configure the Overall Section

Prerequisites

- Create the employee review template.
- Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Steps

1. Access the Configure Employee Review Template report and click Configure Sections.

2. Add the Overall section and click Configure Section in the grid.
3. Select the Section Configuration options.

   See Reference: Employee Review Template Section Configuration Fields on page 1637.
4. (Optional) Select ratings options for the Overall section that apply to the overall review. As you complete this section, consider:

Option	Description
Rating Configuration	Select from these ratings options: • *Calculated Rating with No Overrides*: Workday calculates the overall rating. The employee or manager can't override this value. Select this option only if you configured 1 or more rated sections other than the Overall section in your review. • *Calculated Rating with Overrides*: Workday calculates the overall rating. The employee or manager can override this value with a new overall rating. Select this option only if you configured 1 or more rated sections other than the Overall section in your review. • *Manual Entry*: The employee or manager specifies their own value in the Rating field rather than selecting a value from a prompt. This value can have up to 2 decimal places and must fall between the specified rating scale. Select this option if your review doesn't have 1 or more rated sections, or you don't want Workday to calculate the overall rating. • *Prompt for Overall Rating*: The employee or manager selects a valid rating from the rating scale. Select this option if your review doesn't have 1 or more rated sections or you don't want Workday to calculate the overall rating.
Require Ratings For	Requires managers or employees to enter ratings in this section. Not available when you select the Calculated Rating with No Overrides or Manual Entry options.
Rating Scale	Uses the default rating scale that you set on the Edit Tenant Setup - HCM task. You can use a different rating scale from the scale used in other sections.
Calculated Rating uses Section Rating Precision	Calculates the overall rating using the Workday-calculated section summary rating values and not the mapped ratings from the rating scale. When you select this check box, Workday recommends that you also select the Display Section Rating check box in other sections.

Option	Description
	You can select either this option or the Calculated Rating uses Item Averaging option but not both.
Calculated Rating uses Item Averaging	Calculates the overall rating using an average rating of all rated items in the employee review. When you select this option, the Section Rated and Section Weight fields aren't available in other sections. You can select either this option or the Calculated Rating uses Section Rating Precision option but not both. If you select no option, Workday uses the weights set at the item or section level. Use the same rating scale across all sections to ensure consistent results. Use the rating scale option for the Competencies section because Workday doesn't include proficiency scales when calculating the average rating.
Show Rating Description	Displays the rating description below the rating.
Show Calculated Rating	Displays the Workday overall calculated rating.
Show Default Rating	Displays the default rating when you select the Calculated Rating with Overrides option in the Rating Configuration field. Clear this check box to hide default ratings in employee reviews.
Allow Employee Ratings	Enables employee ratings by employees. Clear this check box to exclude section ratings by employees in employee reviews.

Related Information

Tasks

Create Rating Scales on page 1644

Examples

Example: Calculating the Overall Rating Using Mapped Section Ratings and Weightings on page 1704
Example: Calculating the Overall Rating Using Calculated Section Ratings and Weightings on page 1705
Example: Calculating the Overall Rating Using Item Averaging on page 1707

Copy Employee Review Templates

Prerequisites

Create 1 or more employee review templates.

Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

Copy an existing employee review template to use as the starting point for another template.

Steps

1. Access the Copy Employee Review Template task.
2. Select the Employee Review Template to Copy.

3. In the Template Name for Copy field, enter the name of the new template.
4. Change the detailed information as necessary.

Next Steps

- Create employee review rules.
- Start employee reviews.

Related Information

Concepts

Concept: Object Transporter 2.0

Concept: Track Employee Reviews on page 1668

Concept: Date Range for Feedback in Reviews

When you configure the Feedback section for employee review templates, the Date Range option you select determines the time frame of feedback that's included in the employee review. The date range that you select only includes the feedback types you select. Example: if you select only Include Role Requested Feedback, Workday won't include any self-requested or anytime feedback received during the date range.

The Date Range options also determine the timing of skill endorsements and skill ratings included in an employee review.

The Feedback Types and Dates section of the Feedback section configuration includes these options:

- Use Review Period
- Enter Dynamic Start Date
- Enter Specific Dates

Use Review Period

When you select this check box, the employee review includes feedback received between the review start and end dates as specified in the employee review template. If you don't specify review period dates in the review template, the review template uses the review period dates you specify when launching the review.

Enter Dynamic Start Date

When you select this check box, the employee review includes feedback received from the specified number of months before the review period end date to the completion date.

Examples:

- When the Review End Date is within 6 months, Workday includes all the feedback of the selected types the worker has received in those 6 months. Example: The Review End Date is March 31 and the last business process steps are also completed on March 31. In this case, Workday only includes the feedback received between October 1, 2022 and March 31, 2023.
- When the review is completed before the Review End Date, any feedback given after the review completion date isn't included. Example: The review is completed on March 15 but the review end date is March 30. In this case, Workday doesn't include any feedback given after March 15.
- When the Review End Date has already passed and today is the review completion date, Workday includes any feedback given before the completion date. Example: If today is April 20, the review end date is March 30, and the review is completed on April 15, then Workday includes only feedback provided between March 30 and April 15.

Enter Specific Dates

When you select this check box, the employee review includes only feedback between the specific start and end dates.

Reference: Employee Review Template Details Fields

Template Details

Option	Description
Applies To	Specifies a condition rule that targets this review template to apply to a subset of employees.
Period Start/End Date	Specifies the start and end dates when all employees have the same review period. These dates display on the initiate review page and you can't change or delete them. When you leave start and end dates blank on the template, you must enter the dates when you launch the review. You can use this option when you start a review for individual employees and must specify the start and end dates at initiation time. These dates also determine which review Workday includes in the Performance Review Status worklet. The review doesn't automatically start or end on these dates. To start a review, use the Start task that corresponds to the type of review you're defining. The review process doesn't end until the business process is complete.
Inactive	Inactivates the template. You can't select an inactive review template, but the template remains valid for in-progress reviews.
Layout Override	Specifies a custom print layout created with Report Designer in Workday Studio to override the standard layout for employee reviews based on this template.

Other Reviewer Options

Option	Description
Enable Additional Reviewers for Competencies Section	(Performance Reviews and Development Plans only) Enables you to add additional reviewers in the Competencies section. Include the *Get Additional Reviewers* step in the *Start Performance Review* or *Start Development Plan* business process to enable additional reviewers. Also define the types of Additional Reviewers on the Maintain Additional Reviewer Types task.
Display Additional Reviewer Names	Enables the additional reviewers' names to be visible to both the employee and the manager. By default, additional reviewer names are anonymous, even if you disable anonymous feedback on the Maintain Feedback Setup task.

Option	Description
Display Additional Ratings to Employee	Enables employees to see ratings assigned by additional reviewers.
Display Additional Comments to Employee	Enables employees to see comments provided by additional reviewers.
Enable Additional Manager Evaluations for All Sections	(Performance reviews only) Enables comments from additional managers in all sections of the employee review.
Display Additional Manager Comments	Enables managers to see other managers' comments if you enable additional manager evaluations.
Display Additional Manager Names	Enables primary managers to see the additional managers' names if you enable additional manager evaluations.

Related Information

Concepts

Concept: Employee Reviews on page 1652

Reference: Employee Review Template Section Configuration Fields

Options	Description
Override Label	(All sections) Renames the section with the text that you specify in the Label field.
Section Comments	(All sections except Overall) Adds a Comment field to this section of the review document. When selected, Workday displays a section summary.
Require Section Comments For	(All sections except Overall) Requires managers, employees, or additional managers to enter comments in this section. In the Competencies section, you can also require additional reviewers to enter comments.
Use Comments	(Overall) Adds a Comment field to the Overall section of the document.
Require Comments For	(Overall) Requires, managers, employees, or additional managers to enter comments in this section.
Additional Reviewer Types	(Competencies) Selects from the additional reviewer types created with the Maintain Additional Reviewer Types task.
Employee View Option	(Accomplishments, Overall, Questions, Responsibilities, Supporting Documents) Determines whether the employee can view or modify this section. Specify 1 of these options: • *View and Modify*: Default behavior. • *View*: Applies to in progress or completed reviews.

Options	Description
	• *View Only on Completed Review*: The employee can't view the section until the review is completed. If you configure all review sections with this option, Workday hides the entire review from the employee until it's completed. • *Hide*: Always hide the section from the employee. If you configure all sections in the review with this option, Workday hides the entire review from the employee. The business process configuration for *Disciplinary Actions* and *Performance Improvement Plans* overrides what employees can view on a template. If any review business process substeps involve the employee (Examples: *Set Content*, *Complete Self Evaluation*), Workday displays the review to employees even if the template has hidden sections.
Rating Configuration	(Overall) See Configure the Overall Section.

Reference: Employee Review Template Item Content Fields

Field	Description
Load Content from Previous Review	Defines the method to move content from an employee review of the same type and within the same review period to the next review period. Options are: • (Accomplishments, Competencies, Goals, Questions, Responsibilities) *Carryover with Item Evaluation Content*: Moves content from the most recently completed review, including ratings and comments as configured. • (Accomplishments, Goals, Responsibilities) *Consolidate*: Consolidates and moves content from all previous reviews that falls within the review period start and end dates. For more information, see Concept: Load Content from Previous Review on page 1670.
Allow Delete of Previous Content	(Accomplishments, Goals, Responsibilities) Enables employees or managers to delete content moved from a previous review. Available when you select an option from the Load Content from Previous Review field.
Allow User to Add Existing Goals Manually	(Goals) Enables the employee or manager to pull in individual goals created outside of the review. If you've included more than 1 Goals section, you can add an individual employee goal to only 1

Field	Description
	section. When you select Load Relevant Goals, Workday automatically selects this check box.
Load Relevant Goals	(Goals) Adds all employee goals not already in the employee review to the review document. The automatic pull-in occurs at the beginning of the set content and evaluation phases. If you've included more than 1 Goals section, you can add employee goals to only 1 section. You can use this option on all Goals section types. You can: • Filter Relevant Goals by Category • Filter Relevant Goals by Goal Template Rule
Populated from Position	(Responsibilities) Adds responsibilities from the employee's primary position and the primary position's job profile. When you select this check box, you can also add new content at the time of the review. Workday pulls the responsibilities from the employee's primary position and the primary position's job profile.
Pull from Position	(Competencies) Adds competencies from the employee's job profile and position to the review. You can also add individual competencies defined with the Configure Competency task.

Reference: Employee Review Template Ratings and Comments Fields

Field	Description
Items Rated	(Accomplishments, Goals, Questions, Responsibilities) Enables the employee or manager to enter a rating for each item during the review process. When selected, enter a beginning and ending range for the rating scale.
Require Item Ratings For	(Accomplishments, Competencies, Goals, Questions, Responsibilities) Requires managers or employees to enter a rating for each item in this section. When you don't set up any conditions, you can require item ratings for the manager for all supported sections. When you select the Allow Employee Ratings check box for the Goals section, you can require employees to rate Goal items. When you select the Allow Employee Ratings check box and select *View and Modify* from the Employee View Option prompt, you can require employee item ratings for the Accomplishments, Questions, and Responsibilities sections. For the Competencies section, when you select the Use Proficiency Scales or Use Rating Scale

Field	Description
	check box, you can require item ratings for managers, employees, or additional reviewers. • When you set no conditions, you can only require item ratings for managers. • When you select the Allow Employee Ratings check box, you can require item ratings for employees. • When you select the Enable Additional Reviewers for Competencies Section template check box, you can require item ratings for additional reviewers.
Use Proficiency Scales	(Competencies) Enables the employee or manager to evaluate competencies using a proficiency scale defined with the Create Proficiency Rating Scale task.
Use Rating Scale	(Competencies) Enables the employee or manager to rate competencies using any tenanted rating scale defined with the Create Rating Scale or Edit Rating Scale task.
Section Rated	(Accomplishments, Competencies, Goals, Questions, Responsibilities) Enables the employee or manager to rate the section. Options are: • *Ratings With Overrides*: Workday displays the Rating field in the review section. If you selected Items Rated, Workday calculates and displays the section rating. You can change this value. If you didn't select Items Rated, you can enter a rating value. • *Ratings With No Overrides*: Workday calculates the rating and displays the value in the Rating field in the review section. You can't change this value. Available only when you select Items Rated. • *Prompt for Rating*: When selected, Workday prompts the reviewer to give the employee a rating for the section independent of the item ratings. Not available when you select Calculated Rating uses Item Averaging for the Overall section. When selected, Workday displays a section summary.
Proficiency Scale for Section Ratings	(Competencies) Selects a proficiency scale for rating the Competencies summary section.
Rating Scale	(Accomplishments, Goals, Questions, Responsibilities) Selects the rating scale for the section. You can set the default rating scale on the Edit Tenant Setup - HCM task. This rating

Field	Description
	scale doesn't need to match the rating scale used in other sections.
Require Section Ratings For	(Accomplishments, Competencies, Goals, Questions, Responsibilities) Requires managers or employees to enter section ratings. This option isn't available if you select the *Ratings With No Overrides* option from the Section Rated prompt. When you set no condition rules, you can only require section ratings for managers. If the Allow Employee Ratings check box is selected, you can require section ratings for employees for the Competencies and Goals sections. When you select the Allow Employee Ratings check box and set the Employee View Option field to *View and Modify*, you can require section ratings for employees for the Accomplishments, Questions, and Responsibilities sections. When you select the Enable Additional Reviewers for Competencies Section template configuration check box, you can require section ratings for additional reviewers for the Competencies section.
Show Rating Description	(Accomplishments, Competencies, Goals, Questions) Displays the description of the selected rating. Define rating descriptions on the Create Rating Scale or Edit Rating Scale task. Define competency rating descriptions on the Create Proficiency Rating Scale or Edit Proficiency Rating Scale task.
Allow Employee Ratings	(Accomplishments, Competencies, Goals, Questions) Enables employee ratings for these sections. Clear this check box to exclude item and section ratings by employees in employee reviews.
Show Calculated Rating Value	(Accomplishments, Competencies, Goals, Questions, Responsibilities) Displays the Workday-calculated summary rating in the section summary area. Available when you select Items Rated and a ratings value in the Section Rated field.
Show Mapped Calculated Section Rating	(Accomplishments, Competencies, Goals, Questions, Responsibilities) Displays the Workday-calculated section summary rating in the employee review document. Available when Section Rated is selected. Workday recommends this option when you select the Calculated Rating uses Section Rating Precision check box in the Overall section.

Field	Description
Item Comments	(Accomplishments, Competencies, Goals, Questions, Responsibilities) Options include: • *All Reviewers*. Enables managers, employees, and additional reviewers (if enabled) to enter comments for each item. • *Exclude Employee*. Enables only managers and additional reviewers (if enabled) to enter comments for each item. • *No Comments*. Excludes comments for the items in the section.
Require Item Comments For	(Accomplishments, Competencies, Goals, Questions, Responsibilities) Requires managers, employees, additional managers, or additional reviewers to enter comments for each item. When you set the Item Comments prompt to *All Reviewers* or *Exclude Employee*, you can require item comments for the manager for all employee review template sections that support this option. When you set the Item Comments prompt to *All Reviewers*, you can require item comments for the employee for the Competencies and Goals template sections. When you set the Item Comments prompt to *All Reviewers* and the Employee View Option prompt is set to *View and Modify*, you can require item comments for the Accomplishments, Questions, and Responsibilities template sections. When you set the Item Comments prompt to *All Reviewers* or *Exclude Employee*, and you select the Enable Additional Manager Evaluations for All Sections check box for template level configuration, you can require item comments for additional managers for all the employee review template sections that support this option. When you set the Item Comments prompt to *All Reviewers* or *Exclude Employee* and you select the Enable Additional Reviewers for Competencies Section check box for template level configuration, you can require item comments for the Competencies template section.

Reference: Employee Review Template Weightings Fields

Field	Description
Items Weighted	(Accomplishments, Competencies, Goals, Questions, Responsibilities) Enables weighting of individual items and identifies how to calculate the rating. Options are:

Field	Description
	• *Weighting Must Total 100*. Weight is calculated by dividing the assigned weight by 100. • *Weighting with No Limits*. Weight is calculated by dividing the assigned weight by the sum of all weights.
Section Weight	(Accomplishments, Competencies, Goals, Questions, Responsibilities) Defines the weight to assign to the section when calculating the overall rating. Available when you select the Show Calculated Rating check box in the Overall section and when you select a value in the Section Rated field in the section. Not available when you select the Calculated Rating uses Item Averaging check box in the Overall section. Workday defines section weights at the template level, not by the employee or manager. When used with the *Weighting with No Limits* option, you can specify the weight up to 12 integer places and 2 decimal places.
Hide Section Weight	(Accomplishments, Competencies, Goals, Questions) Hides section weights in employee reviews. Supported in templates configured to use Guided Experience only.

Example: Create Employee Reviews with Two Questions Sections

This example illustrates how to set up an employee review template with 2 Questions sections so you can customize different questions for employees and managers.

Context

You want to create an employee review template for performance reviews with different sets of questions for employees and managers. This example doesn't include configuration for ratings options or for setting weights for these sections.

Steps

1. Add review question categories using the Maintain Review Question Categories task.
2. Add review questions using the Maintain Review Questions task.
3. Configure the employee review template using the Configure Employee Review Template task.
4. Click Edit and select *Use Guided Experience* in the Default Editor Option field.
5. In the Template Section Configuration section, click Configure Sections.
6. Add the Questions and Questions 2 sections.

7. Configure the Questions section for managers.
    a) Rename the section Questions for Managers in the Label field for clarity.
    b) Select the Section Comments check box to enable managers to enter a comment for this section.
    c) Set the Employee View Option to *Hide* to prevent employees from seeing questions for managers.
    d) Add manager questions to the section from the questions that you created using the Maintain Review Questions task.
    e) Select an option for the *Item Comments* field. Select *Exclude Employee* to prevent employees from entering comments.
    f) Select the *Manager* option in the Require Items Comments For field to require managers to enter comments for this section.
8. Configure the Questions 2 section for employees.
    a) Rename the section Questions for Employees in the Label field for clarity.
    b) Select the Section Comments check box to enable employees and managers to enter a comment for this section.
    c) Set the Employee View Option field to *View and Modify* to enable employees to view and modify questions in this section.
    d) Set the Require Section Comments For field to require managers and employees to provide section comments.
    e) Add employee questions to the section from the questions that you created using the Maintain Review Questions task.
    f) Select an option for the *Item Comments* field. Select *All Reviewers* to enable employees, managers, and additional reviewers to view comments, or select *No Comments* to prevent displaying all comments.
    g) Select the *Manager* or *Employee* options in the Require Items Comments For field to require managers or employees to enter comments for this section.
9. Click Configure Help Text.
    a) In the Template Help Text tab, add template level help text for the *Set Content* step that will be viewed by both employees and managers.
    b) Add separate template level help text for employees and managers in the Employee Evaluation and Manager Evaluation fields.
    c) Add Employee Acknowledgment and Manager Acknowledgment help text.
    d) In the Section Help Text tab, click the Questions section and add help text for managers in the Set Content and Manager Evaluation fields.
    e) Click the Questions 2 section and add help text for employees in the Set Content and Employee Evaluation fields.

Create Rating Scales

Prerequisites

Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

Create rating scales to measure:

- Employee performance.
- Level of proficiency.

You can use rating scales in these sections of employee reviews:

- Accomplishments
- Competencies

- Goals
- Overall
- Questions
- Responsibilities

You can associate different rating scales with different sections in the same template. You can also use rating scales during the review evaluation process.

Steps

1. Access the Create Rating Scale task.
2. Enter a unique Rating Scale Name.
3. As you complete the task, consider:

Option	Description
Rating	Rating values can be alphabetic or numeric. Employees and managers see this value when they complete a review.
Exclude From Calculations	Select this check box to exclude items with this rating from calculations for section ratings or overall ratings.
Rating Value	Enter the value precisely to 2 decimal points. Workday uses this value to calculate the performance rating of the employee.
Begin/End Range	Enter these values with 2 decimal places. If you use ratings and have a section summary or an overall section in employee reviews, these ranges determine which rating value to use. Beginning and ending ranges can't overlap or have gaps. If you enter all zeroes for the Rating Value, Begin Range and End Range fields for more than 1 of the ranges in the scale, then Workday only uses the first rating in the table.
Description	If you select Show Rating Description on a review template, the employee review document displays this description.

Next Steps

- To change the rating scale, use the Edit Rating Scale task.

  If the rating scale is used in a template, you can only update the Display Order, Rating, and Description. You can update all fields for rating scales that aren't in use.

  When you edit a rating scale, the changes can affect the rating calculations of in-progress reviews. Workday recommends you don't modify rating scales used in reviews that are in progress. When you edit a rating scale, the changes also apply to historical ratings for past employee reviews that use that rating scale. If you don't want the edited rating scale to affect past reviews, create a new rating scale.
- To see detailed information for a specific rating scale, run the View Rating Scale report.

Related Information

Tasks

Steps: Set Up Development Plans on page 1692
Steps: Set Up Disciplinary Actions on page 1695
Steps: Set Up Performance Improvement Plans on page 1699
Steps: Set Up Performance Reviews on page 1679

Define Employee Review Rules

Prerequisites

Security: *Set Up: Employee Reviews* domain in Performance Enablement functional area.

Context

Create rules to target an employee review to:

- A specific employee.
- Group of employees.
- Organization.
- Subset of employees in an organization.

The rule is associated with a specific employee review template.

The conditions of the rule define employee eligibility. You can base eligibility on characteristics of workers and positions, such as:

- Job profiles.
- Geographic location.
- Years of service.

Example: You can create a rule that limits participation in a review to only hourly employees.

Steps

1. Access the Create Employee Review Rule task.
2. Enter a rule Description.
3. (Optional) Select a rule Category.
4. To copy an existing condition, select a rule from the Copy Condition from Rule prompt.
5. In the Rule Conditions grid, build a condition rule that identifies workers who are eligible for a particular employee review.

   Employee review rules use Workday condition rules.

Next Steps

- Run the All Condition Rules report to see all employee review rules.
- Run the Employee Review Template Eligibility report to determine whether:
  - The rule selects the correct worker population for review. If the rule retrieves the wrong employees, or excludes eligible employees, change the selection criteria.
  - Multiple templates of the same type target the same workers. You can change the rule to eliminate possible double coverage.

Related Information

Tasks

Steps: Set Up Development Plans on page 1692
Steps: Set Up Disciplinary Actions on page 1695

Steps: Set Up Performance Improvement Plans on page 1699
Steps: Set Up Performance Reviews on page 1679
Create Business Process Condition Rules

Define Help Text for Employee Reviews

Prerequisites

Security: *Set Up: Employee Reviews* in the Performance Enablement functional area or *Manage: Business Process Definitions* domain in the System functional area.

Configure the sections in the employee review template.

Context

You can provide help text for employee reviews in 3 places: at the template level, for a specific section, or for a specific field. In employee reviews, you can define separate help text specifically targeted for employees and managers at the template level and for specific sections.

Template Help Text	Workday displays this help text when workers start or return to these steps of the employee review business process: • *Set Content*. • *Complete Self Evaluation*. • *Complete Manager Evaluation*. • Acknowledgment steps.
Section Help Text	Workday displays section help text at the top of each page.
Field Help Text	Workday displays field help text for individual fields on employee reviews. You can tailor your field help text for these employee review business process steps: • *Complete Additional Manager Evaluation* • *Complete Manager Evaluation* • *Complete Self Evaluation* • *Set Content*

Employee reviews suppress help text defined on steps in the *business process definition*, since you have the flexibility to create template-specific help text.

Steps

1. Access the Configure Employee Review Template report.
2. Click Configure Help Text to define help text for the review.

3. Configure template help text in the Template Help Text tab and section help text in the Section Help Text tab.

   You can enter section-specific instructions for the *Set Content* and *Evaluation* phases of the employee review. Workday only displays sections that you've added to the template in the Section Help Text tab.

   As you complete this task, consider:

Option	Description
Set Content	Employees and managers see these instructions during the *Set Content* step. You can format the text and add links to external information. Not available for the Feedback, Supporting Documents, and Overall sections.
Employee Evaluation	Employees see these instructions during the *Complete Self Evaluation* step. You can format the text and add links to external information.
Manager Evaluation	Managers see these instructions during the *Complete Manager Evaluation* step. You can format the text and add links to external information.
Employee or Manager Acknowledgment	Explain how employees and managers can acknowledge that they've viewed each other's comments as part of the *Provide Manager Review Comments* and *Provide Employee Review Comments* steps. This text is part of a digital signature that includes: • An acknowledgment. • The person who completed the step. • A time stamp.

4. (Optional) Set Up Guided Tours.

   Configure field-level help text for your employee review sections and business process steps.

Related Information

Tasks

Steps: Create Employee Review Templates on page 1627

Reference

2022R2 What's New Post: Employee Reviews

Change Labels on Employee Reviews

Prerequisites

Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

You can change the field labels that display in each section on the employee and manager review to meet your business needs.

Steps

1. Access the Maintain Employee Review Setup task.
2. Enter new labels on the Labels tab.

Result

When you change the label in a section, that change affects all employee reviews that include this section, regardless of the review type.

Related Information

Tasks

Set Up Performance Worklets on page 1687
Steps: Set Up Development Plans on page 1692
Steps: Set Up Disciplinary Actions on page 1695
Steps: Set Up Performance Improvement Plans on page 1699
Steps: Set Up Performance Reviews on page 1679

Steps: Configure Additional Reviewers for Competencies

Prerequisites

Create an employee review template with a Competencies section.

Context

When you create an employee review template, you select which Competencies sections to send for additional review, but not specific competencies within each section. Additional reviewers can rate any or all of the listed competencies. Although Workday uses weighting to calculate results, this information isn't visible to reviewers.

You can include up to 3 additional reviewer types for each Competencies section.

Steps

1. Using the Maintain Additional Reviewer Types task, enter these fields for each reviewer type:
    - Name and ID. The Name is shown as the reviewer type in the *Get Additional Reviewers* subprocess. The reviewer type can represent the work relationship between the reviewer and the subject of the review. Examples are Team Members, Project Lead, Peers, or Direct Report.
    - Description. This type guides the review participants in selecting group members.
2. (Optional) Mark the reviewer type Inactive so it's not available as an option in review templates. To see which review templates use each additional reviewer type, click the Template Usage number. The order of the additional reviewer types controls the order in which they're displayed in the *Get Additional Reviewers* step of the business process.
3. Use the Configure Employee Review Template Section task to configure the review template as follows:
    - Select competencies for review when setting up the review template sections.
    - In the Other Reviewer Options section, select the Enable Additional Reviewers for Competencies Section check box and specify anonymity options.
    - In the Competencies section, select the Additional Reviewers check box in the Section Configuration section. This check box is available only if you selected Enable Additional Reviewers for Competencies Section in the Other Reviewer Options section. The Additional Reviewers types are configured with the Maintain Additional Reviewer Types task.
4. (Optional) Add the *Get Additional Reviewers* subprocess to a development plan or a performance review business process. A common configuration is to launch it in parallel with the self-evaluation step.

Result

Workers can add additional reviewers to Competencies sections in employee review templates.

Note: If an administrator enables the *Talent Effect* option in the leave type for an employee on a Leave of Absence, you can't select this employee as an additional reviewer for the Get Additional Reviewers subprocess.

Related Information

Concepts

Concept: Get Additional Reviewers for Competencies on page 1654

Examples

Example: Employee Initiates Get Additional Reviewers on page 1656

Example: Manager Initiates Get Additional Reviewers on page 1657

Create Goal Payout Bands for Net Attainment

Prerequisites

Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

You can create goal payout bands to use when you create employee review templates and start employee reviews. Workday supports negative numeric values in employee reviews, enabling you to set negative goal targets to track reduction-themed goals and goals that scale below zero.

Steps

1. Access the Maintain Goal Payout Bands task.
2. Select a Calculation Type to determine how Workday calculates net attainment:

Option	Description
Dual Slope	Uses the Minimum Payout Percent, Maximum Payout Percent, and Target Payout Percent.
Single Slope	Uses the Minimum Payout Percent and Maximum Payout Percent.
Target Only	Uses only Target Payout Percent.

The Minimum Payout Percent must be less than or equal to the Target Payout Percent, which must be less than or equal to the Maximum Payout Percent.

Related Information

Concepts

Concept: Goal Net Attainment Calculation on page 1654

Tasks

Steps: Create Employee Review Templates on page 1627

Configure the Goals Section on page 1632

Create Bonus Plans on page 1094

Next Level Presentation: Net Attainment (Talent)

Maintain Employee Review Acknowledgement Statuses

Prerequisites

Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

When employees and managers complete an employee review, you can require them to acknowledge the review and are ready to finalize the review content. The acknowledgement step includes a drop-down status that employees and managers select and a comment field for entering comments. Use employee review acknowledgement statuses if you add the *Provide Employee Review Comments* and *Provide Manager Review Comments* steps in the *Complete Manager Evaluation for Performance Review* and *Complete Manager Evaluation for Disciplinary Action* business processes.

You can specify that an acknowledgement status only applies to employees or managers, or to specific review categories.

Steps

1. Access the Maintain Employee Review Acknowledgement Statuses task.
2. For each status, specify:
    - Order
    - Status
    - Description (for information purposes only)
    - Review Category

      Select 1 or more employee review categories for the status.
    - Action Step

      Select whether the status applies to the *Provide Employee Review Comments* or *Provide Manager Review Comments* action step, or both.

Example

To create an acknowledgement status that's only used by managers in conjunction with a Development Plan, you can create a status called Acknowledge Development Plan with Comments for the Individual Development Plan review category and assign it to the Provide Manager Comments action step. When the *Provide Manager Review Comments* step is run, Workday includes this status for Development Plans and for managers only.

Next Steps

To inactivate a status, access the Maintain Employee Review Acknowledgement Statuses task and select the Inactive check box for that status. When you inactivate a status, it's no longer available for in-process or new reviews. You can reactivate acknowledgement statuses.

Related Information
Tasks
Steps: Set Up Development Plans on page 1692
Steps: Set Up Disciplinary Actions on page 1695
Steps: Set Up Performance Improvement Plans on page 1699
Steps: Set Up Performance Reviews on page 1679

Steps: Create Custom Employee Review Layouts

Prerequisites

Set up business form layouts.

Context

You can create a custom print layout to replace the standard employee review layout. You can also associate different print layouts with specific review templates.

Steps

1. Access the Copy Standard Report to Custom Report task.

   Copy the Employee Review Printout report to a custom report and share it with users who can print employee reviews.

   Security: *Custom/Standard Report Copy* domain in the Tenant Non-Configurable functional area.
2. Prepare a Custom Report to Be Used with a Business Form Layout.

   Save the report data and XML schema for the custom report you created.

   In Step 4, select an employee review with the template layout that you want to modify, specify the current date, and select both the Show Manager Review Content and Show Employee Review Content check boxes.
3. Download the custom review layout.

   The layout is a *.rptdesign* file. See Workday Community: Report Design Files and Configurations: Employee Review.
4. Create a Business Form Layout in Workday Studio.
5. Upload a Business Form Layout and Attach It to a Custom Report.
6. Access the Maintain Employee Review Setup task.

   On the Print Template Overrides tab, apply the print layout to:

   - All employee reviews by selecting the custom report as the Default Tenant Override.
   - Specific review templates by adding rows on the Template Override grid.

   Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Concept: Employee Reviews

The main components of employee reviews in Workday are:

- Review Categories and Types
- Review Templates and Sections

Review Categories and Types

Workday enables you to conduct employee reviews in 4 categories. Each review category can have as many review types within the category as your organization requires.

Note: Workday only generates employee reviews for the employee's primary job.

Review Category	Review Type Examples
Individual Development Plan	Career Development
Performance Review	Ad Hoc Performance Review Annual Focal Review Mid-Year Review
Performance Improvement Plan	Coaching Presentation Skills
Disciplinary Action	Attendance Quality Safety

Review Templates and Sections

Each review type can have different employee review templates that define the look and behavior of the review document. Templates have:

- General details that apply to the employee review as a whole.
- Individual sections that comprise the employee review.
- Instructions that guide employees and managers through the review phases and sections.

You can add these section types to review templates:

- Accomplishments
- Career
- Competencies
- Development Items
- Feedback
- Goals
- Overall
- Questions
- Responsibilities
- Supporting Documents

You can add multiple Accomplishments, Competencies, Goals, Questions, and Responsibilities sections to a template. To create your own sections, use the Maintain Employee Review Section Types task. The maximum number of sections per template is 14.

You specify whether the employee can view or modify these sections:

- Accomplishments
- Overall
- Questions
- Responsibilities
- Supporting Documents

You can hide a section from the employee permanently or until the review is complete.

Related Information
Tasks

Set Up Performance Worklets on page 1687

Embed Related Worklets in Business Processes

Concept: Employee Review Guided Experience Editor

Workday provides the Guided Experience editor for employees to complete information in their employee reviews. The Guided Experience is a wizard that enables employees to navigate between sections.

- The Autosave for Guided Experience Employee Reviews feature is available for the Guided Experience employee review template. The background process runs every 30 seconds for supported Guided Experience employee review sections. The autosave feature isn't available for the *Acknowledgment* or *Review and Submit* steps.
- You can configure separate help text targeted specifically for workers and managers.
- When configured, Workday displays a separate Acknowledgment section after the Summary or Review sections.
- Guided Experience supports hiding section ratings and weightings in Accomplishments, Competencies, Goals, and Questions sections.

Related Information
Reference

2022R2 What's New Post: Employee Reviews

2024R2 Release Note: Autosave for Guided Experience Employee Reviews

Examples

Example: Integrate Career Interests into Guided Experience Employee Reviews

Concept: Get Additional Reviewers for Competencies

The *Get Additional Reviewers* business process enables you to establish a consistent and comprehensive approach for gathering feedback from additional reviewers on a worker's competencies. You can set up employees and contingent workers to serve as additional reviewers.

Set Up Business Processes for Additional Reviewers

You can include the *Get Additional Reviewers* business process as a subprocess on either of these business processes:

- *Start Performance Review*
- *Start Development Plan*

You can't deploy *Get Additional Reviewers* as a stand-alone business process. Depending on configuration, when you initiate it as a subprocess, either the employee or the manager selects the reviewers and reviewer type. Reviewer types are configurable, but typically represent relative roles such as peers and direct reports. The subprocess then contacts the additional reviewers, who can enter comments based on the configuration of Item Comments in the employee review template.

To enable contingent workers to be available as additional reviewers for performance reviews or development plans, configure either of these business process security policies:

- *Complete Additional Reviewer Evaluation for Performance Review*
- *Complete Additional Reviewer Evaluation for Development Plans*

View Additional Reviewer Results in the Manager Evaluation

The *Complete Manager Evaluation* step in the performance review or development plan business process:

- Provides a description of the rated competency section.
- Enables a rating assignment for each competency.

You can drill down to view additional reviewer comments.

Report on Average Additional Reviewer Ratings

You can create a custom report that returns average ratings by additional reviewer type in numeric form. You can create calculated fields for the Review Component business object using the *Average Rating by Additional Reviewer Type* report field.

Related Information

Tasks

Steps: Configure Additional Reviewers for Competencies on page 1649

Concept: Goal Net Attainment Calculation

You can manually calculate goal net attainment for employee reviews, or you can have Workday calculate it using 1 of these methods:

- Target Only
- Single Slope
- Dual Slope

These calculations are for both positive and negative slopes.

Target Only

Workday includes these fields in the calculation:

- Actual
- Target

Calculation: Actual/Target

Single Slope

Workday includes these fields in the calculation:

- Minimum
- Maximum
- Actual

Calculation:

- If Min <= Actual <Max OR Max < Actual <= Min
    - Attainment = Calculated point between Min and Max
- If Min <= Max <= Actual OR Actual <= Max <= Min
    - Attainment = Max %
- Any other case:
    - Attainment = 0%

Dual Slope

Workday includes these fields in the calculation:

- Minimum
- Target
- Maximum
- Actual

Calculation:

- If Min <=Actual <= Target OR Target <= Actual <= Min
    - Attainment = Calculated point between Min and Target
- If Target <= Actual <= Max OR Max < Actual <= Target
    - Attainment = Calculated point between Target and Max
- If Target <= Max <= Actual OR Actual <= Max <= Target
    - Attainment = Max %
- Any other case:
    - Attainment = 0%

Related Information
Tasks
Create Goal Payout Bands for Net Attainment on page 1650
Configure the Goals Section on page 1632
Next Level Presentation: Net Attainment (Talent)

Example: Add My Reviews Report to Custom Dashboards

This example illustrates how to add the My Reviews report to custom dashboards.

Context

Workers can search for the My Reviews report to access their employee reviews. As an HR administrator, you want to add the My Reviews report to a custom dashboard to help workers easily navigate to their employee reviews.

Steps

1. Access the Create Custom Dashboard task.
    a) Create a dashboard called My Reviews - Custom Dashboard.
    b) In the Domains field, select Workday Delivered Domains > Performance Enablement and then select these domains:
        - *Self-Service: Performance Reviews*
        - *Self-Service: Employee Reviews*
    c) In the Dashboard Icon field, select the *Performance Reviews* option.
    d) Click OK.
2. Access the Maintain Dashboards report.
    a) Navigate to the My Reviews - Custom Dashboard dashboard and click Edit.
    b) In the Content tab, click Add.
    c) In the Tab Name field, create the My Reviews - Custom Tab name.
    d) Click the + icon to add a row in the Menu section.
    e) In the Section Label field, create the My Reviews - Custom Section label.
    f) Click the + icon to open the Task prompt.
    g) In the Tasks field, select Create Custom Allowed Worklet Task.
    h) In the Select Task field, select Self-Service: Employee Reviews > My Reviews.
    i) Click OK.
    j) Click Done.

Result

Workers can now access the custom dashboard by selecting Menu > My Reviews - Custom Dashboard.

Related Information

Tasks

Create Custom Dashboards

Example: Employee Initiates Get Additional Reviewers

This setup example enables an employee to initiate the *Get Additional Reviewers* business process as a subprocess for the *Start Performance Review (Default Definition)* business process. The *Get Additional Reviewers* business process is used for the Competencies employee review section only.

Context

Table 3: Start Performance Review (Default Definition)

Order	If	Type	Specify	Optional	Group
A		Initiation		No	
B		Action	Set Review Content	No	Employee as Self
C		Action	Complete Self Evaluation	No	Employee as Self
C	Employee Template Enables Additional Reviewers?	Action	Get Additional Reviewers	Yes	Employee as Self

Order	If	Type	Specify	Optional	Group
D		Action	Complete Manager Evaluation	No	Manager

Example: Manager Initiates Get Additional Reviewers

This setup example enables a manager to initiate the *Get Additional Reviewers for Performance Review (Default Definition)* business process. The *Get Additional Reviewers* business process is used for the Competencies employee review section only.

Context

Table 4: Get Additional Reviewers for Performance Review (Default Definition)

Order	Type	Specify	Optional	Group
A	Initiation		No	
B	Action	Review Get Additional Reviewers	No	Manager
D	Action	Complete Additional Evaluation for Performance Review	No	Employee as Self

Example: Set Up Average Additional Reviewer Ratings Report

This example enables an administrator to set up a report showing the average numeric ratings by additional reviewers for employee reviews measuring competencies.

Context

When you run a report for additional reviewer ratings for competencies, the report displays only the non-numeric rating (Example: Exceeds Expectations) from each additional reviewer. Using the *Average Rating by Additional Reviewer Type* report field on the Review Component business object, you can create a report that calculates the average rating for all additional reviewers into a numeric value.

Steps

1. Access the Create Calculated Field task and create a calculated field on the Review Component business object.

   Select the Lookup Field with Prompts function.
2. Define the calculation using the Average Rating by Additional Review Type source field.

   In the Additional Reviewer Type source field, select 1 of the additional reviewer types configured in your tenant. Example: select from these configured additional reviewer types:

   - Peers
   - Direct Reports
   - Other (for other reviewers)
3. Create additional calculated fields using the instructions in steps 1 and 2.

   Example: if you created a calculated field for Peers in step 2, create a new calculated field for Direct Reports.

   You can also create a calculated field and select all 3 values to calculate an average score of all the values.

4. Access the Create Custom Report task and create a report to display the results for the calculated fields.
    a) Select the *Advanced* option in the Report Type field and the *Employee Review* option in the Data Source field.
    b) In the Columns tab, add a column with the Content - Review Competency business object and the Competency Name in the field so the report will display the average ratings per competency.
    c) Set up the report columns with the business object as Content - Review Competency, with 1 of the calculated source fields you created in steps 2 and 3.
    d) Create the Column Heading Override labels to match the source fields:
        - Average Rating for Peers
        - Average Rating for Direct Reports
        - Average Rating for Other Reviewers
        - Average Rating for All Additional Reviewers
5. In the Prompts tab, select *Review Templates* for the Field column and *Determine default value at runtime* for the Default Type column.
6. In the Output tab, select the Output Type as *Table*.
7. (Optional) Select the Worklet Options option if you want to access the report on a dashboard.
8. In the Share tab, select the Share with all authorized users check box.
9. Run the report for a given worker to display the average competency rating numbers by additional reviewers.

Employee Review Process

Start Employee Reviews

Prerequisites

Configure these business processes and security policies in the Performance Enablement functional area:

- *Start Development Plan*
- *Start Disciplinary Action*
- *Start Performance Improvement Plan*
- *Start Performance Review*

Context

You can start development plans and performance reviews for an entire organization or an individual employee. Disciplinary actions and performance improvement plans are only for individual employees.

Employees can start employee reviews if the Allow Employee to Self-Initiate check box is selected on the Maintain Review Types task for a review type.

Employees can have only 1 employee review template with the same review type and period dates at a time. To start another review for the employee, create a template with a different review type or change the dates for the existing template.

Employee reviews can be performed or accessed by members of the security groups configured on related domains and business process policies, as long as the security groups can access the worker.

You can add worklets to the business process steps to provide relevant analytic information for these tasks.

Sections might be hidden depending upon the section configuration.

Steps

1. Access the appropriate task:

   - Start Development Plan for Employee
   - Start Development Plan for Organization
   - Start My Development Plan
   - Start Disciplinary Action for Employee
   - Start Performance Improvement Plan for Employee
   - Start Performance Review for Employee
   - Start Performance Review for Organization
   - Start My Performance Review

   You can schedule performance reviews and development plans to launch on a selected date and time (once or on a recurring basis). Run the Scheduled Future Processes report to view all scheduled reviews.
2. Specify who the review is for, what template to use, and the review period:
   a) Select the Employee or Organizations.
   b) Select the Review Template.
   c) Specify the Period Start Date and Period End Date.

      If you define the review period on the template, these dates are automatically populated.
   d) (Optional) To start performance reviews with calibration, select the applicable calibration program from the Calibration Program prompt.
      The selected calibration program starts simultaneously. Workday uses the rules and dates defined in the review template to determine employee eligibility.

   Workday sends a notification to the person who is assigned to the next step in the business process.

   When you hide all sections of a review from employees, Workday doesn't send business process notifications to employees as long as employees aren't assigned to any step in the business process. However, if you assign the *Employee as Self* security group to any step in the review business process, the employee receives a blank notification for that step. To avoid sending out notifications to employees when you hide all sections, create a condition rule on the business process using the Includes Editable Sections report field.
3. For the *Set Content* step, complete the sections that apply to your review document.

   If error messages display when you click Save for Later, Workday still saves all your changes. Correct the errors before you can submit the review.

Section	Description
Accomplishments	Describe accomplishments. If Load Content from Previous Review is selected on the template, previous accomplishments display automatically. Descriptions are visible to both employees and managers.
Career	Select different types of job responsibilities that represent career growth, describe career interests, select jobs from the public job catalog, and specify travel and relocation preferences. The available fields depend on template settings.
Competencies	Describe competencies. Items might already exist if Load Content from Previous Review is selected. You can't add new competencies if Pull from Position is selected on the template.

Section	Description
Development Items	When you start an employee review, Workday pulls development items from the worker profile into the review. You can't remove these development items from the review. Select the Use Existing Development Item check box to pull in development items that are added to the worker profile after the review is launched. You can individually select or remove these development items.
Goals	Add a goal or select the Add Existing Goal check box to load an existing goal. You can pull in existing goals only if Allow User to Add Existing Goals Manually is selected on the template. The Pull in Goal prompt lists goals that aren't already part of the review. Items might already exist if Load Content from Previous Review is selected on the template. Additional fields include the goal description, category (if categories are defined), supported organization goals, due date, status, and completion date.
Questions	Questions are defined on the template. Items might already exist if Load Content from Previous Review is selected on the template.
Responsibilities	Describe responsibilities. Items might already exist if Load Content from Previous Review is selected on the template. Descriptions are visible to both employees and managers.

If Items Weighted is checked on the template, you can specify the Weighting of items in the Accomplishments, Competencies, Goals, Questions, and Responsibilities sections.

You can't see the Feedback section in the *Set Content* step.

4. For the *Evaluation* steps, complete the sections that apply to your review document (as described in Step 3). Evaluate items in the Accomplishments, Competencies, Goals, Questions, and Responsibilities sections. (See Step 6 for the Overall evaluation.)

   You can evaluate individual items or entire sections, depending on the template settings. If you carried over items from a previous review, you can view and edit the previous comments and ratings (based on the template settings).

Option	Description
Weighting	Available if Items Weighted is selected on the template.
Rating	Available if Items Rated is selected on the template. The rating scale is defined using the Create Rating Scale or Edit Rating Scale task.
Rating Description	Available if Show Rating Description is selected on the template.
Level (Competencies)	Available if Use Proficiency Scales is selected on the template. The proficiency scale is

Option	Description
	defined using the Create Proficiency Rating Scale task. The effective date of the proficiency scale for a competency in the review is the start of the review. Changes you make to the proficiency scale after you start the review don't impact the competencies in the review.
Behavior (Competencies)	Available if Show Rating Description is selected on the template.
Overall Rating Weight (Summary)	Available if Section Weighted is selected on the template.
Calculated Rating (Summary)	Available if Show Calculated Rating is selected on the template.
Rating (Summary)	Available if Section Rated is selected on the template. The rating scale is defined using the Create Rating Scale or Edit Rating Scale task.
Rating Description (Summary)	Available if Show Rating Description is selected on the template.
Comment (Summary)	Available if Section Comments is selected on the template.

View (and comment on, if configured) the feedback received in the Feedback section. If the *Start Development Plan* or *Start Performance Review* business process includes the *Get Feedback from Review* step, view this feedback in the Feedback section. Drill down on Anytime Feedback and Requested Feedback for more details (available if configured on the template).

In the Competencies section, drill down on Feedback for detailed competency-related feedback.

5. If the review has a Supporting Documents section, click Documents for Review to download and view documents attached to the review template, or click Supporting Documents to browse for and upload additional documents.

   Workday doesn't add these documents to the worker document file. You must have security to view the employee review content before you can view documents uploaded or attached to a review.

   The supported file types are defined using the File Type Setup Instructions field of the Edit Tenant Setup - System task. For more information, see Reference: Edit Tenant Setup - System.
6. If the review has an Overall section, specify overall ratings:

Option	Description
Calibrated Review Rating	Available if the performance review is started with a calibration program.
I want to change the Rating	Available if Calculated Rating with Overrides is selected on the template.
Calculated Rating	Available if Show Calculated Rating is selected on the template.
Default Rating	Displays the overall rating value after the calculated rating is mapped to the rating scale using the beginning and ending ranges of the rating scale.

Option	Description
Rating Description	Available if Show Rating Description is selected on the template.
Comment	Available if Use Comments is selected on the template.

Result

- If you select a calibration program on the Start Performance Review for Organization task:
  - The manager's overall review rating is pulled into the calibration program.
  - The calibrated review displays in the performance review after you complete calibration.
- Once an employee review is in progress, you can only change these items on the template:
  - General description.
  - General and section set content help text.
  - General and section evaluation help text.
  - Section labels.

Next Steps

- Track review status and view results with Workday standard reports in the *Goals and Reviews* and *Talent* categories.
- For performance reviews only:
  - Managers can access the My Team's Performance Reviews report to send back or pull forward an in-progress review.
  - Administrators can manually send back an in-progress or completed review from the related actions menu of the performance review event.
  - Employees can access the My Competency Rating Assessment data visualization report to compare their competency ratings in a specific review. The competency section on a review template must be configured with a minimum of 3 and a maximum of 8 competencies. Also, an administrator must configure a default scale for Default Scale for Competency Assessment (3, 4, or 5 point scale) on the Edit Tenant Setup - HCM task.
- For disciplinary actions and performance improvement plans only, HR partners or administrators can access the Update Employee Review Dates task to:
  - Change the disciplinary action reason and the start and end dates for in-progress or completed disciplinary actions.
  - Change the start and end dates for in-progress or completed performance improvement plans.

Related Information

Concepts

Concept: Track Employee Reviews on page 1668

Concept: Employee Reviews with Calibration on page 1691

Tasks

Add Worklets to Business Processes on page 2969

Steps: Manage Development Plans on page 1694

Steps: Manage Disciplinary Actions on page 1697

Steps: Manage Performance Improvement Plans on page 1702

Steps: Manage Performance Reviews on page 1681

Manage Scheduled Future Processes

Steps: Set Up Assess Potential on page 1773

Create Goal Payout Bands for Net Attainment on page 1650

Pause Employee Review After Set Review Content Step

Context

If you set up an employee review business process to include both *Set Review Content* and evaluation steps, Workday starts employee and manager evaluations as soon as the *Set Review Content* step completes.

You can pause the business process after the *Set Review Content* step and continue at a later date.

Steps

1. Select Business Process > Edit Definition from the related actions menu of one of these employee review business processes:
    - *Start Development Plan*
    - *Start Disciplinary Action*
    - *Start Performance Improvement Plan*
    - *Start Performance Review*
2. Add a new *To Do* step after the *Set Review Content* step.

Result

The person or security group assigned on the *To Do* step can manually launch the evaluation later in the review period.

Print Employee Reviews

Prerequisites

- Configure these applicable business processes and security policies in the Performance Enablement functional area:
    - *Start Performance Review*
    - *Start Development Plan*
    - *Start Performance Improvement Plan*
    - *Start Disciplinary Action*
- Security: *Worker Data: Employee Reviews* domain in the Performance Enablement functional area.

Context

Print an individual in-progress or completed employee review. Printing produces the employee version of the review unless you hide all sections of the review. If you hide individual sections of the review from the employee, Workday hides them in the printed version either unless you hide all sections. If you hide all sections, managers can print the review showing all sections and employee can't print or view their reviews. You can:

- Add the Employee Review Printout step to the *Employee Review* business process.
- Print a review for an individual employee.
- Mass print employee reviews for multiple organizations.
- Schedule performance review printing for an organization.

Steps

1. (Optional) Add the Employee Review Printout step to any of these business processes or subprocesses:
    - *Start Development Plan*
    - *Start Disciplinary Action*
    - *Start Performance Improvement Plan*
    - *Start Performance Review*
2. (Optional) Print a review for an individual employee.
    a) Access the View Printable Employee Review report.

       Security: *Worker Data: Employee Reviews* domain in the Performance Enablement functional area.
    b) Select an employee review.
    c) Click the Print icon.
3. (Optional) Mass print employee reviews for multiple organizations.
    a) Access the Print Employee Reviews for Organization task.

       Security: *Worker Data: Employee Reviews* domain in the Performance Enablement functional area.
    b) On the Organizations prompt, select the organizations for which you want to print reviews. You can select multiple organizations.
    c) Select a review template.
    d) Click OK.

       You can access the Process Monitor report to view the running background process.
4. (Optional) Schedule performance review printing for an organization.
    a) Access the Schedule Print for Employee Reviews task.

       Security: *Process: Employee Reviews* domain in the Performance Enablement functional area.
    b) On the Performance Review Organization Initiation prompt, select the performance review to print.
    c) Complete the Run Once in the Future section to schedule the date and time of the printing.

    You can access review PDFs printed using the Schedule Print for Employee Review task for 180 days if you use the Workday-delivered layout. If you use a custom layout, the review PDFs expire based on the value you configure on theResulting Document Expiration Offset (in days) report field on the business form layout. The maximum value allowed is 25,000.

    You can access the Process Monitor report to view the running background process. Workday makes the PDFs available to workers as a link on the View Printable Employee Review report.

Result

You can access the most recently generated PDF (based on business process security policy) on employee review reports on your worker profile.

Delegated workers can print employee reviews, but only when the delegated task is assigned to them. Delegated workers sign in as the worker, select the print icon to begin the print, and then switch to their primary account. Workday displays the print notification with the link to the PDF on the primary account.

Printed employee review reports aren't accessible on Workday on Android, Workday on iPad, and Workday on iPhone.

Related Information

Concepts

Concept: Printed Employee Reviews on page 1667

Tasks

Steps: Manage Development Plans on page 1694

Steps: Manage Disciplinary Actions on page 1697
Steps: Manage Performance Improvement Plans on page 1702
Steps: Manage Performance Reviews on page 1681

Concept: The Employee Review Process

The employee review process is flexible to meet the needs of your organization and the type of review you're completing.

Saving Employee Reviews

Workday sessions time out when inactive. We automatically saves in progress work for supported steps in employee reviews. The background process for the Autosave For Guided Experience Employee Reviews feature runs every 30 seconds. In addition to the Autosave feature, workers can manually save their work by clicking Save.

Start Review Process

The review process starts with one of these tasks, associated with a configurable business process:

Business Process	Related Task
Start Development Plan	Start Development Plan for Employee Start Development Plan for Organization Start My Development Plan
Start Performance Review	Start Performance Review for Employee Start Performance Review for Organization Start My Performance Review
Start Performance Improvement Plan	Start Performance Improvement Plan for Employee
Start Disciplinary Action	Start Disciplinary Action for Employee

Set Content

This step enables the manager and employee to discuss the content comprising the employee review. Managers and employees can add, edit, or delete:

- Accomplishments
- Career preferences
- Competencies
- Development items
- Goals
- Responsibilities

You can't change questions during the review because they're defined on the template. You can enable weighting for all sections except Career, Development Items, and Feedback.

Get Additional Reviewers

You can use *Get Additional Reviewers* to solicit and receive reviews on competencies. Add it to these business processes:

- *Start Performance Review*.
- *Start Development Plan*.

Employees or managers can initiate *Get Additional Reviewers*.

Get Feedback

Use this step to request feedback from 1 or more employees. You can add the *Get Feedback from Review* step to these business processes:

- *Start Performance Review*.
- *Start Development Plan*.

To view the list of requests and feedback received during the review, configure the Feedback section in the employee review template. Employees can't request feedback on themselves in a review.

Complete Employee Self-Evaluations and Manager Evaluations

Evaluations enable employees to complete their self-assessment and managers to assess their direct reports. They can:

- Add new content.
- View feedback.
- Enter comments.
- Link a goal to the goal of a supervisory organization.
- Provide item ratings.
- Specify an overall rating.

To manage reviews for employees who have multiple managers during a review period (such as during a promotion, transfer, or manager organization change), configure the Manager for Majority of Event security group on all applicable steps in the review business process. If the managers at the midpoint and end of the review period are the same, Workday routes the step to that manager. If not, Workday routes the step to the manager at the start of the review period.

Example: Bob is Tanya's manager at the start of the quarterly review period. If Tanya transfers mid-quarter to Jack's organization, Workday makes Jack the Manager for Majority of Event. If Tanya transfers after the midpoint of the quarter, Workday makes Bob the Manager for Majority of Event.

View Review Details and Submit

The effective date for an employee review is the end date of the review. You can configure each review business process step to control when employees see the review content:

- If the Employee as Self security group has:
  - *View All* access, employees can see review content at any stage of the review process.
  - *View Completed Only* access, employees can see review content after the review end date.

You can also control whether and when employees can view these employee review template sections:

- Accomplishments
- Overall
- Questions
- Responsibilities
- Supporting Documents

Note: The business process configuration for disciplinary actions and performance improvement plans overrides what employees can view on a template. If any employee review business process substeps involve the employee (Examples: *Set Content*, *Complete Self Evaluation*), Workday displays the review to employees even if the template has hidden sections.

Related Information

Concepts

Concept: Employee Goals in Employee Reviews on page 1672

Concept: Get Additional Reviewers for Competencies on page 1654
Concept: Load Content from Previous Review on page 1670

Tasks

Create Custom Business Processes

Reference

Reference: Workday-Delivered Security Groups

Concept: Printed Employee Reviews

You can print the employee version of in-progress, completed, canceled, and rescinded reviews. Workday provides a defined print layout for employee reviews. You can also create your own custom print layout. The Workday-defined employee reviews provide:

- Key employee information.
- The overall evaluation and acknowledgment.
- Any other sections defined on the template in the order they display on the template.

  Note: Workday doesn't include the Supporting Documents section in the employee review printout (PDF), even if you enable section comments for the section. You can print the documents attached to the Supporting Documents section separately.

The acknowledgment section displays the acknowledgment step in the review process.

Generate a Print Document (PDF)

Print a review document using the Print or PDF icons depending on the review editor that you're using.

- If your review uses Guided Experience, generate the review PDF by clicking the Print icon in the left navigation pane. If you click the PDF icon in the section pane, Workday only prints the content of that section.
- If your review uses Guided Editor or Summary Editor, generate the review PDF by clicking the PDF icon.
- You can also generate the review PDF by clicking the PDF icon when you open the review in My Tasks.

Evaluation Content

The print document (PDF) contains content for self-evaluation and manager evaluation based on the current business process step and business process security policy. You must have *View All* permission on these business processes to print all evaluation information:

- *Complete Manager Evaluation*.
- *Complete Self Evaluation*.

Managers can view the self-evaluation content in an employee review printout when:

- They have view permission on the *Complete Self Evaluation* business process security policy.
- Employees submit the self-evaluation.
- The review is in progress or complete.

The printed review contains ratings and comments as configured in the employee review template that it uses.

Hidden Sections

When you configure the employee review template to hide 1 or more sections from the employee, those sections don't display on the review printout.

Feedback

To include the Feedback section in review printouts, include the Feedback section in the review template, plus:

Review Type	Configuration	Result

Performance Review and Development Plan	One of these options:
	• Configure the *Get Feedback from Review* step on the applicable business process:
	  ◦ *Start Performance Review*.
	  ◦ *Start Development Plan*.
	• Select Section Comments for the Feedback section on the Configure Employee Review Template task.
		Prints the feedback received from the review and section comments (if selected).
		The review printout includes only requested feedback received from the employee review as part of the *Get Feedback from Review* process.

Performance Improvement Plan and Disciplinary Action	(Optional) Select Section Comments for the Feedback section on the Configure Employee Review Template task.	Prints the section comments (if selected).

To exclude the Feedback section from employee review printouts, clear the Enable Feedback on Printout check box under Template Details on the Configure Employee Review Template task.

Concept: Track Employee Reviews

If your review is for a single employee, you can track it from the employee's related actions menu: Talent > View Employee Reviews. Workday provides standard reports for a supervisory organization, summarizing information at the organization, team, or template level.

You can also write custom reports that include report fields such as Last Review - Overall Rating and Review - Last Completed. To see the data returned by these fields, you must have 2 types of security permission:

- Access to the *Worker Data: Employee Reviews* domain.
- Access to the *Start Performance Review* and *Complete Manager Evaluation* business processes.

Report	Used By
Average Performance Rating by Supervisory Organization	A specific organization and its subordinates to view: • Average employee performance ratings for each of the last 3 review periods. • Individual employee ratings for each review period. • Details about the calculation for each review period. • Individual employee reviews by selecting Talent > View Employee Reviews from the related actions menu of an employee.

Report	Used By
Employee Review Ratings	One or more organizations and review templates to view the: • Total number of reviews in each rating category. Example: The number of employees with a rating of *Unsatisfactory*, *Needs Improvement*, or *Meets Expectations*. • Average rating by review template and organization. Use this report for review templates that track Overall ratings.
Employee Reviews	One or more organizations and review templates to view: • The overall status of *In Progress* reviews. • The person responsible for the next action or response, such an approval, a comment, or an evaluation. • Both *In Progress* and *Complete* evaluations for a given review cycle and organization.
Employee Review Status Summary	One or more review templates to view: • A list of employees in each status. • Individual employee reviews from the related actions menu of the employee. Note: This report supports dynamic reporting from the total counts.
Employee Review Summary	One or more organizations and review templates to view: • The number of reviews with *Not Started, In Progress*, or *Complete* status. • Detailed information about individual employees in each status. • Individual employee reviews by selecting Talent > View Employee Reviews as a related action on the name of an employee.
Employee Review Template Eligibility	A specific organization and 1 or more review templates to: • View all employees included in a review. • Determine whether employees were targeted for more than 1 review of the same type during the same period. This report only returns information on active workers.
My Team's Performance Reviews	Managers to view: • All in-progress and completed performance reviews for employees, including the review

Report	Used By
	event, manager and employee ratings, and period start and end dates. • The current step of an in-progress review and send it back or pull it forward between evaluation steps.
Performance Ratings Distribution	View a graphical representation of the performance review ratings within a supervisory organization and subordinate organizations.

Related Information

Tasks

Steps: Manage Development Plans on page 1694
Steps: Manage Disciplinary Actions on page 1697
Steps: Manage Performance Improvement Plans on page 1702
Steps: Manage Performance Reviews on page 1681

Concept: Load Content from Previous Review

You can load content from a completed review to a new review in these sections:

- Accomplishments
- Competencies
- Goals
- Questions
- Responsibilities

When configuring sections on the Configure Employee Review Template Section task, select 1 of these Load Content from Previous Review field options:

- Carryover with Item Evaluation Content (all section types)
- Consolidate (Accomplishments, Goals, and Responsibilities only)

You can't move content from an in-progress review. You can continue to work on in-progress reviews (without moving content) when the:

- In-progress review doesn't overlap with the new review period.
- Review templates have different section types.

Content Carryover

Use the Carryover with Item Evaluation Content option to carry over content from an employee's most recent completed review. You can only carry over content into the same review category. Example: You can't carry over Competencies content from a development plan to a performance review. These rules apply when carrying content over from 1 review to another:

General

- The end date of the previous completed review must be earlier than the start date of the new review.
- Workday carries over both review items and evaluation content (employee and manager comments and ratings).
- Once you carry the content over, you can allow employees and managers to add new comments to the existing content and also to change ratings.

Sections

- The previous review and the new review must use the same rating scale. If the review templates have different rating scales, adjust the previous ratings to the rating scale of the new review.

- You can only carry over content to the same section in the new review. Example: You can carry over Competencies content to the Competencies section in the new review, but you can't carry over Competencies content to the Goals section.

Goals

- The status of the content you're moving must be:
  - *Not Started* (NS).
  - *In Progress* (IP).
  - Blank.
- Move the most current version of the content.
- Workday excludes completed goals and archived goals.

Competencies

- Carry over items and comments, but not ratings, if the review templates use different evaluation methods (one uses a rating scale and the other uses proficiency scales).
- Carry over ratings with proficiency scales that use the same scale. Workday doesn't carry over competency proficiency ratings if the scale has changed since the last review.
- Carry over only items defined on the new review template. Workday doesn't carry over competencies pulled from position.

Questions

Carry over only items defined on the new review template.

Responsibilities

The employee or manager must make changes or comment in this section for items to carry over.

Consolidating Content

Use the Consolidate option to pull in items from all completed reviews. These rules apply when consolidating content:

General

The begin and end dates of the previous reviews must be equal to, or fall between, the begin and end dates of the new review.

Sections

- For applicable sections, move ratings and item comments as configured on the new review template.
- Move content from a section in all previous reviews to the same section type in the new review.

Goals

- The status of the content you're moving must be:
  - *Not Started* (NS).
  - *In Progress* (IP).
  - Completed.
  - Blank.
- Move the most current version of the content along with rating values, as configured on the new review template. The Consolidate option doesn't pull in comments in Goals sections.
- The review templates must have the same rating scales for correct mapping of goal ratings between the reviews. If the rating scales are different, Workday randomly assigns an initial rating to goals in the new review.

Related Information

Tasks

Steps: Create Employee Review Templates on page 1627

Concept: Employee Goals in Employee Reviews

You have 2 options when creating employee goals:

- Add them directly to an employee review. Goals created during the employee review process are always visible in the employee review document.
- Create goals outside of the review with the Add Goal to Employees task. You can add these goals to the employee review in 1 of these ways:
  - Manually select and add these goals.
  - Set up Workday to add these goals automatically.

You can't add goals that are pending approval to reviews if you enabled Lock Goals Associated with In Progress Reviews in the Maintain Goal Setup task.

On the Create Employee Review Template task, add a Goals section, and configure it in 1 of these ways:

Option	When You Start the Review
Load Content from Previous Review. Select from: • *Carryover with Item Evaluation Content*. • *Consolidate*.	Workday moves the most current version of the employee goal within the same section. The current review template settings determine the previous ratings and comments that you see. For more information, see Concept: Load Content from Previous Review on page 1670.
Allow User to Add Existing Goals Manually.	You can add a goal or select a goal from the Pull in Goal prompt during the *Set Content* and *Evaluation* steps. You can't add goals associated with in-progress reviews to the same worker.
Load Relevant Goals. (Optional) To filter relevant goals, select from: • *Filter Relevant Goals by Category*. • *Filter Relevant Goals by Goal Template Rule*.	Workday automatically loads goals at these 2 points in the review process: • Beginning of the *Set Content* phase • Beginning of the *Evaluation* phase.

On these options, Workday records all goal attributes but displays only the attributes you enable on the Maintain Goal Setup task:

- Carryover
- Consolidate
- Pull In Goal
- Load Relevant Goals

Allow User to Add Existing Goals Manually

The selection list includes goals that are:

- Added in all types of employee reviews and those added using the Add Goal to Employees task.
- Not already in the review.
- The most current version with any completion status.
- Not archived.

Load Relevant Goals

When you select Load Relevant Goals, you can optionally filter goals by category or by template rule. Regardless of whether you filter goals, Workday doesn't load goals associated with a previous review.

When you load goals but don't select a filter option, Workday loads goals that are:

- Created using the Add Goal to Employees task.
- Not already in this review or another review.
- The most current version (excluding in-progress changes) with any completion status except *Not Applicable*. For more information, see Set Up Goal Completion Statuses on page 1514.
- Due during the employee review start and end dates. If a goal has no due date, Workday adds goals created between the review start and end dates.
- Completed between the start and end dates of the employee review.
- Not archived.

When you load goals by category, Workday loads goals in the categories you select.

When you load goals by template rule, Workday loads goals using the above criteria that:

- Satisfy the goal template rule.
- Are active (not deleted or archived).
- Aren't associated with another in-progress review.

A goal can only be in 1 section at a time. When you configure more than 1 Goals section to load goals by the same or overlapping rule, Workday loads goals based on your configured section order.

When you use *Carryover with Item Evaluation Content* or *Consolidate* with Filter Relevant Goals by Goal Template Rule and Filter Relevant Goals by Category, Workday loads goals first by the Carryover or Consolidate criteria, then adds goals that satisfy the goal template rule.

If you make changes to a goal in an employee review, and make changes outside of the review (ad hoc goal management), Workday only displays the last set of changes for completed goals that have been made or approved. Workday doesn't display pending changes, such as goals awaiting approval.

You can view all goal changes in the:

- History section of the View Goal report.
- View Worker History by Category report on worker profiles.

Related Information

Tasks

Steps: Create Employee Review Templates on page 1627

Create or Edit Individual Goals on page 1518

Set Up Goals for Employee Reviews on page 1511

Concept: Route Review Steps for Workers with Additional Positions

For workers with multiple positions, you can route employee review business process steps to the worker's primary position manager or to the worker's additional position manager. Example: When a worker is on an international assignment, you can route business process steps to the worker's host country manager instead of the worker's home country manager.

You can configure routing modifiers for these steps when you edit the *Start Performance Review* business process definition:

- *Assess Potential*
- *Complete Manager Evaluation*
- *Complete Self Evaluation*
- *Get Additional Manager Evaluation*
- *Get Additional Reviewers*
- *Get Feedback from Review*

You can configure routing modifiers for these steps when you edit the *Start Development Plan* business process definition:

- *Complete Employee Plan*

- *Complete Manager Plan*
- *Get Additional Reviewers*
- *Set Plan Content*

You can configure routing modifiers for these steps when you edit the *Start Disciplinary Action* business process definition:

- *Complete Manager Evaluation*
- *Complete Self Evaluation*
- *Set Disciplinary Action Content*

You can configure routing modifiers for these steps when you edit the *Start Performance Improvement Plan* business process definition:

- *Complete Manager Plan*
- *Set Plan Content*

Workday recommends not to use routing modifiers if the additional position manager and the primary position manager are in the same organization. In this scenario, Workday will route the step to both managers.

Related Information
Tasks
Set Up Multiple Position Routing

Performance Reviews

Setup Considerations: Performance Reviews

You can use this topic to help make decisions when planning your configuration and use of performance reviews. 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

You can use performance reviews to provide feedback on workers' performance to help improve worker effectiveness and engagement. You can also use performance reviews to assist in coaching and driving worker development.

Business Benefits

You can configure performance reviews to:

- Track your workers' performance and drive their development.
- Enable discussions with workers about their competencies, goals, and development items.
- Connect performance reviews to compensation, making it easier to reward workers when your organization uses performance-based compensation.

Use Cases

You can conduct performance reviews to run:

- Periodically to coordinate with the compensation process in your organization and align with your goals.

- On an ad hoc basis so workers can continue to develop outside of the scheduled review period.

Questions to Consider

Questions	Considerations
How often do you want to schedule periodic performance reviews?	Determine the frequency of your performance reviews based on who in your organization is participating and when the review period takes place. Set up different employee review templates for different review periods.
How do you want to organize performance review templates for specific worker groups?	Set up your domains and employee review templates to enable different requirements for specific worker groups. Example: Special review templates for sales workers.
Who do you want to initiate performance reviews?	Use the Maintain Review Types task to determine who can start performance reviews. Example: You can configure the task to enable workers to start their own performance reviews, or enable only managers or HR partners to initiate the reviews.
Are you moving content from a previous review to a review for a new period?	You can configure the Load Content from Previous Review prompt in your review templates to carry over or consolidate content from previous reviews.
Are you using net attainment of goals to help determine compensation?	Determine how to calculate the net attainment and include the Goals section in the performance review template.
How do you want to rate the component parts of your performance reviews?	You can assign ratings to individual items and sections on employee review templates, or on performance reviews. You can use Workday-provided rating scales or create your own custom scales to align performance reviews with Calibration, Compensation, or Succession.
Who needs to acknowledge and approve performance reviews?	You can configure business process steps to support approvals and acknowledgments. Acknowledgments only apply to managers and employees. You have more flexibility when setting up approvals so that other types of workers can approve a performance review.
Do you want to include calibration in your performance reviews?	Include the appropriate business process steps to support calibration.
How can you include embedded analytics in performance reviews to provide more reporting about your workers?	You can configure embedded analytics on the *Complete Manager Evaluation for Performance Review* and the *Get Additional Reviewers for Performance Review* business processes to provide custom reports you enable as worklets or use Workday preconfigured worklets. You can use these reports to provide more context and information about your workers' performance.
How can you conduct international reviews for workers with multiple positions when the	When workers have multiple positions in different countries, route steps to the home country

Questions	Considerations
primary and secondary managers are in different countries?	manager or the host country manager using business process routing modifiers.
What data do you want to gather with performance reviews and how do you want to measure it?	You can configure templates to require workers to complete specific fields. You can include summary sections or comments. You can set up templates to weight items and sections, or include item ratings and calculated ratings.
Do you want additional managers or reviewers to provide feedback?	You can set up your business processes to support additional manager evaluations. You can enable up to 2 additional managers to provide evaluation comments for workers. You can include the Competencies section in a template to enable additional reviewers. Additional reviewers can comment only on this section.

Recommendations

- Use care when setting the Period Start Date and Period End Date values for the *Start Performance Review* business process. Don't schedule an employee review with dates that overlap an existing employee review of the same review type.
- Select the Period Start Date and Period End Date values when you load content from a previous review and you configure the template with the *Carryover with Item Evaluation Content* or *Consolidate* option. These dates determine which content is eligible for the current review.

  The Period End Date value also controls worker access to review data when you select the *View Only On Completed Review* option in the Employee View Option prompt on the template. When you select this option, workers don't see their review data until after the Period End Date and the process is complete.
- Don't set the start date to before a worker's hire date.
- Copy the template before you launch the official review, because you can't edit review templates when reviews are in progress or complete.
- Test your employee review templates before launching the review. If you need to update a template during testing, cancel the reviews first and edit the template.

Requirements

- When you include the Questions section on your review template, you must configure question categories and questions for feedback and review.

Limitations

Workday doesn't support parallel steps on performance reviews because it can lead to inconsistent results.

Tenant Setup

No impact.

Security

Configure these domains in the Performance Enablement functional area:

Domains	Considerations
Self-Service: Performance Reviews	Provides workers self-service access to starting and updating their own performance reviews.
Set Up: Employee Reviews	Enables workers with the administrator role to configure all parts of the employee review process.
Performance and Goals: Contingent Worker Eligibility	Enables contingent workers to participate in employee reviews, including performance reviews.
Process: Employee Reviews	Enables workers to start and view employee reviews. Workday requires this domain for organization-level performance reviews. Example: Administrators or support roles such as HR Partner.
Set Up: Goals	Enables workers to add goals when you include the Goals section on the performance review.
Worker Data: Performance Reviews	Provides access for roles who need to view another worker's performance review. Example: Managers and support roles such as HR Partner or HR Administrator.
Worker Data: Review Event	Enables workers to complete performance reviews on behalf of other workers and run the My Team's Performance Reviews report.

Business Processes

Business Processes	Considerations
Complete Additional Evaluation for Performance Review	You can enable contingent workers to serve as additional reviewers for performance reviews when you include the Competencies section on employee review templates.
Complete Additional Manager Evaluation for Performance Review	You can configure steps that enable additional managers to add, change, or delete comments on the performance review.
Complete Self Evaluation for Performance Review	You can enable workers to evaluate themselves as part of a performance review.
Get Additional Manager Evaluation for Performance Review	You can enable workers to add up to 2 additional managers to the performance review.
Get Additional Reviewers for Performance Review	You can enable workers to add additional reviewers in Competencies sections.
Set Review Content for Performance Review	You can determine what actions workers and managers can perform in the performance review process.
Start Performance Review	Determine whether you want the performance review process to be simple or complex. Examples: You can include a Set Content step, or enable others to evaluate a worker's competencies.

Reporting

Reports or Dashboards	Considerations
My Team's Additional Manager Evaluations report	Enables you to report on worker evaluations by other managers. Workday doesn't display the primary manager's comments to additional managers.
My Team's Performance Reviews report	Enables managers to view performance reviews for their entire team in a single report.
Performance Review Status report	Enables managers to view the statuses of their workers' performance reviews. Managers can drill down on details for individual workers.

Integrations

Web Services	Considerations
Get Employee Reviews	Imports employee reviews for performance reviews.
Import Employee Reviews	Loads in-progress and completed performance reviews.
Load Employee Reviews	Loads the employee review information of a worker.
Put Employee Reviews	Loads performance reviews.
Put Review Type	Adds, edits, and removes review types, including performance reviews.
Start Performance Review	Creates in-progress or completed performance reviews.
Update Employee Review Rating	Loads overall ratings and overall manager comments for performance reviews for both workers and contingent workers.

Connections and Touchpoints

Performance reviews can touch the Compensation functional area in Workday. Performance reviews also interact with Manager Insights Hub. Managers can start and view information related to performance reviews within Manager Insights Hub. See Setup Considerations: Manager Insights Hub.

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: Load Content from Previous Review on page 1670

Concept: Session Timeout

Setup Considerations: Manager Insights Hub on page 2933

Tasks

Create Employee Review Section Types on page 1627

Steps: Create Employee Review Templates on page 1627

Create Rating Scales on page 1644

Steps: Calibrate Talent and Performance Ratings on page 1709

Examples

2025R2 Release Note: Flex Team Hosts as Performance Review Additional Managers

Steps: Set Up Performance Reviews

Prerequisites

Configure the *Start Performance Review* business processes and security policies in the Performance Enablement functional area.

Context

Set up employee reviews to support performance evaluation and personal development.

To use custom labels throughout Talent, use the Maintain Custom Labels task.

Note: In review documents, custom labels don't override labels created with the Create Employee Review Template and Maintain Employee Review Setup tasks.

Steps

1. (Optional) Determine if your event is large enough that you need to work with the Workday Production Readiness team.

   See Workday Community: Production Readiness: Large Volume Events Best Practices for guidelines about opening a Production Readiness case.
2. Define Employee Review Types on page 1625.
3. Set up the individual components that you plan to include in employee reviews:

Option	Description
Career	You can include: • Career interests. • Job interests. • Travel preferences. • Relocation preferences. Steps: Set Up Interests on page 1535
Competencies	Add competencies and rate them in employee reviews. • Create Proficiency Rating Scales on page 123 • Create or Edit Competencies on page 125
Development Items	You can include ad hoc development items in employee reviews. Create Development Items on page 1529
Feedback	The self-evaluation and manager evaluation forms can include feedback received during the employee review process (performance reviews and development plans only) and outside of it. Steps: Set Up Feedback on page 1737

Option	Description
Goals	Add goals directly into employee reviews or create them outside of the review process. You can also map your statuses that define a worker's progress toward completing a goal to the delivered Workday statuses. • Create or Edit Individual Goals on page 1518 • Set Up Goal Completion Statuses on page 1514
Questions	Include questions in employee reviews and create categories to organize them into related groupings. Create or Edit Review Questions on page 1626

4. (Optional) Create Rating Scales on page 1644.
5. Create review templates and define their content:
    a) (Optional) Create Employee Review Section Types on page 1627.
    b) (Optional) Define Employee Review Rules on page 1646.
    c) Steps: Create Employee Review Templates on page 1627.
    d) (Optional) Copy Employee Review Templates on page 1634.
    e) (Optional) Change Labels on Employee Reviews on page 1648.
6. (Optional) Maintain Employee Review Acknowledgement Statuses on page 1650.
7. (Optional) Set Up Performance Worklets on page 1687.
8. (Optional) Add performance reviews to dashboards.

    See Steps: Set Up Dashboards and Landing Pages.

    Set up the Team Performance dashboard to combine analytics and actions for managing teams and their performance from a single place. You can use the default menu as a starting point.
9. (Optional) Add performance review reports to profile groups.

    See Steps: Set Up Profiles and Profile Groups.

Related Information

Concepts

Concept: Employee Reviews on page 1652

Concept: Best Practices for All Large-Scale Events

Tasks

Steps: Manage Performance Reviews on page 1681

Create Custom Labels

Reference

Reference: Feedback Business Processes on page 1761

Reference: Event-Specific Best Practices

Steps: Set Up Performance Reviews for Contingent Workers

Prerequisites

Complete the setup procedure for performance reviews.

Context

Workday gives you the option to conduct performance reviews for contingent workers and enable them to participate in the review process the same way as employees do. This option enables you to conduct performance reviews for a wider population of your workers.

Steps

1. Add the security group with the contingent workers you want to include to *Performance and Goals: Contingent Worker Eligibility* domain to make them eligible for performance reviews.

   Example: Add the *Contingent Worker as Self: AMEA* security group to the *Performance and Goals: Contingent Worker Eligibility* domain.
2. Add the security group to the security domains that you use for performance reviews.

   Example: Add the *Contingent Worker as Self: AMEA* security group to the *Self-Service: Performance Reviews* domain.
3. Add the same security group to your performance review business process policy:
   - Initiating actions.
   - Actions.
   - Action steps.
4. Activate Pending Security Policy Changes.
5. Edit the *Start Performance Review* business process to include the security group for contingent workers on all self-service steps.

Result

You can include contingent workers in your performance review events.

Next Steps

Contingent workers use the Start My Performance Review task to self-initiate a performance review. Managers use the Start Performance Review for Employee task or the Start Performance Review for Organization task to start performance reviews for contingent workers.

Steps: Manage Performance Reviews

Prerequisites

Complete the setup procedure for employee reviews.

Context

You can add and edit content, manage ratings and weightings, and track progress within the 4 employee review categories in Workday:

- Performance Reviews
- Development Plans
- Disciplinary Actions
- Performance Improvement Plans

In addition, Workday enables you to complete performance reviews and development plans using the Workday on iPad and Workday on iPhone apps. Managers can also track review progress directly from the Team Profile on the iPad.

Steps

1. Start Employee Reviews on page 1658.

   See Concept: Employee Reviews on page 1652.
2. Pause Employee Review After Set Review Content Step on page 1663.
3. Send back or pull forward performance reviews.

   See Steps: Enable Sending Back or Pulling Forward Performance Reviews on page 1682.
4. (Optional). Access the Mass Advance Business Process task.

   Advance any performance review business processes.

   Security: *Business Process Administration* domain in the System functional area.
5. Track the status of employee reviews with reports.

   See Concept: Track Employee Reviews on page 1668.
6. Print Employee Reviews on page 1663.

Related Information

Concepts

Concept: Get Additional Reviewers for Competencies on page 1654

Concept: The Employee Review Process on page 1665

Tasks

Steps: Set Up Performance Reviews on page 1679

Steps: Purge Person Privacy Data

Steps: Enable Sending Back or Pulling Forward Performance Reviews

Context

You can use the My Team's Performance Reviews report to send back or pull forward performance reviews for your employees. Users with access on the *Manual Send Back* action of the *Start Performance Review* business process security policy can change the current step for in-progress reviews.

Send back and pull forward actions are only available for performance reviews and not the other employee review types.

You can only pull forward a performance review when the review is in progress and is on the *Complete Self Evaluation* initiation step.

Workday saves all review content including comments, but removes any acknowledgments. When a participant in a review has changed roles or organizations, Workday routes the action steps to the original participant, but sends approvals to the current incumbent.

Steps

1. Edit Domain Security Policies.

   Add managers to the *Worker Data: Review Event* domain.
2. Edit Business Processes.

   Enable pulling performance reviews forward. Configure the *Start Performance Review* business process definition so that the *Complete Self Evaluation* initiation step immediately precedes the *Complete Manager Evaluation* initiation step.

   The *Complete Self Evaluation* business process definition must contain only the initiation step.
3. Edit Business Process Security Policies.

   Enable administrators to perform manual send back. Add administrators to a security group specified in the *Manual Send Back* action of the *Start Performance Review* business process security policy.

Result

Managers can:

- Send a review back from the *Complete Manager Evaluation* initiation step by clicking Send Back.
- Pull a review forward from the *Complete Self Evaluation* step to the *Complete Manager Evaluation* step by clicking Complete On Behalf Of from the My Team's Performance Reviews report.

Administrators can manually send back a performance review event by selecting Business Process > Manual Send Back from the related actions menu.

Related Information

Concepts

Concept: Business Process Management

Concept: Performance Review Management

You can use 2 methods to manage the workflow of performance reviews:

My Team's Performance Reviews

With this report, managers can view all in-progress and completed performance reviews for their employees and send back or pull forward a performance review under specific conditions:

- At the *Complete Self Evaluation* initiation step, you can pull a review forward to the *Complete Manager Evaluation* step if it's the immediate next step.
- At the *Complete Manager Evaluation* initiation step, you can send a review back to the *Complete Self Evaluation* step if it's the immediately preceding step and the review is in progress.
- After the *Complete Manager Evaluation* initiation step but before the completion step, you can send a review back to the *Complete Manager Evaluation* initiation step. You must repeat the subsequent steps and the acknowledgment, but any comments that you previously entered are saved.

Manual Send Back

Administrators or other roles secured to the *Manual Send Back* action in the *Start Performance Review* business process security policy can:

- Move an in-progress review from any step to any step.
- Reopen a completed review and send it back to the *Complete Manager Evaluation* step. A manager then can use the My Team's Performance Reviews report to take further action.

  When you manually send back a completed review, Workday automatically skips:

  - The *Get Additional Reviewers* and *Get Feedback from Review* steps (if configured).
  - Steps that run concurrently with the *Complete Manager Evaluation* step.

Additional Manager Evaluations

Steps: Set Up Additional Manager Evaluations

Prerequisites

Configure the *Start Performance Review* business process and security policy in the Performance Enablement functional area.

Context

You can configure up to 2 additional managers to provide comments concurrently in a single employee review.

Steps

1. Enable Additional Manager Evaluations on page 1684.

2. Enable comments for 1 or more sections in the employee review template.

   You must have either section comments or item comments or both enabled for 1 or more sections.

   See Steps: Create Employee Review Templates on page 1627.
3. Configure the *Get Additional Manager Evaluation* business process and security policy in the Performance Enablement functional area.

   Add the *Complete Additional Manager Evaluation* action step to the *Get Additional Manager Evaluation* business process and assign the Employee as Self group to it. For contingent workers, assign the Contingent Worker as Self group to the action step of the business process.

   See Edit Business Process Security Policies.
4. Add the *Get Additional Manager Evaluation* subprocess to the *Start Performance Review* business process.

   Configure this subprocess to be before the *Complete Manager Evaluation for Performance Review* subprocess.
5. Add the Additional Manager Evaluations report to the My Team's Performance Reviews profile group.

   See Steps: Set Up Profiles and Profile Groups.

Result

You can add additional managers to provide comments in an employee review.

Note: If an administrator enables the *Talent Effect* option in the leave type for an employee on a Leave of Absence, you can't select the employee as an additional manager in the Get Additional Manager Evaluation business process.

Enable Additional Manager Evaluations

Prerequisites

Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

Enable additional manager evaluations in the review template as a part of setting up additional manager evaluations.

Steps

1. Access 1 of these tasks:
   - Create Employee Review Template to create a new template.
   - Configure Employee Review Template to edit an existing template.
2. Click Edit.
3. Select the Enable Additional Manager Evaluations for All Sections check box.
4. Select the desired check boxes:
   - Display Additional Manager Comments.

     When selected, additional managers can see each others' comments after they submit them. Workday doesn't display the primary manager's comments to additional managers.
   - Display Additional Manager Names.

     When left cleared, Workday displays managers' comments under the name *Anonymous*.

Next Steps

Configure these business processes and their security policies:

- *Get Additional Manager Evaluation for Performance Review*.
- *Complete Additional Manager Evaluation for Performance Review*.

Related Information
Tasks
Edit Business Process Security Policies

Manage Additional Manager Evaluations

Prerequisites

- Set up additional manager evaluations.
- Use the Configure Profile Group task to add the Additional Manager Evaluations report to the My Team's Performance Reviews profile group.
- Security: *Worker Data: Performance Reviews* and *Worker Data: Review Event* domains in the Performance Enablement functional area.

Context

The Additional Manager Evaluations report displays all in-progress and completed additional manager evaluations for your employees and enables you to pull forward and send back additional manager evaluations.

You can't pull forward or send back additional manager evaluations for completed performance reviews. Workday cancels outstanding additional manager evaluations after the *Start Performance Review* business process completes.

You can add this report to the My Team's Performance Reviews profile group.

Steps

- Access the Additional Manager Evaluations report.
- To pull additional manager evaluations forward, click Complete On Behalf Of.

  This action completes the *Complete Additional Manager Evaluation for Performance Review* business process.
- To send a review back, click Send Back.

  This action sends the review back to the initiation step of the *Complete Additional Manager Evaluation for Performance Review* business process.
- To revise a completed additional manager evaluation, select Correct from the related actions menu of the *Complete Additional Manager Evaluation for Performance Review* business process instance.

  You must belong to a security group that is secured to the *Correct* action on the *Complete Additional Manager Evaluation for Performance Review* business process security policy.

Related Information
Tasks
Steps: Enable Sending Back or Pulling Forward Performance Reviews on page 1682

Concept: Additional Manager Evaluations

You can make performance reviews more comprehensive by enabling up to 3 managers (the primary manager and up to 2 additional managers) to provide comments concurrently in a single review. You can set up both employees and contingent workers as additional managers.

Note: This feature is separate from the Multiple Managers feature that enables you to assign multiple managers to a supervisory organization.

Additional managers can provide section comments in all employee review sections supported by the editor. Workday supports only certain sections in specific editors. Additional managers can provide item comments in these sections:

- Accomplishments
- Competencies
- Goals
- Questions
- Responsibilities

Additional managers can add or delete items in these sections:

- Accomplishments
- Development Items
- Goals
- Responsibilities
- Supporting Documents

Get Additional Manager Evaluation

The *Get Additional Manager Evaluation for Performance Review* business process provides a Reviewers prompt where you can select a maximum of 2 additional managers to add comments in the manager evaluation. You can select any employee from the Reviewers prompt.

You can select a manager of a matrix organization to serve as an additional manager. See Assign Workers to a Matrix Organization for more information.

If your organization uses Flex Teams, hosts of the worker's Flex Teams are also available as additional managers. Users with access to the *Flex Teams* domain can view the Flex Team Hosts prompt category in the Reviewers prompt. See Concept: Flex Teams on page 1598 for more information about Flex Team hosts.

You can also select any contingent worker from the Reviewers prompt. Enable contingent workers by configuring the security group on the initiating action of the *Complete Additional Manager Evaluation for Performance Review* business process policy.

Complete Additional Manager Evaluation

The *Complete Additional Manager Evaluation for Performance Review* business process is a subprocess of the *Get Additional Manager Evaluation for Performance Review* business process. This subprocess enables additional managers to:

- Add, change, and delete items in the review sections.
- Enter, change, and delete comments for all items and sections enabled for comments.
- View each other's names and submitted comments (when configured on the review template).

Complete Manager Evaluation

The current manager can see all additional manager comments on the Complete Manager Evaluation document once submitted.

Additional Manager Evaluations Report

The Additional Manager Evaluations report enables you to manage the additional manager evaluation process. You can pull forward and send back additional manager evaluations from this report.

You can use the Configure Profile Group task to add the Additional Manager Evaluations report to the My Team's Performance Reviews profile group.

Related Information
Concepts
Concept: Employee Review Guided Experience Editor on page 1653

Set Up Performance Worklets

Prerequisites

- Create employee review templates for performance reviews.
- Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

The Performance Review Status worklet displays the number of performance reviews that are:

- *Complete*
- *In Progress*
- *Not Launched*

These numbers display when you specify which performance review templates to include. The *Not Launched* number only includes workers who are eligible for performance reviews using the employee review templates you created.

When you access this worklet, Workday finds the performance review templates where the current date is:

- After the template start date.
- Before the template end date + 3 months.

Workday compares these templates to performance reviews for your direct reports. If a performance review status matches, it's included in the count. If the current date is after the template end date + 3 months, Workday won't find any performance reviews to display.

Steps

1. Access the Maintain Employee Review Setup task.
2. Click the Worklet tab. As you complete the task, consider:

Option	Description
Employee Review Templates used in Performance Worklets	Select the *Performance Review* templates you want to report in the worklet. Only templates for the Review Type of *Performance Review* are available. To hide the Performance Review Status numbers on the Team Performance dashboard, clear this field. You can include current fiscal year performance review templates in this field to report on recent performance reviews of your workers.
Reporting Target Rating Scale	Select the rating scale to use in reports when the performance review template doesn't include a default rating scale. Workday normalizes any ratings to this scale.
Review Templates Used in Performance Over Time Report Field	Used in the Performance Over Time reports or report fields. Select if you use Performance Over Time as an axis for a talent matrix report. Workday also uses this field to identify the 3 most recent performance reviews for the Review Rating report fields.

Option	Description
	The Performance Over Time calculation excludes ratings from templates that have an Overall section in which the Rating Configuration is set to *Manual Entry*.
Rating Scale Used in Performance Over Time Report Field	Select if you use Performance Over Time as an axis for a talent matrix report. Workday also uses this field to normalize performance ratings for the Review Rating report fields.

Related Information

Concepts

Concept: Talent Matrix Reports on page 1801

Concept: Landing Pages

Tasks

Change Labels on Employee Reviews on page 1648

Steps: Create Employee Review Templates on page 1627

Reviews with Calibration

Steps: Set Up Reviews with Calibration

Prerequisites

- Configure:
  - The *Start Performance Review* business process and security policy in the Performance Enablement functional area.
  - The *Launch Calibration* business process and security policy in the Performance Enablement or Talent Pipeline functional areas.
- Security: *Set Up: Calibration* domain in the Performance Enablement and Talent Pipeline functional areas.

Context

Set up performance reviews with calibration to support calibrated performance ratings across your organization as part of your performance review business process.

Steps

1. From the related actions menu of the *Complete Manager Evaluation for Performance Review* business process:
   a) Select Business Process > Edit Definition.
   b) (Optional) Add the *Await Calibration Completion* service step after the *Initiation* step to pause the business process when the calibration program is launched and automatically resume the business process when the calibration program is submitted.

      Workday executes this service step only if the review includes calibration.
   c) Add the *Update Performance Review Ratings for Manager Evaluation* action step directly after the *Await Calibration Completion* service step and assign it to a manager group.

2. From the related actions menu of the *Launch Calibration* business process:
    a) Select Business Process > Edit Definition.
    b) Create a new *To Do* step before the shared participation step and Specify as *Hold for Review*.

       This step halts calibration and ensures that manager evaluations are complete before calibration launches. See Concept: To Do Step.
    c) Assign the *To Do* step to a security group with access to all employees in the calibration program. Workday recommends only adding Talent Administrators to this security group.
    d) Verify that this security group can access the Rating – Most Recent report field, secured to the Worker business object.
3. Set up a calibration program with the default rating fields applicable to reviews with calibration.
    a) Access the Create Calibration Program task.

       Specify the program name, nBox report, and other applicable information.
    b) Select the Calibration Default Values tab.

       From the Default value to choose prompt, select *Rating - Overall for Reviews with Calibration* and *Potential - Performance Review with Calibration*.
4. (Optional) If you want to include the Assess Potential step in calibration, select Potential - Performance Review with Calibration as a default value in the calibration program.
    a) From the related actions menu of the *Start Performance Review* business process, select Business Process > Edit Definition.
    b) Add the *Assess Potential* action step before the *Complete Manager Evaluation* To Do step and assign it to a manager security group.

Next Steps

Access the Start Performance Review for Organization task (secured to the *Process: Employee Reviews* domain in the Performance Enablement functional area) to begin reviews with Calibration.

(Optional) Verify the *Await Calibration Completion* step of the business process by confirming that Workday hasn't generated any tasks in My Tasks for managers and that the step is in progress. Submit the entire calibration event, not just the manager portion. Confirm that the business process has moved past the *Await Calibration Completion* step and onto the next step.

Related Information

Concepts

Concept: The Employee Review Process on page 1665

Tasks

Set Up Calibration Programs on page 1719

Edit Business Processes

Start Reviews with Calibration

Prerequisites

- Configure the *Start Performance Reviews* business process and security policy in the Performance Enablement functional area.
- Set up performance reviews with calibration.
- Security: *Process: Employee Reviews* domain in the Performance Enablement functional area.

Context

When you start performance reviews with calibration for an organization, calibration for the same population starts simultaneously. Workday pulls in the overall review rating and the potential assessment into the calibration. Workday displays the completed calibrated review rating in the manager evaluation.

If running Performance Reviews with Calibration, Workday recommends that you use the Facilitate Calibration task instead of Mass Operations Management (MOM) to either:

- Pull the calibration task forward.
- Enable the highest-level manager to Complete on Behalf of.

Steps

1. (Optional) Determine if your event is large enough that you need to work with the Workday Production Readiness Team. See Workday Community: Production Readiness: Large Volume Events Best Practices for guidelines about opening a Production Readiness case.
2. Access the Start Performance Review for Organization task.
3. Select the applicable organization, template, and review period.

   If the review period is defined in the template, Workday populates these dates automatically.
4. Select the applicable calibration program from the Calibration Program prompt.

   Workday uses the rules and dates defined in the review template to determine employee eligibility.

Result

The selected calibration program launches at the same time as the performance review event for the same group of employees.

Related Information
Concepts

Concept: The Employee Review Process on page 1665

Concept: Best Practices for All Large-Scale Events

Tasks

Steps: Calibrate Talent and Performance Ratings on page 1709

Resume Reviews on Hold

Prerequisites

Security: *Process: Employee Reviews* domain in the Performance Enablement functional area.

Context

During performance reviews with calibration, Workday places the *Update Performance Review Ratings for Manager Evaluation* business process on hold if the calibration event isn't complete. When you resume the on-hold reviews, Workday displays the calibrated review rating for these workers.

Administrators or other assigned roles can manually resume the on-hold reviews even if the calibration for all employees is still in progress.

When you include the *Await Calibration Completion* step, the review automatically resumes when you submit the calibration program.

Steps

1. Access the Resume Employee Reviews On Hold task.
2. Select the Employee Review Organization Initiation from the prompt.

   The background process to resume the reviews starts. You can drill down on *Performance Reviews on Hold* to see the reviews that are on hold.

Next Steps

Run the Process Monitor report to check the status of the resumed employee reviews.

Related Information

Concepts

Concept: The Employee Review Process on page 1665

Concept: Workday Scheduled Processes

Concept: Employee Reviews with Calibration

Performance reviews are the only employee review type that integrates with calibration. Integrating calibration simplifies the review process. You can:

- Calibrate the same population as the one you're reviewing.
- Pull the overall rating from a review into calibration.
- Place the review process on hold until the calibration event is complete.

  Note: Administrators can prevent delays in the process by resuming on-hold reviews before the calibration event is complete.
- View the calibrated rating in the manager evaluation of reviews.

Reviews with Calibration Process

When you start performance reviews with calibration for your organization, Workday simultaneously launches the calibration program. The rules and dates defined in the review template determine employee eligibility. Rules defined for reviews supersede rules that are defined for calibration. A *To Do* step on the *Launch Calibration* business process pauses calibration until the manager evaluations are complete. Workday then pulls the overall review ratings and potential assessment (if configured) from the review into the calibration.

Report fields specific to reviews with calibration determine the calibration default values for initial worker placement:

- *Rating - Overall for Reviews with Calibration*.
- *Potential - Performance Review with Calibration*.

You can now use the overall rating and potential assessment (if configured) from the review to compare, adjust, and plot worker placements in the calibration nBox.

After calibration is complete, the *Update Performance Review Ratings for Manager Evaluation* step in the *Complete Manager Evaluation* business process displays the calibrated review rating in the manager evaluation under Additional Details.

Entry conditions on this step:

- Prevent it from running when you don't select a calibration program on the Start Performance Review for Organization task.
- Place it on hold when the calibration event hasn't completed.
- Prevent it from running when the worker is included in a different calibration event.

You can use these report fields:

- *Status for Calibration* to create a validation rule on the *Update Performance Review Ratings for Manager Evaluation* subprocess.
- *Calibrated Rating - Manager* and *Calibrated Rating* to create an entry condition that skips the *Update Performance Review Ratings for Manager Evaluation* step when the calibrated rating and overall rating are the same.

You can perform the same actions on the *Update Performance Review Ratings for Manager Evaluation* step as the *Complete Manager Evaluation* step except Send Back.

Note: Workday doesn't include the calibrated review rating in performance review printouts.

Related Information

Concepts

Concept: The Employee Review Process on page 1665

Tasks

Steps: Calibrate Talent and Performance Ratings on page 1709

Development Plans

Steps: Set Up Development Plans

Prerequisites

Configure the *Start Development Plan* business process and security policies in the Performance Enablement functional area.

Context

Set up employee reviews to support performance evaluation and personal development.

To use custom labels throughout Talent, use the Maintain Custom Labels task.

Note: In review documents, custom labels don't override labels created with the Create Employee Review Template and Maintain Employee Review Setup tasks.

Steps

1. Define Employee Review Types on page 1625.
2. Set up the individual components that you plan to include in employee reviews:

Option	Description
Career	You can include: • Career interests. • Job interests. • Travel preferences. • Relocation preferences. Steps: Set Up Interests on page 1535
Competencies	Add competencies and rate them in employee reviews. • Create Proficiency Rating Scales on page 123 • Create or Edit Competencies on page 125
Development Items	You can include ad hoc development items in employee reviews. Create Development Items on page 1529
Feedback	The self-evaluation and manager evaluation forms can include feedback received during the employee review process (performance reviews and development plans only) and outside of it. Steps: Set Up Feedback on page 1737

Option	Description
Goals	Add goals directly into employee reviews or create them outside of the review process. You can also map your statuses that define a worker's progress toward completing a goal to the delivered Workday statuses. • Create or Edit Individual Goals on page 1518 • Set Up Goal Completion Statuses on page 1514
Questions	Include questions in employee reviews and create categories to organize them into related groupings. Create or Edit Review Questions on page 1626

3. (Optional) Create Rating Scales on page 1644.
4. Create review templates and define their content:
   a) (Optional) Create Employee Review Section Types on page 1627.
   b) (Optional) Define Employee Review Rules on page 1646.
   c) Steps: Create Employee Review Templates on page 1627.
   d) (Optional) Copy Employee Review Templates on page 1634.
   e) (Optional) Change Labels on Employee Reviews on page 1648.
5. (Optional) Maintain Employee Review Acknowledgement Statuses on page 1650.
6. (Optional) Set Up Performance Worklets on page 1687.
7. (Optional) Add development plans to dashboards.

   See Steps: Set Up Dashboards and Landing Pages.

   Set up the Team Performance dashboard to combine analytics and actions for managing teams and their performance from a single place. You can use the default menu as a starting point.
8. (Optional) Add development plan reports to profile groups.

   See Steps: Set Up Profiles and Profile Groups.

Related Information

Concepts

Concept: Employee Reviews on page 1652

Tasks

Create Custom Labels

Steps: Manage Development Plans on page 1694

Reference

Reference: Feedback Business Processes on page 1761

Steps: Set Up Development Plans for Contingent Workers

Prerequisites

Complete the setup procedure for development plans.

Context

Workday gives you the option to create development plans for contingent workers enabling you to use development plans for a wider population of your workers.

Steps

1. Add the security group with the contingent workers you want to include to *Performance and Goals: Contingent Worker Eligibility* to make them eligible for development plans.

   Example: Add the *Contingent Worker as Self: AMEA* security group to the *Performance and Goals: Contingent Worker Eligibility* domain.
2. Add the security group with the contingent workers you want to include in the development plan to the security domains that you use for development plans.

   Example: Add the *Contingent Worker as Self: AMEA* security group to the *Self-Service: Development Plan* domain.
3. Add the same security group to your development plan business process policy:

   - Initiating actions.
   - Actions.
   - Action steps.
4. Activate Pending Security Policy Changes.
5. Edit the *Start Development Plan* business process to include the security group for contingent workers on all self-service steps.

Result

You can create development plans for contingent workers.

Next Steps

Contingent workers use the Start My Development Plan task to self-initiate a development plan. Managers use the Start Development Plan for Employee or Start Development Plan for Organization task to start development plans for contingent workers.

Steps: Manage Development Plans

Prerequisites

Complete the setup procedure for employee reviews.

Context

You can add and edit content, manage ratings and weightings, and track progress within the 4 employee review categories in Workday:

- Performance Reviews
- Development Plans
- Disciplinary Actions
- Performance Improvement Plans

In addition, Workday enables you to complete performance reviews and development plans using the Workday on iPad and Workday on iPhone apps. Managers can also track review progress directly from the Team Profile on the iPad.

Steps

1. Start Employee Reviews on page 1658.

   See Concept: Employee Reviews on page 1652.
2. Pause Employee Review After Set Review Content Step on page 1663.

3. (Optional). Access the Mass Advance Business Process task.

   Advance any development plan business processes.

   Security: *Business Process Administration* domain in the System functional area.
4. Track the status of employee reviews with reports.

   See Concept: Track Employee Reviews on page 1668.
5. Print Employee Reviews on page 1663.

Related Information

Concepts

Concept: Get Additional Reviewers for Competencies on page 1654

Concept: The Employee Review Process on page 1665

Tasks

Steps: Purge Person Privacy Data

Disciplinary Actions

Steps: Set Up Disciplinary Actions

Prerequisites

Configure the *Start Disciplinary Action* business process and security policies in the Performance Enablement functional area.

Context

Set up employee reviews to support performance evaluation and personal development.

To use custom labels throughout Talent, use the Maintain Custom Labels task.

Note: In review documents, custom labels don't override labels created with the Create Employee Review Template and Maintain Employee Review Setup tasks.

Steps

1. Define Employee Review Types on page 1625.
2. Set up the individual components that you plan to include in employee reviews:

Option	Description
Career	You can include: • Career interests. • Job interests. • Travel preferences. • Relocation preferences. Steps: Set Up Interests on page 1535
Competencies	Add competencies and rate them in employee reviews. • Create Proficiency Rating Scales on page 123 • Create or Edit Competencies on page 125
Development Items	You can include ad hoc development items in employee reviews. Create Development Items on page 1529

Option	Description
Feedback	The self-evaluation and manager evaluation forms can include feedback received during the employee review process (performance reviews and development plans only) and outside of it. Steps: Set Up Feedback on page 1737
Goals	Add goals directly into employee reviews or create them outside of the review process. You can also map your statuses that define a worker's progress toward completing a goal to the delivered Workday statuses. • Create or Edit Individual Goals on page 1518 • Set Up Goal Completion Statuses on page 1514
Questions	Include questions in employee reviews and create categories to organize them into related groupings. Create or Edit Review Questions on page 1626

3. (Optional) Create Rating Scales on page 1644.
4. Create review templates and define their content:
    a) (Optional) Create Employee Review Section Types on page 1627.
    b) (Optional) Define Employee Review Rules on page 1646.
    c) Steps: Create Employee Review Templates on page 1627.
    d) (Optional) Copy Employee Review Templates on page 1634.
    e) (Optional) Change Labels on Employee Reviews on page 1648.
5. Maintain Disciplinary Action Reasons and Categories on page 1698.
6. (Optional) Maintain Employee Review Acknowledgement Statuses on page 1650.
7. (Optional) Set Up Performance Worklets on page 1687.
8. (Optional) Add disciplinary actions to dashboards.

    See Steps: Set Up Dashboards and Landing Pages.

    Set up the Team Performance dashboard to combine analytics and actions for managing teams and their performance from a single place. You can use the default menu as a starting point.
9. (Optional) Add disciplinary action reports to profile groups.

    See Steps: Set Up Profiles and Profile Groups.

    Workday only displays the Disciplinary Actions report tab on profiles when there is at least 1 completed or in-progress disciplinary action for a given worker. Workday doesn't display the Disciplinary Actions tab when:

    - The worker hasn't started or completed any disciplinary actions.
    - All previous disciplinary actions have been rescinded or canceled.

Related Information

Concepts

Concept: Employee Reviews on page 1652

Tasks

Create Custom Labels

Steps: Manage Disciplinary Actions on page 1697

Steps: Set Up Disciplinary Actions for Contingent Workers

Prerequisites

Complete the setup procedure for disciplinary actions.

Context

Workday gives you the option to conduct disciplinary actions for contingent workers enabling you to use disciplinary actions for a wider population of your workers.

Steps

1. Add the security group with the contingent workers you want to include to *Performance and Goals: Contingent Worker Eligibility* to make them eligible for disciplinary actions.

   Example: Add the *Contingent Worker as Self: AMEA* security group to the *Performance and Goals: Contingent Worker Eligibility* domain.
2. Add the security group with the contingent workers you want to include in the performance improvement plan to the security domains that you use for disciplinary actions.

   Example: Add the *Contingent Worker as Self: AMEA* security group to the *Self-Service: Disciplinary Action* domain.
3. Add the same security group to your disciplinary action business process policy:
   - Initiating actions.
   - Actions.
   - Action steps.
4. Activate Pending Security Policy Changes.
5. Edit the *Start Disciplinary Action* business process to include the same security group on all self-service steps.
6. Edit the *Complete Manager Evaluation for Disciplinary Action* business process to include the security group for contingent workers on all self-service steps.

Result

You can conduct disciplinary actions for contingent workers.

Next Steps

Managers use the Start Disciplinary Action for Employee task to start a disciplinary action for a contingent worker.

Steps: Manage Disciplinary Actions

Prerequisites

Complete the setup procedure for employee reviews.

Context

You can add and edit content, manage ratings and weightings, and track progress within the 4 employee review categories in Workday:

- Performance Reviews
- Development Plans
- Disciplinary Actions

- Performance Improvement Plans

In addition, Workday enables you to complete performance reviews and development plans using the Workday on iPad and Workday on iPhone apps. Managers can also track review progress directly from the Team Profile on the iPad.

Steps

1. Start Employee Reviews on page 1658.

   See Concept: Employee Reviews on page 1652.
2. Pause Employee Review After Set Review Content Step on page 1663.
3. (Optional). Access the Mass Advance Business Process task.

   Advance any disciplinary action business processes.

   Security: *Business Process Administration* domain in the System functional area.
4. Track the status of employee reviews with reports.

   See Concept: Track Employee Reviews on page 1668.
5. Print Employee Reviews on page 1663.

Related Information

Concepts

Concept: The Employee Review Process on page 1665

Tasks

Steps: Purge Person Privacy Data

Examples

Example: Calculating Section Summary Ratings on page 1703

Example: Calculating the Overall Rating Using Mapped Section Ratings and Weightings on page 1704

Maintain Disciplinary Action Reasons and Categories

Prerequisites

Security: *Set Up: Employee Reviews* domain in Performance Enablement functional area.

Context

Disciplinary categories and reasons provide a consistent list of disciplinary actions for managers to use. They're specific to a location.

Workday automatically includes a Disciplinary Action Information section in review templates. You don't need to configure it.

Steps

1. Access the Maintain Disciplinary Action Reasons and Categories task.
2. Select the Country or Country Region.
3. Reasons are organized by category. Create a new category for disciplinary actions or find the appropriate category for the reason. Category Name and Reason Category Code are required.
4. Create a reason under the appropriate category. Reason and Reason Code are required.

Example

Some examples of categories are:

- Attendance
- Drugs and Alcohol
- Theft

Some examples of reasons within the Attendance category are:

- More Than 30 Minutes Late
- Missed Entire Day
- Less than 30 Minutes Late

Next Steps

Start a disciplinary action.

Related Information
Tasks
Steps: Manage Disciplinary Actions on page 1697
Steps: Set Up Disciplinary Actions on page 1695

Performance Improvement Plans

Steps: Set Up Performance Improvement Plans

Prerequisites

Configure the *Start Performance Improvement Plan* business processes and security policies in the Performance Enablement functional area.

Context

Set up employee reviews to support performance evaluation and personal development.

To use custom labels throughout Talent, use the Maintain Custom Labels task.

Note: In review documents, custom labels don't override labels created with the Create Employee Review Template and Maintain Employee Review Setup tasks.

Steps

1. Edit Business Processes.

   Performance improvement plans derive their security for comment steps from other employee review types by default. Edit the definition for the *Complete Manager Plan for Performance Improvement Plan* business process to enable employees and managers to provide comments.

   - Add an *Action* step and specify *Provide Employee Review Comments* and assign it to the *Employee as Self* group.
   - Add an *Action* step and specify *Provide Manager Review Comments* and assign it to the *Manager* group.
2. Define Employee Review Types on page 1625.
3. Set up the individual components that you plan to include in employee reviews:

Option	Description
Career	You can include: • Career interests. • Job interests. • Travel preferences. • Relocation preferences. Steps: Set Up Interests on page 1535
Competencies	Add competencies and rate them in employee reviews.

Option	Description
	• Create Proficiency Rating Scales on page 123 • Create or Edit Competencies on page 125
Development Items	You can include ad hoc development items in employee reviews. Create Development Items on page 1529
Feedback	The self-evaluation and manager evaluation forms can include feedback received during the employee review process (performance reviews and development plans only) and outside of it. Steps: Set Up Feedback on page 1737
Goals	Add goals directly into employee reviews or create them outside of the review process. You can also map your statuses that define a worker's progress toward completing a goal to the delivered Workday statuses. • Create or Edit Individual Goals on page 1518 • Set Up Goal Completion Statuses on page 1514
Questions	Include questions in employee reviews and create categories to organize them into related groupings. Create or Edit Review Questions on page 1626

4. (Optional) Create Rating Scales on page 1644.
5. Create review templates and define their content:
    a) (Optional) Create Employee Review Section Types on page 1627.
    b) (Optional) Define Employee Review Rules on page 1646.
    c) Steps: Create Employee Review Templates on page 1627.
    d) (Optional) Copy Employee Review Templates on page 1634.
    e) (Optional) Change Labels on Employee Reviews on page 1648.
6. (Optional) Maintain Employee Review Acknowledgement Statuses on page 1650.
7. (Optional) Set Up Performance Worklets on page 1687.
8. (Optional) Add performance improvement plan reports to dashboards.

    See Steps: Set Up Dashboards and Landing Pages.

    Set up the Team Performance dashboard to combine analytics and actions for managing teams and their performance from a single place. You can use the default menu as a starting point.

9. (Optional) Add performance improvement plan reports to profile groups.

   See Steps: Set Up Profiles and Profile Groups.

   Workday only displays the Performance Improvement Plans report tab on profiles when there is at least 1 completed or in-progress performance improvement plan for a given worker. Workday doesn't display the Performance Improvement Plans tab when:

   - The worker hasn't started or completed any performance improvement plans.
   - All previous performance improvement plans have been rescinded or canceled.

Related Information

Concepts

Concept: Employee Reviews on page 1652

Tasks

Create Custom Labels

Steps: Manage Performance Improvement Plans on page 1702

Steps: Set Up Performance Improvement Plans for Contingent Workers

Prerequisites

Complete the setup procedure for performance improvement plans.

Context

Workday gives you the option to complete performance improvement plans for contingent workers.

Steps

1. Add the security group with the contingent workers you want to include to *Performance and Goals: Contingent Worker Eligibility* to make them eligible for performance improvement plans.

   Example: Add the *Contingent Worker as Self: AMEA* security group to the *Performance and Goals: Contingent Worker Eligibility* domain.
2. Add the security group with the contingent workers you want to include in the performance improvement plan to the security domains that you use for performance improvement plans.

   Example: Add the *Contingent Worker as Self: AMEA* security group to the *Self-Service: Performance Improvement Plan* domain.
3. Add the same security group to your performance improvement plans business process policy:
   - Actions.
   - Initiating Actions.
   - Action steps.
4. Activate Pending Security Policy Changes.
5. Edit the *Start Performance Improvement Plan* business process to include the same security group on all relevant steps.

Result

You can create performance improvement plans for contingent workers.

Next Steps

Managers use the Start Performance Improvement Plan for Employee task to start a performance improvement plan for contingent workers.

Steps: Manage Performance Improvement Plans

Prerequisites

Complete the setup procedure for employee reviews.

Context

You can add and edit content, manage ratings and weightings, and track progress within the 4 employee review categories in Workday:

- Performance Reviews
- Development Plans
- Disciplinary Actions
- Performance Improvement Plans

In addition, Workday enables you to complete performance reviews and development plans using the Workday on iPad and Workday on iPhone apps. Managers can also track review progress directly from the Team Profile on the iPad.

Steps

1. Start Employee Reviews on page 1658.

   See Concept: Employee Reviews on page 1652.
2. Pause Employee Review After Set Review Content Step on page 1663.
3. (Optional). Access the Mass Advance Business Process task.

   Advance any performance improvement plan business processes.

   Security: *Business Process Administration* domain in the System functional area.
4. Track the status of employee reviews with reports.

   See Concept: Track Employee Reviews on page 1668.
5. Print Employee Reviews on page 1663.

Related Information

Concepts

Concept: The Employee Review Process on page 1665

Tasks

Steps: Purge Person Privacy Data

Employee Review Ratings and Weightings

Concept: Ratings and Weightings

In Workday, you can assign a rating to either an individual item or the entire section for these sections:

- Accomplishments
- Competencies
- Goals
- Questions
- Responsibilities

You can also assign a rating to the entire employee review, which summarizes all the section ratings.

You can assign different rating scales to different sections in the same template. The Workday-calculated overall rating will normalize the rating scales. Assigning a rating value of *Not Applicable* excludes these items from calculation.

You can also assign a weight to each individual item and section, specifying that total weight:

- Must equal 100.
- Has no restriction.

Workday uses these 2 values to generate a section summary rating and overall rating.

When you pull individual goals into a review, you can override the existing goal weights if the template requires the total goal weight to equal 100. Workday updates the My Goals report to reflect the new weighting after the review is complete.

Note: If you change the status of a weighted section to *Not applicable* when *Weighting must total 100*, adjust the weighting of all weighted items to a total value equal to 100.

Related Information

Tasks

Steps: Create Employee Review Templates on page 1627

Create Rating Scales on page 1644

Create Proficiency Rating Scales on page 123

Concept: Hide Section Weights and Ratings

In employee reviews configured to use Guided Experience, you can hide section weights or ratings so they're not visible to employees and managers by configuring the template section settings using the Configure Employee Review Template task. You can hide section weights or ratings in these sections:

- Accomplishments
- Competencies
- Goals
- Questions

To hide section weights, you must enable calculated ratings in the Overall section, enable 1 of the options in the Section Rated field, and select the Hide Section Weight check box.

You can also hide ratings in a template section of employee reviews when you configure the employee review template to use calculated ratings. Workday hides or displays section ratings depending on your settings:

- When you set the Section Rating field to *Ratings with No Overrides*, Workday hides the ratings in the section.
- When you set the Section Rating field to *Ratings with Overrides* or *Prompt for Rating*, Workday displays both the rating and the calculated rating in the Summary section. You can hide the section ratings by clearing the Show Calculated Rating Value and Show Mapped Calculated Section Rating check boxes.

Related Information

Reference

Reference: Employee Review Template Ratings and Comments Fields on page 1639

Reference: Employee Review Template Weightings Fields on page 1642

Example: Calculating Section Summary Ratings

This example shows how you calculate section summary ratings for goals.

Context

The formula for calculating the section summary rating is:

(Sum of each (rate X associated weight)) / total weight

Example: You're using a 5 Point Rating Scale to evaluate goals that use goal rating and weighting:

Goal	Rate	Weight = 100	Weight = Unlimited
1	4.0	25	50
2	4.0	25	25
3	3.0	50	50

The calculation when using weighting equals 100 is:

((4 X 0.25) + (4 X 0.25) + (3 X 0.5)) = 3.5

The calculation when using weighting equals unlimited is:

((4 X 0.5) + (4 X 0.25) + (3 X 0.5)) / (0.5 + 0.25 + 0.5) = 3.6

Note: In these examples, if Goal 3 had a rating that was set up on the rate table with the Exclude From Calculations check box, the calculation would be:

(4 + 4) / 2 = 4

To determine the Section Summary Rating, Workday maps the 3.5 or 3.6 values to a 4 - Exceeds Expectations rating on the 5 Point Rating Scale:

Rating Name	Rating Value	Begin Range	End Range
1 - Does Not Meet Expectations	1	0	1.49
2 - Needs Improvement	2	1.5	2.49
3 - Meets Expectations	3	2.5	3.49
4 - Exceeds Expectations	4	3.5	4.49
5 - Company Maker	5	4.5	5

Related Information

Tasks

Steps: Create Employee Review Templates on page 1627

Create Rating Scales on page 1644

Example: Calculating the Overall Rating Using Mapped Section Ratings and Weightings

This example shows how to calculate the overall rating using mapped section ratings and weightings. To enable this option, don't select the Calculated Rating uses Section Rating Precision check box in the Overall section on the employee review template.

Context

The calculation for the Overall Rating is the same formula as the calculation for the Section Summary Rating:

(Sum of each (rate X associated weight)) / total weight

When you use different rating scales in your sections, Workday normalizes those section summary ratings to the rating scale used by the Overall section. That formula is:

Normalized section rating = overall section's lowest rating scale value + ((section summary's rating - section summary's lowest rating scale value) X (overall section's highest rating scale value - overall section's lowest rating scale value) / (section summary's highest rating scale value - section summary's lowest rating scale value))

Example: You have 3 sections that use section weighting (Accomplishments, Goals, and Questions) and an Overall section. You can use this data to calculate the Overall Rating:

Table 5: Rating Scales

Rating Scale Name	Rating Name	Rating Value	Begin Range	End Range
3 Point Scale	1 - Does Not Meet Expectations	1	0	1.49
	2 - Meets Expectations	2	1.5	2.49
	3 - Exceeds Expectations	3	2.5	3
5 Point Scale	1 - Does Not Meet Expectations	1	0	1.49
	2 - Needs Improvement	2	1.5	2.49
	3 - Meets Expectations	3	2.5	3.49
	4 - Exceeds Expectations	4	3.5	4.49
	5 - Company Maker	5	4.5	5

Table 6: Employee Review

Section	Rating Scale	Section Weight	Mapped Rating
Accomplishments	5 Point Scale	40%	4
Goals	5 Point Scale	40%	3
Questions	3 Point Scale	20%	2
Overall	5 Point Scale	*not applicable*	*Calculated*

The normalized rating for each section is:

Section	Calculation for Normalized Rating
Accomplishments	1 + ((4 - 1) X (5 - 1) / (5 - 1)) = 4
Goals	1 + ((3 - 1) X (5 - 1) / (5 - 1)) = 3
Questions	1 + ((2 - 1) X (5 - 1) / (3 - 1)) = 3

Workday can use the standard formula to calculate the Overall Rating:

(4 X 0.4) + (3 X 0.4) + (3 X 0.2) = 3.4

Next, Workday maps 3.4 to the corresponding rating on the 5 Point Scale:

3.4 maps to 3 - Meets Expectations. So the Overall Rating is 3 - Meets Expectations.

Related Information

Concepts

Concept: Ratings and Weightings on page 1702

Tasks

Steps: Create Employee Review Templates on page 1627
Configure the Overall Section on page 1632

Example: Calculating the Overall Rating Using Calculated Section Ratings and Weightings

This example shows how you calculate overall rating of a worker using calculated section ratings and weightings.

Context

The calculation for the Overall Rating is:

(Sum of each (rate X associated weight)) / total weight

When you use different rating scales in the sections, Workday normalizes those section summary ratings to the rating scale used by the Overall section.

Note: For this calculation method, Workday uses the calculated section summary rating and not the mapped rating.

The formula for that is:

Normalized section rating = overall section's lowest rating value + ((section summary's rating - section summary's lowest rating value) X (overall section's highest rating value - overall section's lowest rating value) / (section summary's highest rating value - section summary's lowest rating value))

Example: You have 3 sections that use section weighting (Accomplishments, Goals, and Questions) and an Overall section. We can use this data to calculate the Overall Rating:

Table 7: Rating Scales

Rating Scale Name	Rating Name	Rating Value	Begin Range	End Range
3 Point Scale	1 - Does Not Meet Expectations	1	0	1.49
	2 - Meets Expectations	2	1.5	2.49
	3 - Exceeds Expectations	3	2.5	3
5 Point Scale	1 - Does Not Meet Expectations	1	0	1.49
	2 - Needs Improvement	2	1.5	2.49
	3 - Meets Expectations	3	2.5	3.49
	4 - Exceeds Expectations	4	3.5	4.49
	5 - Company Maker	5	4.5	5

Table 8: Employee Review

Section	Rating Scale	Section Weight	Calculated Rating
Accomplishments	5 Point Scale	40%	3.9
Goals	5 Point Scale	40%	3
Questions	3 Point Scale	20%	2.5
Overall	5 Point Scale	*not applicable*	*Calculated*

The normalized rating for each section is:

Section	Calculation for Normalized Rating
Accomplishments	1 + ((3.9 - 1) X (5 - 1) / (5 - 1)) = 3.9
Goals	1 + ((3 - 1) X (5 - 1) / (5 - 1)) = 3
Questions	1 + ((2.5 - 1) X (5 - 1) / (3 - 1)) = 4

Workday can use the standard formula to calculate the Overall Rating:

(3.9 X 0.4) + (3 X 0.4) + (4 X 0.2) = 3.56

Next, Workday maps 3.56 to the corresponding rating on the 5 Point Scale:

3.56 maps to 4 - Exceeds Expectations. So the Overall Rating is 4 - Exceeds Expectations.

To enable this option, select the Calculated Rating uses Section Rating Precision check box in the Overall section on the employee review template.

Related Information

Tasks

Steps: Create Employee Review Templates on page 1627

Configure the Overall Section on page 1632

Example: Calculating the Overall Rating Using Item Averaging

This example shows how to calculate the overall rating of a worker using item averaging. To enable this option, select the Calculated Rating uses Item Averaging check box in the Overall section on the employee review template.

Context

You can calculate an Overall Rating that is just a simple average of all individual items in an employee review, regardless of the section from which they belong. The Overall Rating calculation is:

Sum of each individual rate / # of items

When you use different rating scales in the sections, Workday normalizes the ratings to the rating scale used by the Overall section. The formula for that is:

Normalized section rating = overall section's lowest rating scale value + ((section summary's rating - section summary's lowest rating scale value) X (overall section's highest rating scale value - overall section's lowest rating scale value) / (section summary's highest rating scale value - section summary's lowest rating scale value))

Example: You have 3 sections: Accomplishments, Goals, and Questions. You can use this data to calculate the Overall Rating:

Table 9: Rating Scales

Rating Scale Name	Rating Name	Rating Value	Begin Range	End Range
3 Point Scale	1 - Does Not Meet Expectations	1	0	1.49
	2 - Meets Expectations	2	1.5	2.49
	3 - Exceeds Expectations	3	2.5	3
5 Point Scale	1 - Does Not Meet Expectations	1	0	1.49
	2 - Needs Improvement	2	1.5	2.49
	3 - Meets Expectations	3	2.5	3.49
	4 - Exceeds Expectations	4	3.5	4.49
	5 - Company Maker	5	4.5	5

Table 10: Employee Review

Section	Rating Scale	Item Rating
Accomplishments	5 Point Scale	4
Goals	5 Point Scale	3
Questions	3 Point Scale	2

Section	Rating Scale	Item Rating
Overall	5 Point Scale	*Calculated*

The normalized rating for each section is:

Section	Calculation for Normalized Rating
Accomplishments	1 + ((4 - 1) X (5 - 1) / (5 - 1)) = 4
Goals	1 + ((3 - 1) X (5 - 1) / (5 - 1)) = 3
Questions	1 + ((2 - 1) X (5 - 1) / (3 - 1)) = 3

Now Workday can use the formula to calculate the Overall Rating:

(4) + (3) + (3) / 3 = 3.333

3.333 maps to 3 - Meets Expectations on the 5 Point Scale used by the Overall section.

FAQ: Employee Reviews

How does content carry over when multiple employee reviews have the same review period end date?

You can move content from a review section with the most recent period end date to the same section type in the new review. When multiple reviews have the same period end date, content from the review with the most recent initiation date or completion date timestamp carries over to the new review.

Can I configure the employee self-evaluation and manager evaluation in the same step of the employee review business process?

For best results, we recommend that you configure the *Complete Self Evaluation* and *Complete Manager Evaluation* subprocesses as separate steps on these business processes:

- *Start Development Plan*
- *Start Disciplinary Action*
- *Start Performance Improvement Plan*
- *Start Performance Review*

Do employee review rules apply to supervisory organizations?

Workday applies employee review rules to employees, not organizations.

Example: Create an employee review rule called *Rule for 2000 Executive Management* that targets the 2000 Executive Management supervisory organization. Apply this rule in the *2000 Executive Org Review* template. Start a performance review for the 4000 Human Resources organization using the Start Performance Review for Organization task. Select the *2000 Executive Org Review* template.

Workday doesn't generate a review event for employees in the 4000 Human Resources organization because it's using a template that applies the *Rule for 2000 Executive Management* rule.

Can contingent workers participate in employee reviews?

Your organization can configure development items, disciplinary actions, performance improvement plans, and performance reviews to include contingent workers. If you configure employee reviews to include contingent workers, you can use the same tasks, reports, web services, and worklets for contingent workers as you do for employees. Contingent workers can use the Start My Development Plan and Start My Performance Review to self-start these review types.

Related Information

Concepts

Concept: Load Content from Previous Review on page 1670

Concept: The Employee Review Process on page 1665

Tasks

Steps: Set Up Development Plans for Contingent Workers on page 1693

Steps: Set Up Disciplinary Actions for Contingent Workers on page 1697

Steps: Set Up Performance Improvement Plans for Contingent Workers on page 1701

Steps: Set Up Performance Reviews for Contingent Workers on page 1680

Reference

Reference: Employee and Contingent Worker Differences on page 743

Talent and Performance Calibration

Steps: Calibrate Talent and Performance Ratings

Prerequisites

Configure the Competencies section in the employee review template if you want to use a rating scale, not a proficiency scale.

Context

You can set up and manage calibration to compare and adjust employee talent and performance ratings. You can perform these types of calibration:

- Talent calibration places employees in a 2-rating matrix, for succession planning and employee development.
- Performance calibration distributes employees across a rating scale based on a single rating value from performance reviews.

Steps

1. Access the Launch Calibration task.

   Workers can only be part of 1 calibration event at a time. If your tenant has fewer than 10,000 workers (active or otherwise), you can see how many are eligible or ineligible for the calibration program in the selected organizations. You can also include subordinate organizations below the top level you select and your calibration program.

2. (Managers) Access the Calibrate Team task in their My Tasks.

   Managers receive an individual Calibrate Team task in their My Tasks for each organization they manage, unless an organization is a subordinate of another. As they work with this task, they can:

   - Drag and drop workers into boxes.
   - Select search facets to filter workers.
   - Zoom in or out of boxes.
   - Collapse or expand the side panels.
   - Hover over target icons in boxes to view target percentages, if available.
   - Toggle between the nBox view and the list view.
   - View worker preview cards and access-related actions.
   - View and manage the status of subordinate organizations that they can complete calibration on behalf of or send back inbox events.
3. (Optional) Hide Calibration Workers on page 1725.
4. Access the Facilitate Calibration report.

   HR Partners can view in-progress calibration events and calibrate employees. They can also manually advance tasks or send them back in the calibration process.

   Security: *Facilitate Calibration* domain in the Performance Enablement and Talent Pipeline functional areas.
5. Access the Manage Calibration report.

   HR or Talent Administrators can adjust for organizational, worker, and role changes that occur after launching calibration, and view the status of all tasks.

   Security: *Set Up: Calibration* domain in the Performance Enablement and Talent Pipeline functional areas.
6. Access the My Tasks item to submit the calibration.

   The HR Administrator submits the final calibration from My Tasks, after all managers submit their My Tasks items, or when the event is manually advanced.

Next Steps

View the final calibration values for employees using the Worker Calibration History and My Team's Calibration History reports.

Create custom reports to analyze in-progress calibration data.

Related Information

Concepts

Concept: Manage Calibration on page 1726

Tasks

Create Custom Labels

Reference

The Next Level: Engaging Talent

Examples

Example: Calibration nBox Placement on page 1730

Configure Custom Organizations for Calibration

Prerequisites

Create assignable roles and security groups for the facilitator and the participants.

Context

Custom organizations enable you to calibrate talent and performance ratings for a group of workers when there isn't a supervisory organization that captures the desired employee structure.

Steps

1. Access the Maintain Organization Types report.
2. Click the Custom tab.

   Create custom organizations with multiple levels for calibration using a custom hierarchy that:

   - Is similar to a supervisory hierarchy where all organizations are of the same custom organization type.
   - Is similar to a cost center hierarchy where the organization hierarchy has a parent organization type that contains no workers and a child organization type that contains workers.
3. As you create the custom organization, consider:

Option	Description
Allows Hierarchy	Select if you want to conduct reorganizations and include them on the Manage Calibration report after launching calibration.
Allow Reorganization Tasks (like Move Workers, Assign Workers)	Select if you want to conduct worker changes and include them on the Manage Calibration report after launching calibration.
Show in Change Organization Assignments and Job Requisition	Select if you want to be able to conduct worker assignment changes and include them in the Manage Calibration report after launching calibration.
Position Assignment Unique	(Required for custom organizations for calibration.) Select to limit workers to 1 custom organization in the hierarchy for calibration. Select this value for custom organization types that can contain workers. Workday requires this option because calibration needs custom organizations to have workers belong to a singular organization to properly execute the calibration.
Rolls Up Organization Type	(Optional) Enter the rollup organization type if your custom organization hierarchy contains 2 organization types.

   You can't change these settings if there's an in-progress Calibration event on the custom organization type. You can't configure membership rules for custom organizations if you plan to perform calibration on the members of the organization.

Next Steps

Create a *Launch Calibration* business process definition that uses this custom organization.

Related Information

Concepts

Concept: Custom Organizations

Tasks

Set Up Nonsupervisory Organizations

Steps: Assign Membership Rules in Custom Organizations

Setup Considerations: Calibration nBox Reports

You can use this topic to help make decisions when planning your configuration and use of the nBox report feature for calibration. 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

An nBox report is a 2-dimensional grid where administrators can adjust the placement of workers, based on predetermined ratings. When used in Calibration to evaluate talent and performance ratings, nBox reports enable managers to view, share, and adjust the ratings of their workers.

When you create an nBox report, link it to a calibration program, and launch calibration, Workday enables you to update the data in that calibration program until your calibration event is complete.

Business Benefits

When you use nBox reports in calibration, you can:

- Design and deploy performance reviews for your employees that best fit the needs of your organization, including a calibration process to ensure fair ratings for all workers across your organization.
- Identify candidates for succession planning.
- Perform talent or performance calibrations using real-time reports for informed decision-making across your organizational hierarchy.

Use Cases

- Managers can assess their workers' performance and potential to determine their placement in organizational succession planning.
- HR Partners and managers can share the calibration assessment of workers.

Questions to Consider

Questions	Considerations
What attributes can I customize in an nBox report?	You can customize these aspects of the nBox report: • Custom row and column values. • Rating values to calibrate. • Worker display options. • Fields for the list view. • Search facets to filter workers. • Tenant calibration values mapping in the grid. • Box labels in the grid.

Questions	Considerations
What types of users can assist managers with their Calibrate Team tasks in My Tasks?	Users such as Talent Administrators, HR Partners, or Talent Partners can assist managers when you add them to user-based or role-based security groups on the *Facilitate Calibration* domain security policy. These users can access the Facilitate Calibration task to assist managers with their Calibrate Team task in My Tasks.
What's the difference between talent and performance reviews?	Talent reviews are forward-looking and take into account the worker's potential, career trajectory, and placement in succession planning. Performance reviews evaluate the worker's past performance over a specific period of time.
What's the difference between an in-progress calibration nBox report and a post-calibration nBox report?	Workday treats calibration events as in-progress events until they're complete. In-progress calibration events use a dynamic nBox report, which enables you to update the report's contents. When a calibration event is complete, you can use a talent matrix nBox report to view the calibration results using the most recent data available within a static report. You can use the Rating - Current report field on the Talent Matrix Placement nBox report to view most recent calibration data.

Recommendations

- Design your nBox reports using the Workday-delivered Talent Matrix reports available in your tenant.
- Determine the drillable fields and detail data you would like to include in your nBox reports to display additional details about workers.
- Determine the facets you'd like to configure on your nBox reports. The facets you select impact the analysis you can perform on calibration results. You can't include additional facets on a completed calibration event.
- For large-scale calibration events, Workday recommends running routine performance tests on nBox report definitions. Consider the performance impact of using calculated fields as you run performance tests.

Requirements

Don’t copy or import nBox reports into a tenant. You can corrupt the report, making it unusable in calibration. Instead, create a new calibration program and link it to an nBox report.

Limitations

- You can configure only 1 value to each axis of an nBox report for calibration.
- You can't copy or import nBox reports into a tenant.

Tenant Setup

You can disable calibration quick tips information for your tenant on the Edit Tenant Setup - System task.

Security

Configure these domains in the System functional area:

- *Custom Report Administration*

- *Custom Report Creation*

Business Processes

No impact.

Reporting

Reports or Dashboards	Considerations
Calibration Dashboard	Configure this dashboard to enable: • HR Administrators or Talent Administrators to access the calibration values of workers for a completed calibration event. • Managers to view and track the status of their organization's in-progress calibration events.
Manage Calibration	Displays the count of events in each calibration status and the changes made to the organization, workers, and roles. Drill into the counts to view more details for each status during calibration.

Consider setting up:

- The Indexed In Progress Worker Calibration Placements report data source to enable users to access the calibrated values of a worker who is part of an in-progress calibration event.
- The Indexed In Progress Worker Calibration Events report data source to enable users to view updated calibration values on nBox reports in real-time. All nBox reports use this report data source to launch calibration events.

Integrations

No impact.

Connections and Touchpoints

Features	Considerations
Employee Reviews	Set up to enable performance reviews as an employee review type within calibration to review, compare, adjust, and plot worker placements in the calibration nBox report.
Talent Reviews	Set up to include talent review criteria, based on employee eligibility rules and dates defined in the talent review template, into the calibration program to display updated employee potential assessment ratings post calibration.

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: The Employee Review Process on page 1665

Tasks

Steps: Set Up Reviews with Calibration on page 1688

Create Calibration nBox Reports

Prerequisites

Security:

- *Custom Report Creation* domain in the System functional area.
- *Worker Data: Calibration* domain in the Performance Enablement and Talent Pipeline functional areas.

Context

Create the framework for talent and performance calibration by customizing these features in a calibration nBox report:

- Rating values to calibrate.
- Worker display options.
- Fields for the list view.
- Search facets to filter workers.

Facet values are based on worker attributes when calibration launches.

Steps

1. Create or copy a calibration nBox report using the Indexed In Progress Worker Calibration Placements data source with 1 of these tasks:

    - Create Custom Report
    - Copy Custom Report
    - Copy Standard Report to Custom Report

    Workday recommends using the Create Custom Report task when building your nBox reports. You can use the same calibration nBox report for multiple calibration programs if you don't change the calibration values of the nBox report.

    Note: Workday recommends against importing nBox reports for use in calibration.
2. On the Matrix tab, select the calibration values and calibration nBox report layout.
    a) In the Row Grouping section, select a calibration field as a Group by Field.

       For performance calibration, you must select *Calibration: Default Performance Axis*.
    b) In the Column Grouping section, select another calibration field as a Group by Field.

       For performance calibration, this field typically is *Calibration: Overall Performance Rating*.
    c) In the nBox Display section, specify whether to display an Image only or Image and text for workers in the nBox view.
       Workday displays a:

        - Generic image for workers who don't have photos.
        - Crowd icon when a box has too many workers to display individual images.

       Each box displays up to 2,000 images.

3. On the Drill Down tab, configure the drill-down fields to display in the calibration list view.

   Detail Data fields define the columns in the list view. These fields display additional information about workers. Your nBox report must include the Worker field. Other useful fields include:

   - Photo.
   - Organization.
   - Worker's Manager.
   - Time in Position.
   - Retention.
   - Succession Plans.
4. On the Prompts tab, add:

Field	Default Type	Required
Calibration Node for nBox	No default value	Yes

5. On the Share tab, select 1 of these options to share the report with calibration participants:

   - Share with all authorized users provides access based on the security groups defined on the *Worker Data: Calibration* domain.
   - Share with specific authorized groups and users limits access to selected Authorized Groups or Authorized Users. The groups and users should match the security groups that have permission in the Shared Participation step on the *Launch Calibration* business process.
6. On the Advanced tab, configure search facets for the calibration activity.

   Facet Filters enable participants to navigate the target population and filter workers on criteria such as:

   - Supervisory organization.
   - Management chain.
   - Talent pool.

Result

You can update the nBox report definition after launching calibration, so you can adjust it to improve performance as you conduct calibration. To improve the performance of the Calibrate Team and Facilitate Calibration tasks:

- Define your nBox report so it only includes fields in Detail Data and necessary facets for the calibration decision process.
- Minimize the use of calculated fields in your nBox report definition.
- Limit the number of organization levels in the Restrict Organization Level View prompt to the fewest levels you require.

Next Steps

- Configure mappings and labels with the Set Up nBox Report task.
- To modify the calibration nBox report definition, use the Edit Custom Report task.

Related Information

Tasks

Steps: Calibrate Talent and Performance Ratings on page 1709

Set Up Calibration nBox Reports

Prerequisites

- Create the Calibration nBox report.

- Security: *Custom Report Administration* domain in the System functional area.

Context

The calibration values you map onto an nBox report determine the report fields that Workday updates after calibration is complete. You can:

- Map tenanted calibration values to the nBox grid.
- Define box labels.
- Add help text to guide managers with employee placement during the calibration activity.

Example:

- The *Calibration: Potential* value updates the *Potential* field.
- The *Calibration: Talent Based Performance Rating* value updates the *Talent Matrix Review Rating* field.

Complete these steps for every nBox report you use for calibration.

Steps

1. Access the Set Up nBox Report task.
2. Select the calibration nBox report you want to configure.

   Don't use nBox reports referenced in ongoing calibration events. Instead, Workday recommends that you create a new calibration program and link it to a new nBox report with the updated calibration values.
3. In the Define the Rows and Define the Columns sections, add labels and map calibration values.

   If an nBox report is used in a completed or in-progress calibration event, don’t change the values in the Define the Rows and Define the Columns sections.

   In the Source Value, map a single field value in your Workday tenant to each column and row in the grid. The source field is the Group By Field that you selected for rows in the calibration nBox report definition. The Source Value represents the final value that writes back to the worker after Calibration is completed.
4. (Optional) Click Continue and define box names and help text for the calibration nBox report.

   Each row represents a box in the nBox grid with the row and column mappings shown. Each box is labeled with the Box Name and displays the Help Text when you hover over the label.

Example

Define the Rows

Field: *Calibration: Overall Performance Rating*

Row Axis Label: Performance

Row Label	Source Values
Exceeds	4 - Exceeds Expectations
Meets	3 - Meets Expectations
Below	1 - Doesn't Meet Expectations

Define the Columns

Field: *Calibration: Potential*

Row Axis Label: Potential

Column Label	Source Values
Low	Placement Issue
Medium	Correctly Placed
High	High Potential

Define the Box Names

Row	Column	Box Name
Performance: Exceeds	Potential: Low	Workers
Performance: Exceeds	Potential: Medium	Contributors
Performance: Exceeds	Potential: High	Stars
Performance: Meets	Potential: Low	Blockers
Performance: Meets	Potential: Medium	Transitionals
Performance: Meets	Potential: High	Emergers
Performance: Below	Potential: Low	Detractors
Performance: Below	Potential: Medium	Placeholders
Performance: Below	Potential: High	Latents

Next Steps

When you create the calibration program, select the configured calibration nBox report in the nBox field.

Related Information
Tasks
Steps: Calibrate Talent and Performance Ratings on page 1709

Define Calibration Program Rules

Prerequisites

Security: *Set Up: Calibration* domain in the Performance Enablement or Talent Pipeline functional area.

Context

Create condition rules to define worker eligibility for calibration programs. You can use the rule to restrict the worker population in the calibration event. Calibration automatically excludes contingent workers and inactive organizations, and only includes workers' primary positions. If a condition rule changes after calibration launches, the Manage Calibration task only includes worker changes that meet the revised condition rule.

Calibration rules are similar to employee review and talent review rules. The rule evaluates whether employees match the criteria you specify, such as hire date. You can also create categories to organize calibration rules with the Maintain Condition Rule Categories task.

If your calibration program rules limit the workers that can participate in calibration, Workday evaluates these rules every time you run the Manage Calibration report. If your program uses a rule with many conditions or calculated fields, this task might take time to load.

Steps

1. Access the Create Calibration Program Rule task.
2. Enter a Description to distinguish the rule.
3. (Optional) Select a rule Category.
4. To copy an existing condition, select a rule from the Copy Condition from Rule prompt.
5. In the Rule Conditions grid, build a condition rule to identify employees eligible for a particular calibration program.

Next Steps

- When you create the calibration program, select this rule in the Applies To field.
- To modify the rule, use the Edit Calibration Program Rule task.

Related Information

Tasks

Steps: Calibrate Talent and Performance Ratings on page 1709

Create Business Process Condition Rules

Reference

The Next Level: Overview of Primary Position Designation Impact

Set Up Calibration Programs

Prerequisites

- Set up the calibration nBox report.
- Security: *Set Up: Calibration* domain in the Performance Enablement or Talent Pipeline functional area.

Context

A calibration program defines each aspect of the calibration activity, including:

- Target population rules.
- Calibration nBox report.
- Calibration value mappings that determine the default position of the worker on the calibration nBox report when you launch calibration.
- Any target box percentages.
- Default calibration values.

You can create any number of calibration programs. You can also use the same program for multiple calibration events.

Steps

1. Access the Create Calibration Program task.
2. To label calibration tasks and events, enter a Program Name.

3. (Optional) Specify a Due Date to use to create query alerts that notify managers or other roles when the due date is near. This date doesn't end the calibration event.
4. Select the nBox report.
5. As you complete the task, consider:

Option	Description
Hide nBox Summary View	This option hides the nBox summary view on the Submit Calibration summary page, improving calibration program performance.
Applies To	Select a rule that determines employee eligibility for the calibration program. You can create the options in this prompt using the Create Calibration Program Rule task. If you leave this field blank, the program includes all eligible employees in the organization that you select at launch.
Unplotted Help Text	You can provide information about unplotted workers not populated in the grid view.
Allow update of Assess Potential during Calibration	This option adds up to 6 employee attributes to the calibration list view: • Achievable Level. • Loss Impact. • Notes. • Potential (if not used as an axis in the calibration nBox report). • Retention Risk. • 2 configurable Potential Assessment Value fields you can set up using the Maintain Talent Matrix Setup task.
Restrict Organization Level View	To restrict the number of workers displayed in the nBox and list views of a calibration session, enter a value of *1* or *2*. A value of: • *1* displays the manager’s direct reports and workers 1 level below. • *2* displays the manager's direct reports and workers 2 levels below. • *Zero* displays all workers in the organization. A worker with a role at multiple levels of the organization, such as an HR business partner, can see 1 or 2 levels below the lowest level. This worker can also see all levels above the lowest level.
Autocomplete First Participant	You can skip the first participant when calibration launches.
Select Validation for Unplotted Worker	You can configure 2 types of notices for Workday to alert calibration participants if any workers remain unplotted using the Restrict Organization Level View population size.

Option	Description
	Select Warning to warn calibration participants with an alert that at least 1 or more workers are unplotted, but allow them to proceed. Select Error to stop calibration participants with an alert that at least 1 or more workers are unplotted, and require they fix the error before submitting.
Select Validation for Target Percentage Population	You can configure 2 types of notices for Workday to alert calibration participants if any target percentages populations aren't met in each box using the Restrict Organization Level View population size. Select Warning to warn calibration participants with an alert that any target percentages populations aren't met in each box, but allow them to proceed. Select Error to stop calibration participants with an alert that any target percentages populations aren't met, and require they fix the error before submitting.

6. (Optional) On the Calibration Value Mapping tab, map rating values to the source field defined in nBox setup to define initial worker placement.

   Leave this tab blank if you want to start the calibration activity with all workers unplotted.
7. (Optional) Click Target Percentages to recommend the percentage of the target population to place in each box.

   You can set targets for all boxes or just a subset of boxes.

   Workday converts the percentages into numbers when it renders the calibration nBox report, but only enforces the percentages if you configure the Select Validation for Target Percentage Population field to issue a warning or error message. Workday also rounds down the target numbers to provide more conservative estimates.
8. (Optional) Click Calibration Default Values to select different rating fields as the basis for initial worker placement.

   You can override the default values for:

Default Value	Report field Used if No Value Specified
Calibration: Overall Performance Rating.	Rating- Current
Calibration: Talent Based Performance Rating.	Talent Matrix Review Rating
Calibration: Potential.	Potential
Calibration: Row Section Rating.	n/a

Default Value	Report field Used if No Value Specified
Calibration: Column Section Rating.	n/a

Select another field from the Default value to choose prompt.

If you select *Calibration: Column Section Rating* or *Calibration: Row Section Rating* on the calibration nBox report, you must select:

- *Review Section Rating - Most Recent* as the default value.
- A Workday-delivered or tenanted section from the Employee Review Section Type prompt.

Note: Repeat Step 6 to map the new rating values to the calibration nBox report.

Example
You want to calibrate ratings from completed performance reviews, but your organization uses different employee review templates and rating scales to evaluate different groups of workers. To pinpoint which review template and rating scale is the basis for initially plotting workers on the calibration nBox report, override the default value for the Calibration: Overall Performance Rating field with Review Rating - Current Configured. This field finds the most recent review template and normalizes performance ratings based on your settings in the Maintain Employee Review Setup task.

Next Steps

- Launch the calibration program.
- To view the number of launched sessions, access the View Calibration Program report.
- To change or inactivate a calibration program, use the Edit Calibration Program task.
- To copy a calibration program so you can reuse it for another calibration event, use the Copy Calibration Program task.

Related Information
Concepts
Concept: Calibration nBox Placement on page 1725

Concept: Manage Calibration on page 1726

Reference
2022R2 What's New Post: Calibration

Steps: Set Up Calibration

Prerequisites

Make sure there's an employee assigned to every role on all organizations participating in calibration, such as:

- Managers as calibration participants.
- HR Partners as calibration facilitators.
- HR Administrators as calibration controllers.

Context

You can set up calibration to enable managers, HR partners, and talent administrators to evaluate your workers' performance and assess their growth potential within your organization. You can launch a calibration event by supervisory or custom organization.

Steps

1. (Optional) Determine if your calibration event is large enough that you need to work with the Workday Production Readiness team.

   See Workday Community: Production Readiness: Large Volume Events Best Practices for guidelines about opening a Production Readiness case.
2. Set Up Assignable Roles.

   Create assignable roles for:

   - Managers who use the Calibrate Team task in their My Tasks to calibrate their team members.
   - HR Partners who use the Facilitate Calibration task to calibrate workers.
   - Talent Administrators who use the Manage Calibration task to oversee the entire calibration process and complete the final calibration submission.
3. (Optional) Create Role-Based Security Groups.

   As you complete this task, create:

   - A security group hierarchy that is similar to your company's management chain to calibrate using a custom organization.
   - A role-based security group for managers so they can view employees in levels below their direct reports.
   - Role-based security groups for HR Partners and Talent Administrators.
4. (Optional) Configure Custom Organizations for Calibration on page 1710.
5. Edit Business Process Security Policies for these business processes:

Business Process	Recommendations
Launch Calibration	• Configure the initiating action on the *Launch Calibration* business process to include security groups that you intend to delegate any steps to. • Select the *Security Group* that you want to act as the calibration facilitator in the *View All* action under the Who Can Do Actions on Entire Business Process section. • Add users in the HR Administrator role to these security groups.
Worker Calibration	• Add security groups to actions in the Who Can Do Actions on Entire Business Process section. • Select the Security Group for the Rescind action. • Add users in the HR Partner role to these security groups.

6. Activate Pending Security Policy Changes.

7. From the related actions menu of the *Launch Calibration* business process, select Business Process > Edit Definition.
    a) Add *Shared Participation* as the Type and Specify the *Calibration Participation Details* step. You can only have 1 shared participation step in your business process definition.
    b) Select *Configure Participation* in the Calibration Participation Details step.
        - You can create custom *Launch Calibration* business process definitions for supervisory organizations and assign specific groups such as HR Administrators and HR Partners. You can create separate business process definitions for each organization type.
        - Select *Supervisory* or *Custom* from the Organization Type to Use prompt and specify 1 security group as the participant in the Group prompt. Participants in these security groups receive inbox notifications for the calibration events that they manage.
        - The Group prompt displays the role-based security groups with permission on the *Worker Data: Calibration* security domain.
    c) (Optional) Add an approval step after the *Launch Calibration* initiation step to approve the process initiation before starting calibration. Assign this step to someone with access to all employees in the calibration, such as an HR Administrator.
8. Create Calibration nBox Reports on page 1715.
9. Set Up Calibration nBox Reports on page 1716.
10. (Optional) Define Calibration Program Rules on page 1718.
11. Set Up Calibration Programs on page 1719.

    Select a calibration nBox report and configure the calibration program.
12. (Optional) Access the Maintain Calibration Flags task.

    Define the Calibration Flags that display in the calibration list view in the Calibrate Team task in your My Tasks.
13. (Optional) Set up an activity stream to support calibration.

    Access the Edit Tenant Setup - System task and select the *Activity Stream for Calibration* option in the Activity Stream Settings field. This setting enables calibration participants to enter and view comments on the worker for in-progress calibration events in the activity stream. Workday recommends that if you enable activity streams in calibration, you instruct managers to frequently refresh their Workday My Tasks.

    See Steps: Enable Activity Stream.

Result

Users in this security group receive the Calibrate Team tasks in their My Tasks to calibrate workers in their organization when you launch the calibration. Managers who manage multiple organizations receive:

- 1 instance of the Calibrate Team task, if the organizations have a hierarchical relationship where 1 is the parent and the other is subordinate.
- Individual instances of the Calibrate Team task, for the organizations that don't share the same parent organization.

Next Steps

Create Calibration nBox reports and configure them for calibration.

Related Information

Concepts

Concept: Shared Participation Step

Concept: Calibration Facilitation on page 1728

Concept: Best Practices for All Large-Scale Events

Tasks

Steps: Calibrate Talent and Performance Ratings on page 1709

Steps: Configure Business Process Definitions
Reference
Reference: Event-Specific Best Practices
2022R2 What's New Post: Calibration

Hide Calibration Workers

Prerequisites

- Create the calibration nBox report with the required filter and prompt conditions.
- Set up and launch the calibration program.
- Security: *Worker Data: Calibration* domain in the Performance Enablement or Talent Pipeline functional area.

Context

During calibration sessions, you can hide workers to prevent them from seeing their own or their peers' placement. This option enables a senior manager or HR Partners to host calibration sessions that focus on lower levels of the organization hierarchy while keeping direct reports out of view. Managers can then roll up the calibration session results for the entire organization to a superior level.

When you remove workers from view, they remain hidden for the duration of the calibration session, even if you save and come back later. The box counts exclude hidden workers.

Steps

1. Access the Calibrate Team task in your My Tasks or the Facilitate Calibration task, depending on your role in calibration.
2. Select Actions > Hide Workers.
3. Select the Workers to remove from view and click Hide Workers.

Next Steps

Unhide the workers before submitting calibration.

Related Information
Tasks
Steps: Calibrate Talent and Performance Ratings on page 1709
Create Calibration nBox Reports on page 1715

Concept: Calibration nBox Placement

Placing workers on the nBox report enables you to view, compare, and adjust employee talent and performance ratings. You can see both your direct and indirect reports in the calibration nBox report. You can't plot your indirect reports until after their direct manager plots them or the facilitator completes on behalf of the direct manager. Workday saves your work after every change, displays a timestamp, and updates both the nBox and list views.

The set of employees you see in the calibration nBox report and list views depends on the configuration of the Restrict Organization Level View field on the Create Calibration Program task. The larger the number of employees you can see, the more time it takes to display the nBox report.

All managers in the hierarchy below you must complete their calibration tasks before you can submit yours. Workday doesn't automatically send managers a notification to their My Tasks when managers below them submit the Calibrate Team task in their My Tasks. Set up custom notifications in the Launch Calibration BP definition to notify the participants when calibration tasks actions occur. Review worker placements directly in your calibration nBox report.

If you select the Allow Update of Assess Potential during Calibration check box on the Create Calibration Program task, use the list view to update employee potential attributes. If you use potential as an axis in Calibration, you can't evaluate it as a standalone field when you enable Assess Potential in Calibration.

If you select a calibration program for talent or performance reviews with calibration:

- On the Start Performance Review for Organization task, Workday pulls in the manager's overall rating and potential assessment (if configured) from the review into the calibration nBox report.
- On the Start Talent Review for Organization task, Workday pulls in the potential assessment from the review into the calibration nBox report.

Related Information
Examples
Example: Calibration nBox Placement on page 1730

Concept: Manage Calibration

Use the Manage Calibration report to account for changes in the organization hierarchy, workers, and role changes during the calibration process. Run this report as often as needed to capture the changes as they occur. If a change occurs that you don't want to account for in calibration, don't process the changes. You can submit calibration without processing the changes in the Manage Calibration report.

Workday runs the scheduled background job that updates the data for the Manage Calibration report 3 times a week early morning PST on Mondays, Wednesdays, and Fridays.

Organization and Worker Calibration

The Manage Calibration report displays the count of events in each calibration status and the changes made to the organization, workers, and roles. Drill into the counts to view more details for each status. Click Process Organizations, Process Workers, or Role Change to process the changes to reflect them in calibration. If you don't process the changes, calibration continues as if they didn't occur.

Calibration supports these worker changes with effective dates that occur on or after the date the calibration launched:

Worker Changes	Supported Organization Types
Hire an employee.	Supervisory.
Terminate an employee.	Supervisory and Custom.
Change an employee's job.	Supervisory.
Move an employee to a different organization.	Supervisory and Custom.
Assign an employee to an organization.	Custom organizations where Show Change in Organization Assignment is Yes on the Maintain Organization Types task.

Calibration supports these organization changes with effective dates that occur on or after the date the calibration launched:

Organization Changes	Supported Organization Types
Assign superior organization.	Supervisory and Custom where Allows Hierarchy is Yes on the Maintain Organization Types task.
Create subordinate organization.	Supervisory and Custom where Allows Hierarchy is Yes on the Maintain Organization Types task.
Divide organization.	Supervisory and Custom where Allows Hierarchy is Yes on the Maintain Organization Types task.

Organization Changes	Supported Organization Types
Inactivate organization.	Supervisory and Custom.
Activate organization.	Supervisory and Custom where Allows Hierarchy is Yes on the Maintain Organization Types task.
Assign included organization.	Custom organizations that are container organizations without workers.

Worker and organization changes that happen through events not listed are ineligible for processing in the Manage Calibration report. The Manage Calibration report doesn't account for rescinded worker or organization events after processing them.

When you process organization changes for a worker, Workday:

- Updates the Calibrate Team task.
- Creates, removes, or changes the task as required depending on whether the manager is already participating in calibration.

When you process worker changes in an organization, Workday:

- Adds or removes workers from their manager's Calibrate Team task as appropriate.
- Unprocessed workers remain in their previous manager's nBox.

Workday recommends you process organization and worker changes 1 step at a time. Example: Add an organization and then process the change, and then move workers into a new organization and process those changes. Performing multiple events first and then processing them can cause unexpected results.

If you launch calibration and an event occurs after launch and is later rescinded, the Manage Calibration report doesn't display the event. Example: If you launch calibration for Organization A, and you later move Worker1 to Organization C, but you later rescind the move, Workday doesn't account for the change in the Manage Calibration report. But if Worker2 is moved after you launch calibration, Workday will display the move when you later run the Manage Calibration report.

Reassign Calibration

If there's a role change with an effective date on or after launching calibration, you can reassign the Calibrate Team task to the new manager. In the Manage Calibration report, click Reassign Tasks to change the employee roles for calibration using the Manage Role changes under Calibration task. To manage role changes, you must be included in the *Business Process Administration* domain. You can only reassign My Tasks tasks to workers in the same security group that have a role on the organizations. This ensures that they calibrate the same workers.

Ad hoc Calibration

Workday recommends using the Process Workers button on the Manage Calibration report to add or remove workers ad hoc from in-progress calibration events. You can also use the report to override Calibration Program rules and Employee Review Template rules when adding or removing workers. To add workers ad hoc, they must be a part of the supervisory organization that's included in the calibration hierarchy.

When you add a worker ad hoc to an in-progress calibration event launched with a performance or talent review, Workday automatically creates a corresponding review for the worker. You can only add or remove workers who belong to the supervisory organization included in the calibration event.

If you remove a worker ad hoc from a calibration event with an in-progress performance or talent review, you must cancel their review.

You can't ad hoc add terminated workers back into an in-progress calibration event.

Note:

Workers terminated after calibration launches continue to display in the calibration event, enabling you to calibrate them.

Use the Manage Calibration report to remove terminated workers from appearing in all nBox reports.

Workday recommends running the Manage Calibration report frequently to prevent an accumulation of worker, organization, and role changes. Don't process the changes if you don't want the change reflected in the calibration event. Example: if a new hire is too new to calibrate.

Concept: Calibration Facilitation

Managers receive Calibrate Team tasks in their My Tasks and complete the calibration for their team members. Workday doesn't support managers delegating Calibrate Team tasks. HR Partners or other users can assist managers with in-progress calibration events by using the Facilitate Calibration task to:

- Plot employees in the nBox.
- Save faceted searches within the nBox.
- Complete calibration events on behalf of a manager.
- Send back an My Tasks item after pulling it forward.

Users can access the Facilitate Calibration task when they have:

- View All permission on the *Launch Calibration* business process security policy.
- View and Modify permission on the *Facilitate Calibration* security domain.

You can use role-based security groups (unconstrained) and role-based custom security groups in this domain.

When you access the Facilitate Calibration task:

- Only in-progress calibration events that contain at least 1 organization where you have a role display in the Calibration Event prompt.
- The organizations prompt displays the organizations that you have a role on for the selected calibration event.
- If the selected organization isn't on the hierarchy's lowest level, you can calibrate workers in the selected organization and its subordinates.
- The facilitator sees the nBox view for the selected organizations and has the ability to move employees' calibration placements.

Depending on the manager and hierarchy configuration, facilitators might see more organizations than they selected. If multiple organizations have the same manager where an organization is subordinate to the other, the facilitator always sees the employees for all organizations. This facilitator's nBox matches the manager's nBox. Create a facet to filter the workers on the nBox.

Example: To give Shelly, an HR Partner, facilitator access to her organization's calibration event, add her security group to:

- The *View All* action of the *Launch Calibration* business process security policy.
- The *Facilitate Calibration* security domain.

Calibrate Team Members

Use the Facilitate Calibration task to calibrate workers for an in-progress calibration in the selected organization.

You can drag and drop workers into the nBox view to calibrate them the same way managers would from the Calibrate Team task in their My Tasks. You can hide selected workers in calibration to prevent them from seeing their placement or their peers' placement during a calibration session.

Complete on Behalf of

Use the Facilitate Calibration task to pull forward individual calibration events for a subordinate organization 1 level below the selected organization, including the organization itself and its subordinates. Optionally, you can complete on behalf of all organizations, and their subordinate organizations, shown in the Calibration Status grid.

- Select the organization and click Complete on Behalf Of to complete on behalf of an individual organization.
- Select Complete on Behalf of All to complete all calibration events for the organizations listed, including subordinate events.

Pulling forward enables the facilitator to have full control over the calibration event and takes the Calibrate Team task out of the manager's My Tasks.

Send Back

You can use the Facilitate Calibration task to send calibration back to the supervisory organization 1 level below the current organization after pulling it forward. Sending the organization back includes the selected organization itself. You can only send back the selected calibration event, not including its subordinates. Facilitators can edit employee calibrations at any point before the controller submits the final calibration, including after the manager submits the calibration. You can't use the Facilitate Calibration task to submit calibration. The controller must submit from their calibration My Tasks item.

Related Information

Reference

The Next Level: Engaging Talent

Examples

Example: Calibration nBox Placement on page 1730

Concept: Calibration Results

Calibration is complete when the participants finish plotting employees in the nBox report for all of the organizations and the controller submits calibration. Completion occurs when:

- Workday writes the final calibration values to the workers and maps:
  - The Calibration: Potential value to the Potential report field.
  - The Calibration: Talent Based Performance Rating value to the Talent Matrix Review Rating report field.
  - The default report field specified in the calibration program.
- If the calibration event launches with an employee review, Workday adds a value based on your calibration nBox report configuration as the Calibrated Review Rating in the manager evaluation:
  - Calibration: Talent Based Performance Rating
  - Calibration: Overall Performance Rating

If you used these calibration fields, you must create calculated fields to retrieve the calibration values from the event:

- Calibration: Overall Performance Rating
- Calibration: Row Section Rating
- Calibration: Column Section Rating

Reporting

To view the final calibration values for employees, copy the Worker Calibration History and My Team's Calibration History reports (secured to the *Worker Data: Calibration* domain) to custom reports. If you have multiple types of calibration events with different axes values, each type requires its own custom version of these reports. Copy these reports to a custom report for each unique type of calibration event. Complete the nBox setup for each custom report.

Concept: Calibration Dashboard

The Calibration dashboard enables managers to track in progress calibration events for their organizations. This dashboard is secured to the *Management Dashboard: Calibration* domain in the System functional area. It provides these worklets:

- In Progress Calibration Status: Displays the current status of each Calibrate Team event for an in progress Calibration event. This report is intended for unconstrained roles, such as HR Administrator or Talent Administrator.
- My Team's Calibration History: Displays historical calibration values for your current direct reports for a completed Calibration event. This report is intended for managers.
- Worker Calibration History: Displays historical calibration values for workers for a completed Calibration event. This report is for unconstrained roles, such as HR Administrator or Talent Administrators.
- Worker Calibration Placement Trend: Displays the entire history of calibrated values from completed Calibration events for a specific worker.

The Dashboard Menu on the Calibration Dashboard also helps you to navigate quickly to relevant tasks, such as Facilitate Calibration, Manage Calibration, and Calibration Distribution.

You can use the Maintain Dashboards task to configure the Calibration dashboard. Managers can display it on the Home landing page for quick access.

Related Information
Tasks
Steps: Set Up Dashboards and Landing Pages

Example: Calibration nBox Placement

This example illustrates 1 way to calibrate employees in an nBox report.

Context

Bill, a manager, calibrates the performance and potential ratings for his 2 employees, Maria and Robert. Their initial ratings are:

- Maria: Performance = 4, Potential = Medium.
- Robert: Performance = 2, Potential = Low.

The nBox view has a 3 x 3 grid with performance on the vertical axis and potential on the horizontal axis.

Steps

1. Glenn, the HR partner, creates the calibration program mapping performance ratings to rows (the vertical axis) as:
    - 1-2 to the bottom row.
    - 3 to the middle row.
    - 4-5 to the top row.
2. The calibration program maps potential ratings to columns (the horizontal axis) as:
    - Low to the left column.
    - Medium to the middle column.
    - High to the right column.

    This places Maria in the top center box and Robert in the bottom left box.

3. During calibration, Bill keeps Maria in the same box, but moves Robert to the bottom center box to indicate higher potential.

Result

Based on the mappings defined in the calibration nBox report, Maria's performance and potential ratings remain the same. Robert's performance rating stays the same, but the potential rating changes to Medium after the controller submits calibration.

FAQ: Talent and Performance Calibration

- What determines which workers display in the Calibrate Team task?
- Can I launch multiple concurrent calibration events?
- Are there any calibration events that don't support worker or organization changes?
- Does calibration support reorganizations on the top-level organization?

What determines which workers display on the Calibrate Team task?	Workday displays workers on the Calibrate Team task based on the manager's contextual security. Facilitators can use the Facilitate Calibration report to view processed workers who move to a new organization. Contextual security still applies if the Manage Calibration report doesn't process the worker or organization move.
Can I launch multiple concurrent calibration events?	Yes, you can have multiple calibration events for supervisory or custom organizations in progress at a given time. However, you can only calibrate workers in 1 calibration event at a time.
Are there any calibration events that don't support worker or organization changes?	You can't change worker or organization assignments in calibration events initiated as part of a performance review (after launching the *Start Performance Review* business process).
Does calibration support reorganizations on the top-level organization?	No. Top-level organizations shouldn't experience any reorganizations during calibration.

Feedback

Setup Considerations: Anytime Feedback

You can use this topic to help make decisions when planning your configuration and use of anytime feedback. 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 Workday to enable anytime feedback for workers to give ad hoc unsolicited feedback to other workers.

Business Benefits

- Encourages workers to provide feedback to colleagues outside of formal employee reviews, fostering communication and teamwork.
- Enables workers to provide feedback to other workers outside of constrained roles for greater transparency in your organization.
- Enables workers to provide unsolicited feedback to include in employee reviews.

Use Cases

Managers can encourage their workers to use anytime feedback to recognize other workers' accomplishments or provide feedback for areas of improvement.

Workers can give unsolicited feedback to any other worker, including workers across different functions.

Questions to Consider

Questions	Considerations
How can you use anytime feedback to promote your company culture?	Anytime feedback can foster a corporate culture of openness and communication across roles and hierarchy. Example: Individual contributors can provide unsolicited feedback to managers in a different organization. If your company uses a more controlled and structured approach, such as enabling only managers to provide feedback, you might want to use only role-requested feedback.
How can you control confidentiality, privacy, and anonymity for anytime feedback?	Workday enables settings for privacy and confidentiality by default so that givers of anytime feedback can share their feedback with the feedback recipient or other workers. You can disable privacy and confidentiality settings so that feedback givers can't share their feedback. Workday also enables by default anonymous feedback, in which feedback givers can choose to display their name or remain anonymous. You can also disable anonymous feedback so that Workday always displays the names of feedback givers.
Do you want to pull anytime feedback into employee reviews?	You can configure employee review templates to include anytime feedback that's not private or confidential.

Recommendations

- Set up feedback notifications so that workers can inform other parties that they provided feedback.
- Encourage your workers to use feedback badges to promote positive recognition of their peers.
- To limit feedback reports from getting too long over time, create custom reports that report worker anytime feedback for a specific period on worker profiles. Example: Create a custom report that displays only anytime feedback given in the past year.
- When you configure anytime feedback options with intersection security groups, users in some groups might not be able to give or view anytime feedback. We recommend consulting Workday Community resources when using anytime feedback with intersection security.

Requirements

No impact.

Limitations

- You can't configure feedback templates for anytime feedback.
- When users give anytime feedback, the Give Feedback task provides a text field to enter feedback but you can't configure the *Give Feedback* business process to include questions or other help text.
- You can't prevent workers from giving anytime feedback to multiple recipients at the business process level. To prevent or discourage workers from giving anytime feedback to multiple recipients, set up condition rules to add a step or issue a validation message before they complete the task.
- Anytime feedback can be private, confidential, or anonymous when sent to a single recipient but not when sent to multiple recipients.
- Workday doesn't include anytime feedback on the View Worker History report for an employee.
- Workday doesn't support giving anytime feedback to terminated workers.
- The Anytime Feedback worklet on the Talent and Performance dashboard might not display correctly in mobile applications.

Tenant Setup

Use the Give Feedback notification type in the HCM section of the Edit Tenant Setup - Notifications task to enable users to notify other workers when they provide feedback.

Security

Configure these domains in the Performance Enablement functional area:

Domain	Considerations
Self-Service: Anytime Feedback	Enable self-service access for workers to provide and view anytime feedback.
Self-Service: Feedback	Enable workers to give and get feedback.
Worker Data: Anytime Feedback	Enable workers to view anytime feedback for another worker.
Worker Data: Confidential Feedback	Enable workers to view confidential anytime feedback about another worker.
Worker Data: Private Feedback	Enable workers to view private anytime feedback that's not visible to managers about another worker.

Business Process

Configure the *Give Feedback* business process in the Performance Enablement functional area to enable workers to provide anytime feedback.

Reporting

Reports or Dashboards	Considerations
Feedback on My Team report	Enables managers to view anytime feedback for their team members.

Reports or Dashboards	Considerations
Feedback Received report	Enables workers to view feedback they received for all feedback types, including anytime feedback. This report is also available on the worker profile.
Talent and Performance dashboard	Add the Anytime Feedback worklet so workers can view the anytime feedback they gave and received.

Integrations

Web Services	Considerations
Give Feedback	Enables you to import historical anytime feedback data from another Workday tenant into Workday.
Put Feedback Badge	Enables you to import, add, edit, and remove feedback badges.

Connections and Touchpoints

Features	Considerations
Employee Reviews	You can set up employee review templates to include anytime feedback in employee reviews.
Manager Insights Hub	Managers can use Manager Insights Hub to access information about feedback that their direct reports have received.
Workday Skills Cloud	Workday uses anytime feedback as a source for generating skills suggestions in Workday Skills Cloud.

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: Intersection Security Groups

Setup Considerations: Manager Insights Hub on page 2933

Tasks

Configure the Feedback Section on page 1630

Reference

Setup Considerations: Skills Cloud on page 1844

Setup Considerations: Requested Feedback

You can use this topic to help make decisions when planning your configuration and use of requested feedback. 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 provides 2 types of requested feedback:

- Role-requested feedback, which enables a worker to request feedback on other workers, including feedback for employee reviews. Role-requested feedback can be confidential but not private.
- Self-requested feedback, which enables workers to request feedback on themselves. Self-requested feedback can be private but not confidential.

Business Benefits

- Create specialized feedback templates for different purposes and events.
- Enable workers to take the initiative and solicit feedback on themselves.
- Use feedback to foster workers' personal and career development.

Use Cases

- Workers can request feedback on themselves from other workers and include the feedback in performance reviews.
- Managers can request feedback on their workers from other team members or other managers to include in performance reviews or development plans.
- Managers can request confidential feedback about workers to use in performance improvement plans and disciplinary actions.
- Administrators can create a specific feedback template for the end of a project, with specific questions tailored to gather information from members of the project. You can enable workers to request feedback on themselves from other workers.
- Administrators can create a specific feedback template for development, where workers request feedback on themselves. You can encourage the feedback provider to private feedback for candid and constructive input.
- Set up mass feedback events for large groups of workers.
- To obtain quantifiable feedback results, create questions with different answer types, including multiple choice multi-select, multiple choice single-select, date, and numeric.

Questions to Consider

Questions	Considerations
Who can initiate feedback on behalf of others?	You can set up your security domains so that designated employees such as managers can request feedback on behalf of others.
What groups of workers do you want to view confidential or private feedback?	You can assign security to specific groups such as HR partners and managers to view confidential or private feedback.

Recommendations

- Delete *Give Requested Feedback* events using the mass operation management Cancel Feedback Requests job to limit the size of your reports.
- Use care when securing domains for feedback notifications to prevent workers from seeing notifications they shouldn't see.
- To ensure that workers only see feedback intended for them, enable the confidential feedback options on the Maintain Feedback Setup task and have workers select it when providing confidential feedback.

- When setting up custom feedback notifications for the *Get Feedback on Worker* and *Get Feedback on Self* business processes, set up notifications for the *Give Requested Feedback* business process also to ensure that workers get notified at each step in the process.
- To indicate who can view feedback, provide help text for the *Get Feedback on Worker* and *Get Feedback on Self* business processes. Because these business processes are secured to different domains, the help text should include security information. The feedback provider can receive different types of feedback requests for the same person (both *Get Feedback on Worker* and *Get Feedback on Self*), and the help text can clarify who can view the feedback for each event.
- When you change confidential or privacy settings on your feedback business processes, update business process help text that states who can view feedback.
- Add help text to feedback templates to provide helpful tips and guide users through the feedback event.

Requirements

No impact.

Limitations

- Workday doesn't provide a way to limit the number of feedback providers.
- Workday doesn't indicate whether workers are providing anonymous role-requested or self-requested feedback. You can use a condition rule on business process help text to inform feedback providers whether their feedback is anonymous.
- Workday doesn't support feedback badges for role-requested and self-requested feedback. Workday supports feedback badges for anytime feedback only.
- Workday doesn't support hiding feedback from workers and showing feedback to managers on employee review templates. To ensure that only designated workers can view feedback, you can set all feedback for the *Get Feedback for Review* business process event as confidential.
- Workers can’t reassign a request to give feedback. Workday displays the Reassign Tasks action as supported on the *Give Requested Feedback* business process policy but has disabled the action.

Tenant Setup

Configure tenant-wide settings for requested feedback, including confidential and private feedback, on the Maintain Feedback Setup task.

Security

Configure these domains in the Performance Enablement functional area:

Domain	Considerations
Self-Service: Feedback	Enables workers to give and receive feedback.
Self-Service: Role Requested Feedback	Enables workers to view feedback that they request from other workers.
Self-Service: Self Requested Feedback	Enables workers to view feedback that they request on themselves.
Worker Data: Confidential Feedback	Enables workers to view confidential, role-requested feedback on other workers
Worker Data: Private Feedback	Enables workers to view private, self-requested feedback about themselves.
Worker Data: Role Requested Feedback	Enables workers such as managers to view requested worker feedback.

Domain	Considerations
Worker Data: Self Requested Feedback	Enables workers such as managers to view feedback that other workers request about themselves.

Business Processes

Business Processes	Considerations
Get Feedback on Self	Set up steps for self-requested feedback.
Get Feedback on Worker	Set up steps for role-requested feedback.
Give Requested Feedback	Enables workers to provide requested feedback. Although similarly named, the *Give Feedback* business process only applies to anytime feedback.

Reporting

Reports	Considerations
Feedback on My Team	Add to the Team Performance dashboard to enable managers to view role-requested feedback given to their team members.
Feedback Received	Use to view all feedback types received by a worker.

Integrations

Web Services	Considerations
Get Feedback Questions	Enables you to export feedback questions.
Put Feedback Question	Enables you to import questions for use in feedback templates.

Connections and Touchpoints

Requested feedback interacts with Manager Insights Hub. Managers can use Manager Insights Hub to access information about feedback that their direct reports have received. 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: Manager Insights Hub on page 2933

Steps: Set Up Feedback

Context

Workday has 3 types of feedback:

- Anytime Feedback: Unsolicited feedback associated with the *Give Feedback* business process.

- Feedback on Worker (role-requested feedback): Requested by another worker (typically a manager). Associated with the *Give Requested Feedback* subprocess for the *Get Feedback on Worker* business process.
- Feedback on Self (self-requested feedback): Requested by the worker. Associated with the *Give Requested Feedback* subprocess for the *Get Feedback on Self* business process.

You can use feedback for:

- Peer recognition.
- Performance reviews.
- Personal development.
- Ongoing career conversations.

Steps

1. Set Up Feedback Security on page 1739.
2. Set Up Feedback Business Processes on page 1740.
3. Set Up Confidential, Private, and Anonymous Feedback Options on page 1741.

   Access the Maintain Feedback Setup task to configure settings for confidential, private, and anonymous feedback.
4. (Optional) Set Up Anytime Feedback Notifications on page 1756.
5. Activate Pending Security Policy Changes.
6. (Optional) Edit Business Processes.

   Add a *Get Feedback from Review* step to the *Start Performance Review* or *Start Development Plan* business process to request feedback as part of reviews. The *Get Feedback from Review* step behaves the same as the *Get Feedback on Worker* business process.
7. (Optional) Steps: Set Up Workteams.

   Set up workteams so that workers can select from the *My Workteams* option in the Workers prompt or the From Workers prompt when giving or requesting feedback.
8. (Optional) Steps: Set Up Profiles and Profile Groups.

   Add these reports to the worker profile or to the Performance or Feedback profile groups:

   - Feedback Given
   - Feedback on My Team
   - Feedback Received
   - Feedback Requested
   - View Feedback Received
9. (Optional) Add the *Get Feedback* action to the My Team and Performance worklets.

   See Steps: Set Up Dashboards and Landing Pages.
10. Configure feedback templates used in role-requested and self-requested feedback.

    See Steps: Configure Feedback Templates on page 1750.
11. (Optional) Add and configure the Feedback section in your employee review templates.

    See Steps: Create Employee Review Templates on page 1627.
12. (Optional) Access the Configure Talent Tags task.

    Configure *Competency* as a Relates To prompt option for feedback.

    Relate feedback questions in requested feedback to a specific competency.

    Security: *Set Up: Talent* domain in the Talent Pipeline functional area.

13. (Optional) Access the Maintain Feedback Badges task.

    Set up feedback badges using any of the Workday-delivered badge icons. You can disable badges on the Maintain Feedback Setup task. Workday displays feedback badges on only the Give Feedback task.

    Security: *Set Up: Employee Reviews* in the Performance Enablement functional area.

Result

Your workers can now:

- Provide and receive feedback.
- Request feedback for themselves or other workers.
- View another worker's feedback.
- Relate feedback to competencies and include this information in employee reviews.

Employees on a leave of absence can't provide or receive feedback if an administrator enables the *Talent Effect* option in the leave type. In this case, a worker can't select the employee on leave of absence as a feedback provider or feedback recipient for these tasks:

- Get Feedback on Self
- Get Feedback on Worker
- Ask Others for Feedback on Self
- Ask Others for Feedback on Worker
- Revise Get Feedback
- Review Get Feedback on Self
- Review Get Feedback on Worker

Related Information

Reference

2021R1 What's New Post: Quantifiable Feedback

Set Up Feedback Security

Context

Set up domains in the Performance Enablement functional area to control who can participate in different types of feedback.

Workday enables confidential feedback and private feedback by default. Add workers to the *Worker Data: Confidential Feedback* domain and the *Worker Data: Private Feedback* domain to enable them to view confidential feedback or private feedback. Disable confidential feedback and private feedback using the Maintain Feedback Setup task.

Steps

1. Set up security for the *Self-Service: Feedback* domain in the Performance Enablement functional area for all feedback types.
2. Set up security for these domains for anytime feedback.

    - *Self-Service: Anytime Feedback*
    - *Worker Data: Anytime Feedback*
    - *Worker Data: Confidential Feedback*
    - *Worker Data: Private Feedback*
    - (Optional) *Self-Service: Edit Feedback*

3. Set up security for these domains for role-requested feedback.
    - *Self-Service: Role Requested Feedback*
    - *Worker Data: Role Requested Feedback*
    - *Worker Data: Confidential Feedback*
4. Set up security for these domains for self-requested feedback.
    - *Self-Service: Self Requested Feedback*
    - *Worker Data: Self Requested Feedback*
    - *Worker Data: Private Feedback*

Next Steps

Set up feedback business processes.

Related Information

Tasks

Edit Domain Security Policies

Reference

Reference: Feedback Security Domains on page 1760

Set Up Feedback Business Processes

Prerequisites

Security: *Self-Service: Feedback* domain in the Performance Enablement functional area.

Context

Configure feedback business processes and their security policies in the Performance Enablement functional area.

Steps

1. Configure the *Give Feedback* business process for anytime feedback.

    (Optional) Enable workers to edit feedback given to others within a 1-hour time frame from when they originally submitted it. Configure the *Give Feedback* business process by adding the Employee as Self security group to the *Self-Service: Edit Feedback* domain and *Edit Feedback* initiating action in the business process security policy.

    If you have condition rules on the *Give Feedback* business process, set up similar condition rules for the *Give Feedback to Multiple Recipients* business process.
2. Configure these business processes for role-requested feedback:
    - *Get Feedback on Worker*
    - *Give Requested Feedback*

    You can enable contingent workers to provide feedback. Configure security groups on the initiating action of the policy for the *Give Requested Feedback* business process.
3. Configure these business processes for self-requested feedback:
    - *Get Feedback on Self*
    - *Give Requested Feedback*
4. (Optional) Enable workers to ask additional workers to participate in a previously submitted Get Feedback on Self or Get Feedback on Worker request. Configure the *Get Feedback on Self* and *Get*

Feedback on Worker business process security policies and add the Employee As Self security group to the Ask Others for Feedback initiating action.

When you configure this initiating action, Workday displays the Ask Others button on the Feedback Requested report. You can configure the Feedback Requested report to be included on the worker profile.

Next Steps

Set up options for giving and getting feedback, and configure feedback templates.

Related Information

Tasks

Edit Business Processes

Reference

Reference: Feedback Business Processes on page 1761

Examples

Example: Condition Rule to Prevent Feedback to Multiple Recipients on page 1763

Confidential, Private, and Anonymous Feedback

Set Up Confidential, Private, and Anonymous Feedback Options

Prerequisites

Security: These domains in the Performance Enablement functional area:

- *Self-Service: Feedback*
- *Worker Data: Confidential Feedback*
- *Worker Data: Private Feedback*

See Set Up Feedback Security.

Context

Workday enables anonymous, confidential, and private feedback by default. You can control which visibility option workers can select on feedback tasks. Use the Maintain Feedback Setup task to control settings for anonymous, confidential, and private feedback.

Changing these settings only affects future feedback events, and doesn't change the anonymity, confidentiality, or privacy of existing feedback. Example: You disable confidential feedback. Future feedback isn't confidential but existing confidential feedback stays confidential.

Steps

1. Access the Maintain Feedback Setup task.
2. As you complete the Give Feedback section, consider:

Option	Description
Default: Give Feedback to Confidential	Defaults to confidential feedback on Anytime Feedback. For Give Requested Feedback tasks, select the *Enable Confidential Feedback for Give Requested Feedback* option to default to confidential feedback.

Option	Description
	Workers can still select Share with others for both Anytime Feedback and Give Requested Feedback tasks.
Disable Confidential Feedback	Prevents workers from providing confidential feedback on the Give Feedback task for anytime feedback. When you select this check box, Workday: • Hides the Don't share with [*feedback recipient*] check box on the Give Feedback task. • Allows workers to view all future feedback submissions about themselves. • Hides existing confidential feedback from the feedback recipient but displays it to users with access on the *Worker Data: Confidential Feedback* security domain.
Disable Anonymity	Prevents workers from giving or requesting anonymous feedback in these business processes: • *Give Feedback* • *Get Feedback on Worker* • *Get Feedback on Self* When you select this check box, Workday: • Hides the Show my name? check box on the Give Feedback task. • Hides the Make Feedback Anonymous check box on the Get Feedback on Worker and Get Feedback on Self tasks and the Show my name? check box on the *Give Requested Feedback* step. • Displays the names of feedback providers in future feedback submissions. • Hides feedback providers' names in existing anonymous feedback.
Disable Decline Feedback	Removes the option to decline feedback requests sent through the *Get Feedback on Worker* and *Get Feedback on Self* business processes.
Disable Private Feedback	Prevents workers from providing private feedback on the Give Feedback task for anytime feedback. When you select this check box, Workday: • Hides the Share with [*feedback recipient*] check box on the Give Feedback task.

Option	Description
	• Displays existing private feedback to users with access on the *Worker Data: Private Feedback* security domain.
Enable Confidential Feedback for Give Requested Feedback	Enables feedback providers to make their feedback confidential when responding to a *Give Requested Feedback* My Tasks task as part of the *Get Feedback on Worker* business process. When you select this check box, Workday: • Displays the Don't share with [*feedback recipient*] check box in the Give Requested Feedback task. • Automatically selects the Disable Confidential Feedback check box in the Get Feedback section of the Maintain Feedback Setup task.
Enable Private Feedback for Give Requested Feedback	Enables feedback providers to mark their feedback as private when responding to a *Give Requested Feedback* My Task item as part of the *Get Feedback on Self* business process. When you select this check box, Workday: • Displays the Share with [*feedback recipient*] check box in the *Give Requested Feedback* step. • Automatically checks the Disable Private Feedback check box in the Get Feedback section of the Maintain Feedback Setup task.

3. As you complete the Get Feedback section, consider:

Option	Description
Disable Confidential Feedback	Prevents feedback requestors from requesting confidential feedback from feedback givers on the Get Feedback on Worker task. When you select this check box, Workday: • Hides the Don't share with [*feedback recipient*] and Share with others check boxes on the Get Feedback on Worker task. • Allows workers to view all future feedback submissions about themselves. • Hides confidential feedback to the feedback recipient, but allows users with access to the *Worker Data: Confidential Feedback* security domain to view it.
Disable Private Feedback	Prevents workers from requesting private, peer-to-peer feedback on the Get Feedback on Self task. When you select this check box, Workday:

Option	Description
	• Hides the Share with me and Share with others check boxes on the Get Feedback on Self task. • Displays existing private feedback to users secured to the *Worker Data: Private Feedback* security domain.
Default: Get Feedback on Worker is Confidential	When you select this check box, Workday automatically selects the Don't share with [*feedback recipient*] check box in the Feedback Sharing section. The feedback requestor can still select the Share with Others check box.

Result

Depending on your settings, your feedback requestors and feedback givers can or can't request or provide anonymous, confidential, or private feedback.

Concept: Confidential Feedback

Workday enables you to configure feedback visibility using domain security policies and the Maintain Feedback Setup task. Confidential feedback and private feedback are mutually exclusive; feedback can be 1 or the other but not both. Confidential feedback can be anonymous.

Everyone with access on the *Worker Data: Confidential Feedback* domain can view confidential feedback, except the feedback subject. Managers typically use confidential feedback for career development purposes. The ability to give or request confidential feedback is only available on these business processes:

- *Give Feedback*
- *Get Feedback on Worker*

To enable confidential feedback, add roles to the *Worker Data: Confidential Feedback* security domain in the Performance Enablement functional area. Example: Add roles such as managers and HR partners.

Use the Maintain Feedback Setup task options to determine who can request confidential feedback on the *Get Feedback on Worker* business process. These options are mutually exclusive. Do 1 of these actions:

- Clear the Disable Confidential Feedback check box in the Get Feedback section so the feedback requestor selects whether the feedback is confidential.
- Select the Enable Confidential Feedback for Give Requested Feedback check box in the Give Feedback section so the feedback giver selects whether the feedback is confidential.

Feedback Sharing

Depending on your settings for confidential feedback, Workday displays different Feedback Sharing options for the feedback requestor and feedback provider. Workday displays feedback sharing options for the Give Feedback task only when giving feedback to a single recipient. When giving feedback to multiple recipients, Workday doesn't display feedback sharing options.

This table illustrates the effects of the Give Feedback options on the Maintain Feedback Setup task.

Check box Selection	Feedback Task or Step	Feedback Sharing Options Displayed
Disable Confidential Feedback cleared	Give Feedback task	Feedback provider (single recipient only): • Don't share with [*recipient*]

Check box Selection	Feedback Task or Step	Feedback Sharing Options Displayed
		• Share with [*recipient*] • Share with others
Disable Confidential Feedback selected	Give Feedback task	Feedback provider (single recipient only): • Share with [*recipient*] • Share with others
Both: • Disable Confidential Feedback selected • Disable Private Feedback selected	Give Feedback task	Feedback provider: no options displayed.
Enable Confidential Feedback for Give Requested Feedback cleared	Give Requested Feedback step	Feedback provider: no options displayed
Enable Confidential Feedback for Give Requested Feedback selected	Give Requested Feedback step	Feedback provider: • Don't share with [*recipient*] • Share with others

This table illustrates the effects of the Get Feedback options on the Maintain Feedback Setup task.

Check box Selection	Feedback Task or Step	Feedback Sharing Options Displayed
Disable Confidential Feedback cleared	Get Feedback on Worker	Feedback requestor: • Don't share with [*recipient*] • Share with others
Disable Confidential Feedback selected	Get Feedback on Worker	Feedback requestor: no options displayed

You're an HR Administrator at Global Modern Services and want to use confidential feedback to drive workers' career development. You clear the Disable Confidential Feedback check box on the Get Feedback section of the Maintain Feedback Setup task. You then add the Manager security group to the *Worker Data: Confidential Feedback* security domain and the business process security policy for *Get Feedback on Worker*. Managers at GMS can now request confidential feedback about their direct reports using the Get Feedback on Worker task. Their direct reports can't see confidential feedback on themselves.

Aparna is an engineer at Global Modern Services. Aparna's manager, Joe, wants to hear about Aparna's performance on a recent project she's been working on with Irene, a different manager. Joe doesn't want Aparna to see the confidential feedback. Joe uses the Get Feedback on Worker task to request feedback about Aparna from Irene. In the request, Joe selects the Feedback Sharing option not to share Irene's feedback with Aparna.

Related Information

Tasks

Steps: Set Up Feedback on page 1737

Examples

Example: Set Up Confidential Role-Requested Feedback on page 1748

Concept: Private Feedback

Workday enables you to configure feedback visibility using domain security policies and the Maintain Feedback Setup task. Confidential feedback and private feedback are mutually exclusive; feedback can be 1 or the other but not both. Private feedback can be anonymous.

The feedback recipient, the feedback provider, and users with access on the *Worker Data: Private Feedback* domain can view private feedback. Workers typically use private feedback to give peer-to-peer feedback not visible to the recipient's manager. The ability to give or request that private feedback is only available on these business processes:

- *Give Feedback*
- *Get Feedback on Self*

Add roles, such as HR Partners and HR Administrators, to the *Worker Data: Private Feedback* domain in the Performance Enablement functional area to enable them to view private feedback. To ensure that managers can't see peer-to-peer feedback, don't add managers to this domain.

On the *Get Feedback on Self* business process, the Maintain Feedback Setup task option you select determines who can request private feedback. These options are mutually exclusive. Do 1 of these actions:

- Clear the Disable Private Feedback check box in the Get Feedback section so the feedback requestor selects whether the feedback is private.
- Select the Enable Private Feedback for Give Requested Feedback check box in the Give Feedback section so the feedback provider selects whether the feedback is private.

Feedback Sharing

Depending on your settings for private feedback, Workday displays different Feedback Sharing options for the feedback requestor and feedback provider. Workday displays feedback sharing options for the Give Feedback task only when giving feedback to a single recipient. When giving feedback to multiple recipients, Workday doesn't display feedback sharing options.

This table illustrates the effects of the Give Feedback options on the Maintain Feedback Setup task.

Check box Selection	Feedback Task or Step	Feedback Sharing Options Displayed
Disable Private Feedback cleared	Give Feedback task	Feedback provider (single recipient only): • Don't share with [*recipient*] • Share with [*recipient*] • Share with Others
Disable Private Feedback selected	Give Feedback task	Feedback provider (single recipient only): • Don't share with [*recipient*] • Share with others
Both: • Disable Confidential Feedback selected • Disable Private Feedback selected	Give Feedback task	Feedback provider: no options displayed
Enable Private Feedback for Give Requested Feedback cleared	Give Requested Feedback step	Feedback provider: no options displayed

Check box Selection	Feedback Task or Step	Feedback Sharing Options Displayed
Enable Private Feedback for Give Requested Feedback selected	Give Requested Feedback step	Feedback provider: Don't share with [*feedback recipient*]

This table illustrates the effects of the Get Feedback options on the Maintain Feedback Setup task.

Check box Selection	Feedback Task or Step	Feedback Sharing Options Displayed
Disable Private Feedback cleared	Get Feedback on Self task	Feedback requestor: • Share with Me • Share with others
Disable Private Feedback selected	Get Feedback on Self task	Feedback requestor: no options displayed

You're an HR Administrator at Global Modern Services and want to use private feedback to drive workers' career development. You clear the Disable Private Feedback check box in the Get Feedback section of the Maintain Feedback Setup task. You then add the Employee as Self security group to the business process security policy for *Get Feedback on Self*. To encourage private, peer-to-peer feedback, you don't secure the Manager security group to the *Worker Data: Private Feedback* security domain. Employees at GMS can now request private feedback about themselves using the Get Feedback on Self task. Employees' managers can't see private feedback their direct reports request about themselves.

Aparna is an engineer at Global Modern Services. After completing a project, Aparna wants to request private feedback about herself that her manager, Joe, can't see. Aparna uses the Get Feedback on Self task to request feedback about herself from Sue, one of his project teammates. In the request, Aparna selects the *Share with me* option in the Feedback Sharing section so that the feedback is private and Joe can't see the feedback.

Related Information

Tasks

Steps: Set Up Feedback on page 1737

Examples

Example: Set Up Private Self-Requested Feedback on page 1749

Concept: Anonymous Feedback

Workday enables workers to provide anonymous feedback. Feedback providers or requestors can select whether or not Workday displays the feedback provider's name alongside their feedback. You can give or request anonymous feedback on these business processes:

- *Get Feedback on Worker*
- *Get Feedback on Self*
- *Give Feedback*

Anonymous feedback can be private or confidential, meaning feedback is only visible by certain users and Workday doesn't display the feedback provider's name.

When feedback is anonymous, Workday replaces the requestor's or feedback provider's name with *Anonymous* in reports. When you disable anonymous feedback using the Maintain Feedback Setup task, Workday displays the requestor's or provider's name in future feedback events.

You're an HR Administrator at Global Modern Services and want to use anonymous feedback to drive workers' career development. On the Maintain Feedback Setup task, on the Give Feedback section clear the Disable Anonymity check box. Employees at GMS can now give or request anonymous feedback. If an employee gives anonymous feedback, no one will know that the employee gave the feedback. If an employee requests anonymous feedback on another worker or themselves, Workday won't display the feedback giver's name.

Mike is an engineer at Global Modern Services. After completing a project, Mike wants to give constructive feedback to his teammate, Mary, but wants it to be anonymous. Mike uses the Give Feedback task to give anonymous feedback to Mary. In the request, Mike clears the check box in the Show my name? section so that Anonymous displays on the feedback instead of Mike's name. Mike then selects the *Share with Mary* option under the Feedback Sharing section.

Related Information
Tasks
Steps: Set Up Feedback on page 1737

Example: Set Up Nonconfidential and Nonprivate Anytime Feedback

This example illustrates how to set up the Give Feedback task so that workers can give anytime feedback that's nonconfidential and nonprivate.

Context

As an HR administrator, you want to foster communication among work teams by enabling workers to provide anytime feedback that's always nonconfidential and nonprivate. You want Workday to always display the feedback givers' names, and you want to create a new badge that workers can use when giving feedback to teammates who display environment consciousness.

Prerequisites

Set up anytime feedback notifications to populate the Workers to Notify field of the Give Feedback task. See Set Up Anytime Feedback Notifications on page 1756.

Configure the *Give Feedback* business process in the Performance Enablement functional area.

Security: These domains in the Performance Enablement functional area:

- *Self-Service: Feedback*
- *Self-Service: Anytime Feedback*
- *Worker Data: Anytime Feedback*

Steps

1. Set up the badges that workers can use to assign to feedback:
    a. Access the Maintain Feedback Badges task.
    b. Click the + icon to add a row, and enter these values:

Name	Icon
Environment	*icon-resourceful*

2. Access the Maintain Feedback Setup task and select these check boxes to enable workers to provide feedback that's nonanonymous, nonconfidential, and nonprivate:
    - Disable Anonymity
    - Disable Confidential Feedback
    - Disable Private Feedback

    Clear all other check boxes in the Give Feedback section.

Example: Set Up Confidential Role-Requested Feedback

This example illustrates how to enable workers to request confidential feedback about another worker.

Context

As an HR administrator, you want to enable managers to request confidential feedback about another worker for sensitive issues. You want the feedback requestor, but not the feedback giver, to be able to select to submit the feedback confidentially. You want only managers and HR administrators to view confidential feedback.

When a manager or HR administrator initiates the Get Feedback on Worker task, they can select the Don't Share with [*Feedback Recipient*] check box, and the manager can require that the feedback is confidential. When the feedback giver provides feedback, Workday doesn't provide the option to share it with the feedback recipient.

Prerequisites

Configure these business processes in the Performance Enablement functional area:

- *Get Feedback on Worker*
- *Give Requested Feedback*

Security: These domains in the Performance Enablement functional area:

- *Self-Service: Feedback*
- *Self-Service: Role Requested Feedback*
- *Worker Data: Role Requested Feedback*

Steps

1. Add groups for managers and HR administrators to the *Worker Data: Confidential Feedback* domain so they can view the confidential feedback.
2. Access the Maintain Feedback Setup task.
3. In the Give Feedback section, leave the Enable Confidential Feedback for Give Requested Feedback check box unchecked.

   When you select this check box, the feedback requestor can't set the feedback as confidential. The feedback giver, not the feedback requestor, selects whether the feedback is confidential at the *Give Requested Feedback* business process step.
4. In the Get Feedback section, leave the Disable Confidential Feedback check box unchecked.
5. Select the Default: Get Feedback on Worker is Confidential check box.

   When you enable this option, Workday automatically selects the option to not share feedback with the feedback recipient, meaning the feedback is confidential. Feedback requestors can clear this check box to share the feedback with others.

Example: Set Up Private Self-Requested Feedback

This example illustrates how to set up the Get Feedback on Self task so that workers can request private feedback about themselves.

Context

As an HR administrator, you want to enable workers to request private feedback about themselves. You also want to prevent the feedback giver from sharing that feedback with others.

Prerequisites

Configure these business processes in the Performance Enablement functional area:

- *Get Feedback on Worker*
- *Give Requested Feedback*

Security: These domains in the Performance Enablement functional area:

- *Self-Service: Feedback*
- *Self-Service: Self Requested Feedback*
- *Worker Data: Private Feedback*

Steps

1. Set up a default template that workers can use when asking for private feedback:
    a. Access the Create Feedback Template task, and enter these values:

Type	*Feedback on Self*
Name	*Self-Requested Feedback Template*

    b. In the Questions grid, click the + icon to add a row and select these values:

Question	Relates To
How can I be a better team member?	Teamwork (Competency)
What is the 1 area or skill that I should focus on improving?	Job Competence (Competency)

2. Enable private feedback in the feedback setup:
    a. Access the Maintain Feedback Setup task.
    b. In the Give Feedback section, clear these check boxes:
        - Disable Private Feedback
        - Enable Private Feedback for Give Requested Feedback
    c. In the Get Feedback section, clear the Disable Private Feedback check box.
    d. In the Default Templates section, select the *Self-Requested Feedback Template* in the Feedback on Self field.
3. Provide instructions to your workers that when initiating the Get Feedback on Self task, select the *Share with me* option to ensure that the feedback is private.

Feedback Templates

Steps: Configure Feedback Templates

Context

You can use feedback templates to get and give specific and consistent feedback on job performance by adding questions you create. You can create 3 types of feedback templates:

- Feedback for Review. Available on the Feedback Template prompt in the Get Feedback task when you include the *Get Feedback on Review* step in performance reviews or development plans.
- Feedback on Self. Available on the Get Feedback on Self task.
- Feedback on Worker. Available on the Get Feedback on Worker task.

Steps

1. Create and Manage Feedback Questions on page 1752.

    Create a library of questions that you can use in your feedback templates.
2. Create and Manage Feedback Templates on page 1753.
3. Set Up Feedback Template Rules and Defaults on page 1754.

Result

Workday populates these tasks with the questions defined in the default templates if configured on the Maintain Feedback Setup task:

- Get Feedback on Self.
- Get Feedback on Worker.

Steps: Set Up AI-Generated Feedback Suggestions

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

You can set up AI-generated suggestions for workers providing requested feedback to write more effective and actionable feedback by providing guidance based on the Situation-Behavior-Impact (SBI) framework. This only applies to text-based questions within a feedback template or ad hoc feedback questions. Workday reviews the feedback provider’s content to identify areas where the feedback can be improved. The worker maintains full control of their feedback responses.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.

   Select the HCM ML Features and Third Party Connectors GA service in the Innovation Services and Data Selection Opt-In report.
2. Access the Maintain Feedback Setup task and select Enable Generative AI for Feedback Suggestions.
3. Create and Manage Feedback Templates

   Set up your feedback template and select which text-based questions you want to provide feedback providers AI-generated support.

4. Edit Manage: AI-Generated Feedback Suggestions domain in the Performance Enablement and Worker Profile and Skills functional areas to enable workers to access AI-generated suggestions for requested feedback events in My Tasks.

Result

If a user has access to AI-generated feedback suggestions, Workday displays the Suggest Response Improvements button for requested feedback in My Tasks.

Example

Next Steps

Create and Manage Feedback Questions

Prerequisites

Security: *Set Up: Employee Reviews* domain in the Performance Enablement functional area.

Context

The Manage Feedback Questions task enables you to create a library of questions for feedback templates that are used for requested feedback and feedback for employee reviews.

To generate both qualitative and quantifiable feedback, you can create questions with these answer types:

- Text.
- Multiple choice single-select.
- Multiple choice multi-select.
- Date.
- Number.

Steps

1. Access the Maintain Question Tags task.

   Create question tags to associate feedback questions to.
2. Access the Manage Feedback Questions task.
3. Click Create New Question.

   When you create a question, consider:

Option	Description
Question Body	You can format your question body with rich text options.
Possible Answer	For each multiple choice question, enter 2 to 25 options. Each possible answer must be unique.
Score	For multiple choice questions, you can add a Score beside each Possible Answer. Scores can be any positive or negative integer. Workday calculates the total score for completed feedback questions by adding the integers for the selected answers.

Option	Description
Question Tags	You can associate multiple tags with a question.

4. (Optional) Click Edit Question to update the question.

   If the question is used in a feedback template, you can edit the Question Name and Question Tags only. If the question isn't used in a feedback template, you can edit all question attributes.
5. Click the number in the Usage column of the Manage Feedback Questions report to find out what templates currently use the question.
6. To delete a question, select Delete Question from the Edit Question drop-down.

   You can only delete questions that haven't been used in a feedback event (marked No in the Used in Feedback column).

Result

You can add your questions to feedback templates.

Example

You can have a question that's not being used in a feedback template but you're unable to delete it. You can create a question, add it to a template and use it in a feedback event, and then later remove the question from the template. In this case, the Usage column indicates zero and the Used in Feedback column indicates Yes. Although the Usage column indicates that the question isn't currently used in a template, you can't delete the question because it's been used in a past feedback event.

Related Information

Reference

2021R1 What's New Post: Quantifiable Feedback

Create and Manage Feedback Templates

Prerequisites

Create feedback questions to add to a template. See Create and Manage Feedback Questions.

Security: *Set Up Employee Reviews* domain in the Performance Enablement area.

Context

When you use a feedback template, you can add and group questions that you create for your organization. You can create 3 types of feedback templates:

- Feedback for Review
- Feedback on Self
- Feedback on Worker

Steps

1. Access 1 of these tasks:
   - Create Feedback Template to create a new template.
   - Configure Feedback Template to update an existing template.
2. As you complete this task, consider:

Option	Description
Lock Template	Select the check box to ensure that users can't add, change, or delete questions in feedback requests.

Option	Description
	If you leave a template unlocked, a feedback requestor can change the content of the question body in text, date, and numeric questions. If you translate questions in an unlocked template, feedback requesters can change the content, causing inconsistencies with the original translation. Workday doesn't retranslate updated questions in unlocked feedback templates.
Inactive	Select the check box when you don't want to use the template in future feedback events. You can't update an inactive template using the Maintain Feedback Setup task or assign the template to a condition rule.
Template Help Text	Create help text to display in *Give Requested Feedback* events. Workday displays business process help text first when you create both business process help text and feedback template help text.

3. Add questions and competencies to the template on the Questions grid.

   Select a competency relating to a feedback question from the Relates To prompt. Feedback on questions related to a competency display on the manager evaluation step for an employee review.

Result

Workers can select the template when they request feedback.

Next Steps

Set up default feedback templates and condition rules to determine which templates apply to specific groups.

Set Up Feedback Template Rules and Defaults

Prerequisites

Create feedback templates. See Steps: Configure Feedback Templates.

Security: *Set Up Employee Reviews* domain in the Performance Enablement area.

Context

You can set up condition rules to control which feedback templates workers in different groups, such as regions or countries, can select from. You can set up default feedback templates or require workers to use specific templates in feedback events. Example: Create a condition rule for a feedback template that takes account of privacy regulations affecting European workers.

Steps

1. Access the Maintain Feedback Setup task.
2. (Optional) To require workers to use feedback templates, select 1 or more options from the Require Feedback Template prompt.

   When you require feedback templates, workers can't add ad hoc questions to a feedback request.

3. (Optional) Select default feedback templates from the Feedback on Self or Feedback on Worker prompts.

   Workday displays the default feedback template on the feedback request, but workers can select a different template, where available. If you don't require a feedback template, the worker can clear the default feedback template and add other questions instead.
4. Set up condition rules for *Get Feedback on Self* and *Get Feedback on Worker* events.

   In the Condition Rule field, select an existing condition rule or click the *Create Feedback on Self Template Condition Rule* or *Create Feedback on Worker Template Condition Rule* option.
5. On the Get Feedback on Self or Get Feedback Worker grid, create, or update a condition rule to determine which workers or groups can use the template.

   Set your rules to control which workers or groups can use the template. Assign the feedback template to the condition rule in the table.

   You can assign more than 1 feedback template to a condition rule. When you create multiple condition rules, add each rule in the order you want Workday to process the rule. Workday evaluates each rule in the table and initiates the first rule that meets the condition.

Result

When a worker initiates a *Get Feedback on Self*, *Get Feedback on Worker*, or *Feedback from Review* step, Workday displays the configured templates and options.

If you create condition rules and also select a default template, when the criteria match the condition rule, Workday displays the templates specified in the condition rule. When the criteria don't match, Workday displays the default template, but workers can select other active templates from the Feedback Template prompt drop-down. The precedence of conditional rule criteria also applies to mass operation feedback events, even when you specify a template in the Mass Operation Management task.

Example

You create a Get Feedback on Worker condition rule that applies to workers in Europe only and assign 2 feedback templates customized for Europe to it. When a worker in Europe initiates a Get Feedback on Worker request, Workday displays the relevant 2 feedback templates.

Related Information

Tasks

Create Business Process Condition Rules

Reference

2021R2 What's New Post: Rules Based Defaulting of Feedback Templates

Example: Create Condition Rules for a Feedback Template

This example illustrates how to set up condition rules for a feedback template.

Context

As an HR administrator, you want to set up a Feedback on Worker template specifically for workers in Australia. You want to set up a condition rule so that feedback givers are presented only with this template when providing feedback on workers based there.

Steps

1. Set up a feedback template for Australian workers.
   a) Access the Create Feedback Template task, and enter these values:

Type	*Feedback on Worker*

Name	Feedback for Australian Workers

b) Select Lock Template to prevent workers from adding or editing questions.
c) Enter instructions in the Template Help Text field.
d) In the Questions grid, click the + icon to add questions to the template specifically for workers in Australia.
e) Click OK.

2. Set up the global feedback settings that will be applied to your template.
   a) Access the Maintain Feedback Setup task.
   b) In the Give Feedback section, select these options to enable feedback givers to select whether feedback is confidential or private:
      - Enable Confidential Feedback for Give Requested Feedback
      - Enable Private Feedback for Give Requested Feedback
   c) In the Get Feedback section, select the *Feedback on Worker* option in the Require Feedback Template field.
   d) In the Default Templates section, clear the Feedback on Worker field.
3. Assign a condition rule to the template.
   a) Click the Get Feedback on Worker tab.
   b) Click the + icon to create the condition rule.
   c) In the Feedback Template field, select the Feedback for Australian Workers template.
   d) In the Condition Rule field, select *Create Feedback on Worker Template Condition Rule*.
   e) Click OK.
4. Set up the condition rule.
   a. In the Create Feedback on Worker Template Condition Rule task, enter *Feedback for Australia Workers* in the Description field.
   b. In the Copy Condition from Rule field, select the *Workers located in Australia* option.

      Workday populates these values in the first row of the Rule Conditions grid:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	Location Address - Country	in the selection list	Value specified in this filter	Australia

   c. Click OK.

Result

When a worker submits a Get Feedback on Worker request for a worker in Australia, that feedback giver can only select the Feedback for Australian Workers template.

Related Information

Tasks

Create Business Process Condition Rules

Set Up Anytime Feedback Notifications

Prerequisites

Enable email notifications and mobile push notifications. See Reference: Edit Tenant Setup - Notifications.

Security: *Set Up: Tenant Setup - BP and Notifications* domain.

Context

When you enable anytime feedback notifications, workers can send notifications to other parties that they provided the feedback. Workers can send feedback notifications only when the feedback isn't anonymous or private. Workday displays the Workers to Notify prompt on the Give Feedback task:

- When workers select the *Show my name?* and *Share with others* options to give feedback to a single recipient.
- When workers give feedback to multiple recipients.

Workers must be in the *Worker Data: Anytime Feedback* domain to be selected in the Workers to Notify prompt. When a worker provides feedback to multiple recipients and sends feedback notifications, the notified workers receive separate notifications for each feedback recipient.

Steps

1. Add workers to the *Worker Data: Anytime Feedback* domain so they can be selected in the Workers to Notify prompt on the Give Feedback task.
2. Access the Edit Tenant Setup - Notifications task.
3. Select *HCM* in the Notification Delivery Settings section, and then select the Override Parent Notification Type Settings check box for the Give Feedback notification type.
4. Select the *Notification Routing Rule for Give Feedback Notification Category* routing rule to enable the Workers to Notify prompt on the Give Feedback task.
5. From the related actions menu of the *Notification Routing Rule for Give Feedback Notification Category* routing rule, select Notification Routing Rule > Edit.
    - Enable mobile push notifications by selecting *Mobile Push Notifications* from the Channel prompt and *Immediately* on the Default Frequency prompt.
    - Enable email notifications by selecting *Email* from the Channel prompt and *Immediately* on the Default Frequency prompt.
6. To mute feedback notifications and prevent Workday from displaying the Workers to Notify prompt, clear the Override Parent Notification Type Settings check box for the Give Feedback notification type, and set the parent Default Frequency to Mute.

Result

Workers can notify other parties when giving anytime feedback to another worker.

Related Information
Tasks
Set Up Mail Servers for Email Notifications
Set Up Mobile Push Notifications

Steps: Set Up Mass Operation Feedback Events

Prerequisites

Security: These domains in the System functional area:

- *Business Process Administration*
- *Custom Report Creation*

Context

You can encourage continuous feedback by scheduling mass feedback events for multiple workers at once. You can configure these mass feedback events:

- *Launch Get Feedback on Self*: Mass launches the *Get Feedback on Self* business process to enable groups of workers to request feedback on themselves.
- *Launch Get Feedback on Worker*: Mass launches the *Get Feedback on Worker* business process to enable managers to request feedback on workers from a target audience. Collecting feedback on managers from their direct reports, or on employees from their mentors and connections can be useful.
- *Cancel Feedback Requests*: Mass cancels incomplete or expired *Give Requested Feedback* events to remove them from My Tasks for feedback providers.

Steps

1. Edit Business Process Security Policies.

   or *Launch Get Feedback on Self* or *Launch Get Feedback on Worker* events only, update the *Get Feedback on Self* or *Get Feedback on Worker* business process security policy for mass launch and add:

   - The *Employee as Self* security group to the *Get Feedback on Self - Mass Launch* action step on the *Get Feedback on Self* business process security policy.
   - A role-based security group, like Manager or HR Partner, to the *Get Feedback on Worker - Mass Launch* action step on the *Get Feedback on Worker* business process definition.
2. Create a Segment-Based Security Group for Mass Operations.

   Select:

   - The *Talent Administrator* security group, or another unconstrained security group, from the Security Groups prompt.
   - The *Launch Get Feedback on Self* or *Launch Get Feedback on Worker* from the Access to Segments prompt.
3. Grant *View and Modify* permission to your segment-based security group on the *Mass Operation Management* domain in the System functional area.
4. Create Custom Reports.

   Set up a custom report to use as the input report in the Mass Operations Management task. As you complete the report for your mass operations, consider:

Operation	Considerations
Launch Get Feedback on Self	Create a report for the feedback requestors. The report must use the Indexed All Workers report data source (RDS) and return fewer than 50,000 workers.
Launch Get Feedback on Worker	Create a report for the feedback recipients or the people you're requesting feedback about. When creating the custom report, select the *Currently Active* filter from the Field prompt to ensure that Workday only requests feedback for active workers. The report must also use the Indexed All Workers RDS and return fewer than 50,000 workers.
Cancel Feedback Requests	Create a report for *Give Requested Feedback* events to cancel. To cancel only expired feedback requests, you can copy the Expired Feedback Requests report to a custom report. Configure the: • Give Requested Feedback Events RDS.

Operation	Considerations
	• *All Give Feedback Requested Events Secured for Processing Person* data source filter. • Expiration Date report field. • Get Feedback Event report field.

5. Set Up Mass Operations.

   As you complete the task, consider:

Option	Description
Mass Operation Type	Select the mass operation: • *Launch Get Feedback on Self* • *Launch Get Feedback on Worker* • *Cancel Feedback Requests*
Input Report	Select your custom report.
Run Frequency	If your run frequency isn't *Run Now*, you can configure run frequency details on the Schedule tab. To encourage continuous feedback, select a recurring frequency.
Feedback Template	(Optional) Workday populates this field if you defined a default feedback template in the Maintain Feedback Setup task for the *Get Feedback on Self* or *Get Feedback on Worker* business process. If you have condition-rule based feedback templates defined on the Maintain Feedback Setup task and also have a feedback template specified on the Mass Operation Management task, when the worker receiving the feedback request matches any condition rule, the condition-rule based template will populate the feedback request. If you assign multiple feedback templates to a condition rule, Workday displays the first template on the condition rule list in the feedback request, but workers can select a different template. For workers that don't meet any condition rules, the template specified on the Mass Operation Management task will populate the feedback request.
Feedback Requestors	(Get Feedback on Worker only) Select the users who will receive the Get Feedback tasks in My Tasks. Workday displays available role-based security groups based on the security policy for the *Get Feedback on Worker - Mass Launch* action step in the default business process definition.
Feedback Providers	(Get Feedback on Worker only) Enter feedback providers for Workday to populate the From Workers prompt in the *Get Feedback* task in My

Option	Description
	Tasks. The available feedback providers are based on the feedback recipients' relationships defined in Workday (mentors, mentees, connections, or direct reports). If you don't specify this field, then Workday leaves the From Workers prompt blank.

Result

- Mass Launch Get Feedback on Self: Workers receive task My Tasks that they can use to request feedback from another worker. The task includes the feedback template if you selected one when you ran the mass operation.
- Mass Launch Get Feedback on Worker: Feedback requestors, like managers, can open the *Get Feedback on Worker* event from their My Task. Once the feedback requestor submits the request, the feedback provider then receives a task in My Tasks and completes the feedback request.
- Mass Cancel Feedback Requests: Workday removes outdated or ignored feedback requests from the My Tasks of feedback providers. When there's only 1 Give Requested Feedback subprocess, Workday also cancels the parent business process event.

Workday notifies you if you include an inactive feedback template in a mass launch. The mass launch operation still launches successfully, but feedback requestors must manually select an active template or create their own questions. This limitation only applies for daily, weekly, or monthly run frequencies.

Note: If an administrator enables the *Talent Effect* option in the leave type for an employee on a Leave of Absence, Workday doesn't include the employee in team reports for mass operation feedback events.

Concept: Give Feedback to Multiple Recipients

Workers can give anytime feedback to more than 1 person in the same operation by selecting multiple recipients in the Give Feedback task. When a worker selects multiple recipients for feedback, Workday launches the *Give Feedback to Multiple Recipients* business process, which initiates a separate *Give Feedback* event for each recipient.

Note: Workers can give feedback to multiple recipients only when accessing the Give Feedback task through global search or from the Anytime Feedback worklet on the Talent and Performance dashboard.

Feedback for multiple recipients can't be confidential, private, or anonymous. The Maintain Feedback Setup task settings for these feedback types don't apply once a worker's action launches the *Give Feedback to Multiple Recipients* business process. If a worker edits, corrects, or cancels the feedback for 1 of the recipients, the change applies to all recipients.

You can edit the *Give Feedback to Multiple Recipients* business process to add an approval step. The approval step must be configured before the completion step. To enable feedback recipients or other users to approve the feedback, add an approval step on the *Give Feedback* business process definition.

When you're purging feedback for active workers sent to multiple recipients, you can purge feedback for 1 of the recipients but keep it for the others. Example: if Michelle gives feedback to John, Sally, and Miguel, you can purge the feedback for John but keep that same feedback for Sally and Miguel.

Related Information
Examples
Example: Condition Rule to Prevent Feedback to Multiple Recipients on page 1763

Reference: Feedback Security Domains

Workday delivers these security domains in the Performance Enablement functional area so you can control what types of feedback workers can give, receive, and view.

Security Domain	Description
Self-Service: Feedback.	Provides workers self-service access to their feedback. This domain is the parent domain for all Self-Service feedback domains.
Self-Service: Anytime Feedback.	Provides workers self-service access to view nonprivate, and nonconfidential feedback given by others.
Self-Service: Edit Feedback.	Provides workers self-service access to edit anytime feedback given to others through the Give Feedback task within a 1-hour timeframe.
Self-Service: Role Requested Feedback.	Provides workers self-service access to view nonconfidential feedback on themselves that was requested from others using the *Get Feedback on Worker* business process.
Self-Service: Self Requested Feedback.	Provides workers self-service access to view nonprivate feedback that they requested on themselves using the *Get Feedback on Self* business process.
Worker Data: Anytime Feedback.	Provides access to view nonprivate and nonconfidential feedback for another worker given as part of the *Give Feedback* business process.
Worker Data: Confidential Feedback.	Provides access to view confidential feedback about another worker given as part of the *Give Feedback* or *Get Feedback on Worker* business processes.
Worker Data: Private Feedback.	Provides access to view private peer-to-peer feedback about another worker given as part of the *Give Feedback* or *Get Feedback on Self* business processes.
Worker Data: Role Requested Feedback.	Provides access to view nonconfidential feedback about a worker requested through the *Get Feedback on Worker* business process.
Worker Data: Self Requested Feedback.	Provides access to view nonprivate feedback about a worker that was requested about themselves through the *Get Feedback on Self* business process.

Reference: Feedback Business Processes

Workday delivers these business processes in the Performance Enablement functional area so you can enable workers to receive and provide feedback:

Business Process	Description
Give Feedback.	Enables workers to provide unsolicited, anytime feedback.
Give Feedback to Multiple Recipients.	Enables a worker to provide nonanonymous, nonconfidential, and nonprivate feedback to multiple recipients. Workday automatically

Business Process	Description
	enables this business process and you can't opt out of it.
Get Feedback on Self.	Enables workers to request feedback about themselves from another worker.
Get Feedback on Worker.	Enables workers (usually managers) to request feedback on another worker (usually direct reports).
Give Requested Feedback.	Enables workers to provide feedback in response to a request from another worker. *Give Requested Feedback* is a subprocess of *Get Feedback on Worker* and *Get Feedback on Self* and doesn't run as a standalone process. If you enable employees to decline feedback requests, you can require a reason. Use the Decline Reason Missing report field in a condition rule on the business process.

Reference: Feedback Reports

You can view feedback using these reports:

Report	Feedback Type	Searchable	Related Action from a Worker	Where It's Available
Feedback for Skills	Feedback on Self Feedback on Worker	No	None	Available for the Feedback group in worker profiles. See Steps: Set Up Skill Endorsements and Ratings on page 1860.
Feedback On My Team	Anytime Feedback on Worker Feedback on Self	No	None	Available as Feedback for the Performance and Talent worklets. Available for the Feedback for Worker Profile profile group in worker profiles.
Feedback Received	Anytime Feedback on Worker Feedback on Self	No	Talent > View Feedback	Available for the Feedback and Performance groups in worker profiles.
Feedback Requested	Feedback on Worker Feedback on Self	Yes	Talent > View Feedback by Request	Available for the Feedback and Performance

Report	Feedback Type	Searchable	Related Action from a Worker	Where It's Available
				groups in worker profiles.
Requested Feedback Responses	Feedback on Worker Feedback on Self	Yes	None	Use this standard report to create a custom report and add it to the Worker Profile.
View Feedback Given to Others	Anytime Feedback on Worker Feedback on Self	No	Talent > View Feedback Given to Others	Available as Feedback Given for the Performance group in worker profiles.
View Feedback Received	Anytime Feedback on Worker Feedback on Self	Yes	Talent > View Feedback Received	Available as View Feedback Received in the Performance and Feedback for Worker Profile profile groups in worker profiles.

Related Information

Tasks

Steps: Set Up Feedback on page 1737

Reference

Workday Community: Creating a Custom Report from the Requested Feedback Responses Standard Report to Display on the Worker Profile

Example: Condition Rule to Prevent Feedback to Multiple Recipients

Workday automatically enables the *Give Feedback for Multiple Recipients* business process when a user accesses the Give Feedback task and selects multiple recipients. You can't opt out of the *Give Feedback to Multiple Recipients* business process. This example illustrates how to create a condition rule to prevent or discourage users from giving feedback to multiple recipients. You must have administrative privileges to create this condition rule.

Context

You want to prevent users from selecting multiple recipients when giving feedback. When users select more than 1 recipient, you can set up a condition rule to issue a validation message and prevent them from submitting the task. Alternatively, you allow users to select multiple feedback recipients, but you want to warn them that this feedback is publicly visible. You can set up a condition rule to create a validation message to provide that warning.

Steps

1. Access the *Give Feedback to Multiple Recipients* business process definition.
2. In the Business Process Steps tab, click the magnifying glass for the *Initiation* step and select the Business Process > Create Condition Rule related action.

3. Enter a description for the condition rule and set the Rule Conditions to And with a value of 1=0. Click OK.
4. Navigate back to the business process definition and click the magnifying glass for the *Initiation* step and select the Business Process > Maintain Step Conditions related action. Click OK.
5. In the Validation Conditions grid, add a condition rule row and select *Create Condition Rule* in the Rule field.
   - To prevent users from giving feedback to multiple recipients, select the *Critical* option in the Severity field.
   - To enable users to give feedback to multiple recipients but display a validation message only, select the *Warning* setting in the Severity field.

   Click OK.
6. On the *Create Condition Rule* step:
   a) Enter the condition rule description. Example: Feedback to Multiple workers isn't allowed.
   b) In the Source External Field or Condition Rule field, enter 1=0 (the value created in step 3).
   c) In the Relational Operator field, select *equal to*.
   d) In the Comparison Type field, select *Value specified in this filter*.
   e) In the Comparison Value field, select *No*.
7. (Optional) Create the validation message that's displayed when users initiate the Give Feedback task and select multiple recipients.
   a) Navigate back to the business process definition and click the magnifying glass for the *Initiation* step and select the Business Process > Maintain Step Conditions related action.
   b) Select Validation > Configure Validation Message.
   c) Select the *Text* option in the *Text/External Field and enter the validation text you want to display.

Result

When users access the Give Feedback task and select multiple recipients, they receive a validation message and are prevented from submitting the task. They click Cancel to return to the task and then select a single feedback recipient. If you created the condition rule to issue only a validation message, the message displays in a pop-up window. Users can give feedback to multiple recipients after viewing the message.

Note: The step and validation message preventing the feedback to multiple recipients will happen after the user submits the feedback request. The user must return to the Give Feedback task and re-enter the feedback content.

Check-Ins

Setup Considerations: Check-Ins

You can use this topic to help make decisions when planning your configuration and use of check-ins. 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

Check-ins enable workers to hold 1-on-1 continuous conversations with managers, peers, and mentors. Managers can use check-ins and check-in topics for informal coaching and career conversations with their workers.

Business Benefits

In Workday, check-ins:

- Are easy to set up and use because they don't require business process configuration.
- Provide a supplement to more formal employee review and feedback events with less administrative overhead.
- Enable you to encourage more frequent and personal communication in your organization.
- Provide comprehensive supporting details for more thorough performance reviews.

Use Cases

Users can:

- Create and schedule check-ins, and create individual check-in topics to share information and track discussions.
- Associate check-in topics with multiple check-ins with a participant.
- Create and edit check-ins and check-in topics on Workday and Workday on Android, iPad, and iPhone.
- Attach documents to check-ins and check-in topics to supplement discussions.

Questions to Consider

Questions	Considerations
How do you enable workers to participate in check-ins?	Workers secured to the *Self-Service: Check-Ins* domain can create and view check-ins.
How can you integrate check-ins into performance reviews?	You can create a custom report for check-ins and check-in topics and embed it as a check-ins analytic worklet in performance review business processes.

Recommendations

- Create analytics to sort by check-in topic instead of by check-in date to analyze data by subject.
- To more effectively track conversations, inform users to manually add name or date and time stamps in Shared Notes on specific comments.

Requirements

Set up domains to enable workers to participate in check-ins.

Limitations

Workday doesn't support:

- Sharing a topic with multiple participants.
- Deleting a check-in by anyone other than the person who created it.
- Recovering deleted content in a check-in or check-in topic.
- Disabling Shared Notes.
- Disabling the ability of workers to overwrite the other participant's content in Shared Notes.

- Disabling My Notes for participants' private notes.
- Mass archiving of check-ins or check-in topics.
- Tracking user edits or deletions for check-ins or check-in topics. Workday doesn't support audit trails or a history of changes for check-ins and check-in topics. Example: the creator of a check-in topic can delete it with no record of the deletion.

  Administrators secured to the *Auditor* security group can perform audits of individual check-ins or check-in topics.

Tenant Setup

You can set up routing rules for check-ins notifications on the Edit Tenant Setup - Notifications task.

Security

These domains in the Performance Enablement functional area:

Domains	Considerations
Self-Service: Check-Ins	Add workers to this domain so they can create and view their own check-ins and check-in topics.
Worker Data: Check-Ins	Add managers to this domain so they can manage check-ins of other users in their organization.
Set Up: Check-Ins	Add administrators to this domain so they can set up help text for check-ins.

Business Processes

No impact.

Reporting

Reports	Considerations
My Check-Ins	Enables self-service access for workers to view their check-ins and check-in topics.
View Check-Ins	Enables managers to view check-ins and check-in topics for selected participants. My Notes entered by participants are private and not included in the report.
Check-Ins	Enables managers to view a report of all check-ins for an organization.
Check-In Topics	Provides a report of all check-in topics for an organization. Administrators can use the report to track check-in topics for each worker.

You can use the Check-In report data source to create custom reports.

Integrations

Workday provides these web services for check-ins:

- *Get Check-Ins*
- *Put Check-Ins*
- *Get Check-In Topics*

- *Put Check-In Topics*

Connections and Touchpoints

Check-Ins interact with Manager Insights Hub, where managers can view and manager check-ins for their direct reports. 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: Manager Insights Hub on page 2933

Steps: Set Up Check-Ins

Context

Check-ins provide an informal method of 1-on-1 communication between workers to supplement formal employee review and feedback events. You can use check-ins for communication between managers and workers that's less structured than formal employee review or feedback processes. You don't need to configure any business processes to set up check-ins.

A check-in includes 2 participants: the user who creates the check-in and the user who receives the check-in. Workers can create only 1 check-in for a given date for each participant. Check-in dates can be in the past or in the future, and participants can change the date at any time. Workers can create multiple check-in topics for each check-in. Check-in topics can contain both notes shared with other workers and notes workers keep for themselves (My Notes). Workers can add and remove attachments to check-ins and to check-in topics.

You can set up check-ins so that workers secured to the *Self-Service: Check-Ins* domain can send and receive check-ins to other workers secured to that domain, not just their managers.

Workers can create and edit check-in topics on the Workday mobile app.

Steps

1. Edit Domain Security Policies.

   Set up check-ins for these domains in the Performance Enablement functional area:

   - *Self-Service: Check-Ins*
   - *Worker Data: Check-Ins*
2. (Optional) Set up push notifications and notification settings for check-ins and check-in topics.
   a) Access the Edit Tenant Setup - Notifications task.
   b) Set Up Mobile Push Notifications.
   c) Select HCM in the Notification Delivery Settings section to override the parent notification type delivery settings. Create a notification routing rule for check-ins to enable or disable the Notify Participants check box.

      See Create Notification Routing Rules.
3. (Optional) Configure these profile groups to display check-ins on the Performance tab or the Career tab of the Worker profile:

   - Career for Worker Profile
   - Performance for Worker Profile

   See Steps: Set Up Profiles and Profile Groups.

4. (Optional) Add the View Check-Ins report to the Team Performance Dashboard and the My Check-Ins report to the Talent and Performance Dashboard.

   See Steps: Set Up Dashboards and Landing Pages.

5. (Optional) Access the Maintain Check-Ins Setup task to add help text that displays on the My Check-Ins report.

   Security: *Set Up: Check-Ins* in the Performance Enablement functional area.

Result

Workers can create, view, edit, delete, and archive check-ins and check-in topics.

You can customize the Check-Ins and Topics labels on the Maintain Custom Labels task.

Related Information
Reference
Reference: Edit Tenant Setup - Notifications

Succession

Setup Considerations: Succession

You can use this topic to help make decisions when planning your configuration and use of succession. 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

Succession is the process of identifying candidates who are ready to move into a position. You can track the preparedness of internal and external candidates to take up a position using:

- Succession plans.
- Succession pools.

Business Benefits

Tracking succession candidates helps:

- Reduce the days to fill vacancies for important roles.
- Ensure that these roles are continuously occupied.

Developing internal candidates for succession contributes to employee engagement and advancement.

Use Cases

You can use succession plans to fill:

- High-level leadership positions in the organization.
- Positions requiring advanced knowledge of proprietary technology.
- Positions requiring specialized skills, crucial for business success.

Succession pools track candidates that qualify for particular job profiles and are suitable for filling lower-level jobs such as first- or second-level managers.

Questions to Consider

Questions	Considerations
What's the difference between talent pools and succession pools?	Succession pools enable you to assess the readiness of internal candidates and consider external candidates for job profiles. You can use talent pools more generally. Example: to organize workers for development, tracking, and planning purposes. You can configure talent pools to manually or automatically populate workers based on certain qualifications, whereas you must manually populate succession pools. You can populate succession plans from talent pools but not succession pools.
Who can you add to succession pools and plans?	You can add internal and external candidates who have potential to develop into the positions you're tracking. You can create confidential prospects to add to succession pools and plans.
Which roles should you prioritize for succession?	To ensure a smooth succession, prioritize roles that are key for business success such as the executive and leadership levels. The further you go down the organization for succession planning, you must track candidates for a greater quantity of positions.
Who is responsible for managing succession?	You can assign roles to help manage succession, including: • Succession partners who perform succession management tasks for assigned organizations and approve business process events. • Succession pool managers who perform succession management tasks for assigned succession pools. This role doesn't have approval authority, which is assigned to the creator of the succession pool. • Talent administrators who create and maintain all talent setup data. This role has approval authority for talent management business processes.
How do succession plans and pools differ for different staffing models?	You can consider these differences when determining whether to use succession plans, pools, or both in your organization. When a worker leaves a position in a job management organization, the succession plan no longer persists with that position, and you must populate another plan for that position. In a position management organization, the succession plan persists until the position closes, regardless of whether or not a worker occupies the position. However, when a succession plan separates from the position in either staffing

Questions	Considerations
	model, you can restore the succession plan using the Move Succession Plan task. Succession pools apply only to job profiles, which associate well with the job management staffing model. However, both staffing models support succession pools.
What helps inform succession?	You can use these measures of employee performance and development to inform succession planning in your organization: • Assess potential. • Calibration. • Performance review. • Talent review.

Recommendations

Assess potential as part of succession to provide additional insight into existing candidates and identify new candidates for succession.

Enable nomination tracking so that managers can nominate employees to job profiles as part of potential assessment. Talent administrators can view nominees by filtering workers using the Nominations facet filter on the Find Workers report, and decide to add them to succession pools or plans.

To ensure an organization-wide approach to succession, create succession strategies and assign them to candidates.

Enable the critical job check box on job profiles and position restrictions. Critical roles inform succession-related reports, such as:

- Critical Open Positions
- Find Workers
- Succession Plans for Critical Positions

Base succession planning on supervisory organizations and not on intersection, location, and other related security groups and roles.

Requirements

Define readiness values to make them available to select on succession plans. You can't add candidates on succession plans unless you select a readiness value.

Limitations

Succession plans and pools don’t auto-populate or suggest candidates based on skills related to the position. However, you can configure dynamic talent pools to populate succession plans.

Tenant Setup

No impact.

Security

Talent pool domains enable the same functionality as succession pools.

Domains	Considerations
Indexed Data Source: Positions in the Jobs & Positions functional area.	Grants access to the Find Positions Without Succession Plans report.
Mass Operation Management in the System functional area.	Enables you to conduct potential assessments for a large number of supervisory organizations by mass launching the Assess My Team's Potential.
Set Up: Recruiting in the Recruiting functional area.	Enables you to define prospect categories for succession pools, such as Succession Candidate. Categories enable you to filter and search for external succession candidates.
Set Up: Succession in the Talent Pipeline functional area.	Enables you to create values that define candidates' readiness to move into a position. You can also enable nomination tracking, identify external candidates, and create succession strategies.
Set Up: Talent in the Talent Pipeline functional area.	Enables you to create values that define candidate attributes, such as: • Potential • Retention • Loss impact • Achievable levels
Talent Pool: Create in the Talent Pipeline functional area.	Enables you to create succession pools.
Worker Data: Succession in the Talent Pipeline functional area.	Enables administrators and partners to manage and view succession plans for the positions they support.
Worker Data: Succession Plan-Any in the Talent Pipeline functional area.	Enables managers to view the succession plans workers are in, but not the details within the plans.

Business Processes

Business Processes	Considerations
Manage Succession Plan	Enables you to track succession plan candidates.
Remove Worker From Talent	Enables you to automatically remove workers from succession plans and succession pools upon termination.
Start Development Plan	You can include potential assessment as a subprocess of *Start Development Plan*. You can use the results of the potential assessment to inform succession.
Start Performance Review	You can include potential assessment as a subprocess of *Start Performance Review*. You can use the results of both performance review and potential assessment to inform succession.

Reporting

Report	Considerations
Find Workers	You can directly compare up to 5 workers to assess candidates for succession.
Succession Planning Summary	You can view details of all succession plans for the organization.
Succession Profile	You can view and edit the worker succession plans and add workers to other succession plans.

You can add these reports to your Talent dashboard to view analytics for succession:

- Average # of Successors for Position
- Retirement Eligibility by Critical Job
- Top Talent on Succession Plans
- Succession Plans at Risk

Integrations

No impact.

Connections and Touch points

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: Manage Succession Plans on page 1777
Steps: Manage Succession Pools on page 1778
Steps: Set Up Assess Potential on page 1773

Reference

Reference: Succession Planning Reports on page 1781

Steps: Set Up Succession

Context

Succession helps identify candidates for critical positions in your organization. You can track a candidate's level of readiness to move into a position and other attributes in succession plans and pools.

Steps

1. Access the Maintain Readiness task.

   Create the codes that define candidates' readiness to move into a position identified for succession planning.

   Security: *Set Up: Succession* domain in the Talent Pipeline functional area.
2. (Optional) Hide or Require Optional Fields.

   Select the fields you want to remove from the tasks and reports in the Talent Pipeline functional area.
3. (Optional) Access the Maintain Succession Plan Setup task.

   Configure your succession plans to include nomination tracking, external candidates, and skills.

   Security: *Set Up: Succession* domain in the Talent Pipeline functional area.

4. (Optional) Edit Business Processes.

   Configure the *Remove Worker From Talent* business process to automatically remove terminated workers from succession pools and plans.
5. (Optional) Edit Business Process Security Policies.

   Configure the *Remove Worker From Talent* business process security policy.
6. (Optional) Activate Pending Security Policy Changes.

Related Information

Reference

2025R2 Feature Release Note: Skills in Succession Plans

Steps: Set Up Assess Potential

Context

Assessment values enable you to identify good candidates for succession. These values can include:

- Achievable promotion level relative to current position.
- Perceived risk of leaving the company.
- Potential.
- Potential impact of loss.
- Custom values.

You can assess employee potential independently or as part of:

- Calibration.
- Employee reviews.
- Talent Reviews.

To assess potential during calibration, create a calibration program that enables you to update potential assessment during calibration.

To assess potential during employee reviews, include the *Assess Potential* subprocess in these business processes:

- *Start Performance Review*.
- *Start Development Plan*.

To access the Assess Potential task on mobile, configure the task as a:

- Step on the *Start Performance Review* business process.
- Section on the talent review template.

Steps

1. Access the Maintain Potential task.

   Create the codes that define the potential to move into a position identified for succession planning.

   Security: *Set Up: Talent* domain in the Talent Pipeline functional area.
2. Access the Maintain Readiness task.

   Create the codes that define candidates' readiness to move into a position identified for succession planning.

   Security: *Set Up: Succession* domain in the Talent Pipeline functional area.
3. Access the Maintain Retention task.

   Create codes that define employees' risk of leaving the company.

   Security: *Set Up: Talent* domain in the Talent Pipeline functional area.

4. Access the Maintain Loss Impact task.

   Create the codes that define the impact of losing an employee.

   Security: *Set Up: Talent* domain in the Talent Pipeline functional area.
5. Access the Maintain Achievable Levels task.

   Create the codes that define levels to advance to the position identified for succession.

   Security: *Set Up: Talent* domain in the Talent Pipeline functional area.
6. (Optional) Access the Maintain Talent Matrix Setup task.

   Enable the configurable Potential Assessment Value fields that you want to use, and enter labels for them.
7. (Optional) Access the Maintain Succession Plan Setup task.

   Enable nomination tracking to nominate employees to job profiles during potential assessment.
8. Edit Business Processes.

   Configure these business processes:

   - *Assess Potential*
   - (Optional) *Assess My Team's Potential*
   - (Optional) *Start Potential Assessment*

   The *Start Potential Assessment* business process enables you to start the performance review with a potential assessment.
9. Edit Business Process Security Policies.

   Configure these business process security policies in the Career and Development Planning, Performance Enablement, and Talent Pipeline functional areas:

   - *Assess Potential*
   - (Optional) *Assess My Team's Potential*
   - (Optional) *Start Potential Assessment*
10. Activate Pending Security Policy Changes.

Next Steps

Access the Employee Potential report to review employee attributes.

Assess your team's potential. The Organizations prompt only displays the organizations you manage.

Steps: Set Up Mass Operations for Assess Potential

Prerequisites

Security: *Mass Operation Management* domain in the System functional area.

Context

You can use the Mass Operations Management framework to create, launch, and cancel assess potential events in mass, enabling you to conduct assessments for a large number of supervisory organizations.

You can launch Assess My Team's Potential events, independent of performance reviews, in mass to the specific supervisory organizations listed in a custom report.

Steps

1. Create a Segment-Based Security Group for Mass Operations.

   As you complete the task, consider:

Option	Description
Type of Tenanted Security Group	Select *Segment-Based Security Group*.
Name	Workday recommends naming the security group *Mass Assess My Team's Potential*.
Security Groups	Select these groups: • *Business Process Administrator* • *HR Administrator* • *Talent Administrator*
Access to Segments	Select *Assess My Team's Potential*.

2. Edit Business Process Security Policies.

   In the Who Can Do Action Steps in the Business Process section of the *Assess My Team's Potential* business process, add *Manager* to the Security Group of the Assess My Team's Potential - Mass Launch action step.
3. Activate Pending Security Policy Changes.
4. From the related actions menu of the *Assess My Team's Potential* business process, select Business Process > Edit Definition.

   Add a row in the Business Process Steps section.

   As you complete the business process steps, consider:

Option	Description
Order	Specify the completion order of this step. Example: ab.
Type	Select *Action* as the step type for the business process.
Specify	Select *Assess My Team's Potential - Mass Launch* as the allowed action for the business process.
Group	Select *Manager*.

5. Create Custom Reports.

   As you complete the task, consider:

Option	Description
Report Type	Select *Simple* as the report type.
Data Source	Select *Supervisory Organizations* as the data source.
Optimized for Performance	Clear this check box to include *Supervisory Organizations* as the data source.
Columns	Select *Supervisory Organization* as the report field.
(Optional) Filter	Select *Supervisory Organization* as the report field.

Option	Description
(Optional) And/Or	Select *And*.
(Optional) Operator	Consider the operator option you want for your custom report. To exclude specific supervisory organizations from receiving mass assess potential events, select *not in the selection list* as the operator option and enter the supervisory organizations you want to exclude under Comparison Value.

Mass Assess My Team's Potential supports only supervisory organizations.

6. Access the Mass Operation Management task.

   As you complete this task, consider:

Option	Description
Mass Operation Type	Select *Mass Assess My Team's Potential* as the mass operation type.
Input Report	Select the custom report you created.
Run Frequency	Select *Run Now*.

7. (Optional) Select Business Process > Cancel from the related actions menu of an in-progress *Assess My Team's Potential* business process.

   Select any associated assess potential events that you want to cancel.

   Security: *Business Process Administration* domain in the System functional area.

Result
Workday launches Assess My Team's Potential events for the supervisory organizations listed in your custom report. You can view the completion status of this event in your notifications. Managers receive Assess My Team's Potential events in My Tasks.

Next Steps

You can review the Data Not Processed report to identify unprocessed supervisory organizations.

Related Information
Reference
Reference: Filter Operators
Reference: Filter Operators

Steps: Set Up Succession Pool Security

Context

Succession pools help track candidates for one or more job profiles. Workday delivers a Succession Pool Manager role to manage succession pools. You can also create custom roles and configure the security for succession pool management.

Steps

1. Set Up Assignable Roles.

   Select *Succession Pool* on the Enabled for prompt.

2. Create Role-Based Security Groups.

   Create a constrained role-based security group for the role you created.
3. Edit Domain Security Policies.

   Add the new security group to the security policies of these domains:

   - *Talent Pool: Create*
   - *Talent Pool: Manage Membership*
   - *Talent Pool: View and Edit*

   (Optional) To enable managers to view succession plans outside their organizations, grant the *Manager* security group view access to the *Worker Data: Succession Plan - Any* security domain.
4. Access the Configure Profile task.

   Enable the groups for the Succession Pool profile.

   Add the Overview for Succession Pool group to the Succession Pool profile.

   Security: *Set Up: System* domain in the System functional area.
5. Access the Configure Profile Group task.

   Enable reports for the Overview for Succession Pool profile group.

   Add the Succession Pool Candidates report to the Overview for Succession Pool profile group.

Result

You can now:

- Assign workers to succession management roles.
- Create succession pools for individual job profiles.

Next Steps

View succession related reports in succession pool profiles.

Related Information

Reference

The Next Level: Building and Retaining a Healthy Pipeline

Steps: Manage Succession Plans

Prerequisites

Configure the *Manage Succession Plan* business process and security policy in the Talent Pipeline functional area.

Context

Succession plans help track candidates for critical positions.

A succession plan provides information about:

- Employees who are candidates to fill a position.
- Employee readiness to step into the position.
- The candidate identified as the top successor to fill the position.

Steps

1. Access the Find Positions Without Succession Plan report.

   Identify positions that don't have any succession plans.

   Security: *Indexed Data Source: Positions* domain in the Jobs & Positions functional area.

2. Access the Create Succession Plan task.
   Create Succession plans for positions that need them.
   Security: *Search: Find Succession Plans* and *Set Up: Succession* in the Talent Pipeline functional area.
3. Access one of these tasks:
   - Manage Succession Plan
   - Copy From Another Plan

   Update the succession plan by manually adding candidates or copying candidates from 1 succession plan to another.
4. (Optional) Access the Move Succession Plan task.
   Move candidates from 1 succession plan to another.
5. (Optional) Add external or confidential candidates to the succession plan.
   See: Steps: Manage Succession Candidates on page 1779.

Result

You can now track candidates in succession plans.

Related Information
Reference
Reference: Succession Planning Reports on page 1781
FAQ: Succession Plans on page 1783

Steps: Manage Succession Pools

Prerequisites

Create roles and configure the security for succession pool management.

Context

Succession pools help track candidates for critical job profiles.

A succession pool provides information about:

- Employees who are candidates for a job profile.
- Employee readiness to step into the job.
- The candidate identified as the top successor to fill the job.

Steps

1. Access the Create Succession Pool task.
   Create succession pools for job profiles.
   You're automatically assigned the Succession Pool Manager role for the created succession pool.
   Security: these domains in the Talent Pipeline functional area:
   - *Talent Pool: Create*
   - *Worker Data: Succession Plan - Any*
2. Access the Find Workers Report.
   Select workers and add them to succession pools.
   Security: *Search: Find Worker* in the Worker Profile and Skills functional area.
3. (Optional) Add external or confidential candidates to the succession pool.
   See: Steps: Manage Succession Candidates on page 1779.

Result

You can now track candidates in succession pools.

Related Information

Tasks

Steps: Set Up Succession Pool Security on page 1776

Steps: Manage Succession Candidates

Prerequisites

Create 1 or more succession pools or plans.

Context

In addition to internal workers, you can add these types of candidates to succession pools and plans:

- Internal confidential.
- External confidential.
- External.

Steps

1. (Optional) Access the Maintain Prospect Types task.

   Define a category of prospects for succession pools and plans.

   Security: *Set Up: Recruiting* domain in the Recruiting functional area.
2. (Optional) Access the Maintain Succession Plan Setup task.

   Enable external candidates for succession pools and plans.
3. Access 1 of these tasks:

   - Create Confidential Prospect to create internal or external confidential candidates.
   - Create Prospect to create external candidates.

   Select *Succession Candidate* on the Type prompt to make candidates available for succession pools and plans.

   Security: *Create Confidential Prospects* in the Recruiting functional area.

   Security: *Prospects* in the Recruiting and Talent Pipeline functional areas.
4. (Optional) Access the View Succession Pool report.

   Click the Edit Candidates button and add confidential or external candidates to the succession pool.

   Security: *Talent Pool: View and Edit* in the Talent Pipeline functional area.
5. (Optional) Access the Manage Succession Plan task.

   Add confidential or external candidates to the succession plan.

   Security: *Manage Succession Plan* business process in the Talent Pipeline functional area.

Result

You can now track external and confidential candidates in your succession pools and plans.

Steps: Set Up Succession Planning in HR Partner Hub

Prerequisites

Steps: Set Up HR Partner Hub on page 958

Security: *Worker Data: Succession* domain the Talent Pipeline functional area.

Context

You can configure the Succession Planning report in HR Partner Hub for an overview of succession planning information for the organizations HR Partners support. The Succession Planning report displays your highest level organization or the organizations selected in the filter on the Overview page by default. You can change what organizations are displayed by using the filter at the top of the page.

Note: You must have the same security group access to the *Worker Data: HR Partner Hub* and *Worker Data: Succession* domains to view organizations in Succession Planning in the HR Partner Hub. This feature only supports displaying data for users in constrained role-based, intersection, or aggregation security groups. See: Reference: HR Partner Hub Security and Data Sources.

Steps

1. Access the HR Partner Hub, and use the menu to navigate to Organizational Health > Succession Planning.
2. As you review the cards in the Succession Planning section, consider:

Option	Description
Succession Plans	Displays the total number of succession plans.
Top Organizations	The fill rate of positions with succession plan candidates on the plan at the time of the job change for your organizations. We order this card to display the top 4 organizations. This card displays the data from the Succession Plan Candidate Fill Rate report. Security: *Worker Data: Headcount Reports* and *Worker Data: All Positions* domains in the Staffing functional area.
Plans Without Updates in the Past 6 Months	Displays existing succession plans without updates in the past 6 months.

3. In the Succession Plans, we display a maximum of 3 cards. As you review the cards, you can select:
   - Manage Plan to access the Manage Succession Plan task for the succession plan on the card. See: Steps: Manage Succession Plans.
   - The View All Plans button to navigate to the View All Succession Plans report in a pop-up.
4. The Positions Without Succession Plan section, displays all positions without succession plans in this order:
   - Positions marked as critical.
   - Organization name.
   - Position ID.

   Select the Create Plan button to access the Create Succession Plan task.

Example

Fill Rate Calculation

We calculate the Fill Rate in the View All Succession Plans report with the following formula:

Fill Rate = Total Successful Job Changes / Total Job Changes

Total Successful Job Changes: This is the number of completed, inbound job changes where the incoming worker was a candidate on the organization's succession plan. The job change must have occurred after the succession plan was created and have an effective date on or before the current date. The candidate must have been listed on the most recently completed succession plan event before the job change's effective date.

Total Job Changes: The total number of completed, inbound job changes for all positions within organizations that have position restrictions and a succession plan. This only returns data for job changes after the creation of a succession plan.

You're an HR Partner accessing the Succession Plan Candidate Fill Rate report. Reviewing Organization A to see how the calculation works.

- Organization A has three positions with restrictions: Position A, Position B, and Position C.
- Position A and Position B have succession plans. Position C does not.
- The system only looks at positions that have both Position Restrictions and a succession plan, so we only count data from Position A and Position B.

Position A has 4 job change events. Of these, only 2 meet the criteria for a valid job change. The job changes were completed and inbound, and happened after the plan was created. Out of those 2 valid events, only 1 was considered successful because the incoming worker was a candidate on the succession plan.

Position B has 2 job change events, both of which meet the valid criteria. However, neither was considered successful.

Position C has 20 job change events, but since it has no succession plan, these are not included in the calculation.

The result:

- Total Successful Job Changes = 1 (from Position A)
- Total Job Changes = 4 (2 from Position A + 2 from Position B)

Based on the formula, Organization A's Fill Rate is 1 out of 4, or 25%.

Next Steps

Review the Succession Plan Candidate Fill Rate report.

Related Information
Reference
2025R2 Feature Release Note:Succession Planning in HR Partner Hub

Reference: Succession Planning Reports

Workday delivers reports that help you track and manage succession plans.

Report	Description
Find Positions Without Succession Plan	Finds positions that don't have a current succession plan in place. Use this report to create succession plans for selected positions. Administrators and human resource partners should use this report. Secure human resource partners and administrators to the *Search: Find Succession Plans* domain. Secure talent administrators to the *Indexed Data Source: Positions* domain.
Find Succession Plans	Find plans for organizations, positions, or both. Administrators and human resource partners should use this report. Secure HR Partners to the *Search: Find Succession Plans* domain to enable them to search for, inactivate, and delete succession plans.

Report	Description
	Secure administrators to both the *Set Up: Succession* and *Search: Find Succession Plans* domains.
My Team's Succession Plans	Details include the organization, position, and incumbent.
Navigate Succession Plans	View the position hierarchy for an organization and who currently fills each position. Drill down to see the workers associated with the succession plan for a position. You can access detailed information about: • The succession plans to which the worker belongs. • Current job information. • Skills and experience. • Job history.
Succession Planning Summary	Succession plans by organization. Details include the position, organization, candidates identified as successors for the position, and information about the candidates.
Succession Plans for Critical Positions	Critical positions in a selected organization and their succession plans. You can also use this report to identify critical positions without succession plans.
Succession Pool Membership Tracking	Track changes to succession pool candidates, including: • Candidates added or removed. • The date. • Who made the change.
Succession Profile	A list of succession plans and pools for a specific employee. You can use this report to: • Edit a succession plan. • Add the employee to another succession plan. • Tag the employee into other succession pools.
View Succession Plan for Position	A list of candidates and their readiness for a specific succession plan.
View Succession Pool	Details about current and potential succession candidates. You can: • Add or remove candidates. • Indicate readiness. • Identify top candidates. • Add notes about each candidate.

Related Information

Tasks

Steps: Manage Succession Plans on page 1777

FAQ: Succession Plans

- How do I add a worker to a succession plan?
- How do I delete a succession plan?
- Why can't I see a succession plan?
- Why are terminated workers showing on succession plans?
- What happens to a succession plan during a transfer?
- How do I create or edit external succession candidates?

How do I add a worker to a succession plan?	You can tag workers for membership in succession pools from worker preview cards or the Find Workers report. You can also add workers to succession plans using the: • Manage Succession Plan task. • Succession Profile report. • View Succession Pool report.
How do I delete a succession plan?	You can't delete a succession plan if the plan has prior events associated with it. Inactivate a succession plan to prevent employees and managers from using it. Select the Inactive check box in the: • Find Succession Plans report for positions. • Edit Succession Pool task.
Why can't I see a succession plan?	Access to a succession plan is based on security for the position associated with the succession plan. If you give managers permission on the *Worker Data: Succession Plans - Any* domain, they can view the names of succession plans that their employees are candidates on. Access to succession pools requires that you have a role on the pool.
Why are terminated workers showing on succession plans?	Because succession plans often include external candidates, Workday doesn't automatically remove terminated workers from succession plans. You can configure the *Termination* business process to remove workers from succession plans and pools on their termination date or last day of work. To manually remove a terminated worker, access the Manage Succession Plan task.
What happens to a succession plan during a transfer?	If you're transferring a worker to a new organization without changing their job or position, the succession plan stays with the job or position. If the transfer only moves the worker and not the job or position, then:

	• The job in a job management staffing model closes and the succession plan isn't active. • The position in a position management staffing model remains open and the succession plan is active.
How do I create or edit external succession candidates?	There are 3 ways to set up external succession candidates: • The Create Prospect task. • The Edit Prospect task. • The View Succession Pool report.

Related Information

Concepts

Concept: Termination Impact on page 710

Tasks

Steps: Manage Succession Plans on page 1777

Steps: Set Up Talent Data Removal for Terminated Workers on page 1813

Mentors and Connections

Steps: Set Up Mentorships

Prerequisites

Configure these security policies in the Career and Development Planning and Worker Profile and Skills functional areas:

- *Compare Mentors*
- *Self-Service: Mentoring*
- *Set Up: Mentoring*
- *Self-Service: Skills*
- *Worker Data: Mentoring*

Context

Workday mentorships give structure to informal 1-on-1 relationships between workers. Employees and contingent workers can act as mentors and mentees.

Steps

1. Edit Business Process Security Policies.
    a) Configure the *Manage Mentorship* business process security policy to enable employee self-service for mentorships.
    b) Add the *Employee As Self* security group to the *Add a Mentor*, *Create Mentorship*, *Edit Mentorship with*, and *Close Mentorship with* initiating actions.
2. Configure the *Manage Mentorship* business process in the Career and Development Planning functional area.

    Workday recommends adding the Mentor security group on the *Review Mentorship* or *Approve* step.
3. Activate Pending Security Policy Changes.

4. Access the Maintain Connection Types task.

   As you complete the task, consider:

Option	Description
Enable Mentor Availability Option	Give workers the ability to opt out of being a mentor. Workday refreshes mentor availability every 6 hours in implementation and sandbox tenants, and every hour in production tenants.
Default Mentor Availability	Specify whether the Available for Mentoring field on the My Mentorship Preferences task is set to Yes or No by default. Workers can mark themselves as unavailable for mentorships without changing current mentorships from the My Mentorship Preferences task.
Inactive	Select Inactive to temporarily remove a connection type from use. At least 1 connection type must be active to use mentorships.

   Note: You can create only 1 mentorship event for a worker with the same mentor and mentor type.
5. Access the Maintain Close Mentorship Reasons task.

   Create reasons for ending mentorships.
6. (Optional) Access the Maintain Custom Labels to rename mentor, mentee, and mentorships throughout Talent.
7. (Optional) Edit Business Processes.

   Add the Configure Questionnaire step to the *Manage Mentorship* business process to enable questionnaires for mentors and mentees.
8. (Optional) Configure Questionnaires and Questions.
9. (Optional) Access the Configure Guided Tours task to set up guided tours for *Mentorship Preferences*.
10. (Optional) Access the Configure Profile Group task to add *My Mentorships* to the *Career for Worker Profile* profile group.
11. (Optional) Access the Maintain Dashboards task to add the *Mentorship Events Awaiting Action* worklet to the *Talent and Performance* dashboard or custom dashboards.

Next Steps

- Employees, contingent workers, managers, HR Partners, and administrators can assign a mentorship for a worker using the *Find Mentor* report.
- Employees and contingent workers can request a mentor on the Add a Mentor task.
- Employees and contingent workers can search for and add a mentor, and set their mentorship preferences, using the *My Mentorships* report.
- Employees and contingent workers can view details of their in progress mentorship events using the Mentorships Events Awaiting Action worklet.
- Managers and administrators can assign a mentorship for a worker on the Add a Mentor for Worker task.
- Managers can request feedback on a worker from the worker's mentors or mentees using the Get Feedback on Worker task.
- Administrators can Cancel the *Manage Mentorship* subprocess. For example, administrators can remove mentorship tasks for terminated workers that were assigned as part of the *Hire* business process.

- Administrators, employees, and contingent workers can close a mentorship using the *My Mentorships* report. Select the View/Edit action on the mentor row, then Close Mentorship. Enter the Start and End dates, and the Reason.
- (Optional) To purge mentorship preferences data, access the Purge Person Data task.

Concept: Connections

Connections capture informal networking between workers in your organization. These connections provide insight into the interpersonal relationships within your organization and help increase employee engagement.

Connections are different from mentor-type connections. They're 1 way connections that don't require approval by the worker selected as a connection. For example, Ashlee adds Caleb as a connection. Caleb doesn't have to approve the connection, nor is Caleb aware of the connection, unless Ashlee tells him. However, because Jessica is Caleb and Ashlee's manager, she can view the connection between them and create custom reports on their connection data.

To start tracking connections in Workday, enable these domains in the Career Development and Planning functional area:

Domain	Description
Self-Service: Connections	Provides workers with access to the Add Connections, My Connections tasks, and the Connections worklet on the Talent and Performance dashboard.
Set Up: Connections	Provides administrators with access to the Maintain Connection Types task.
Worker Data: Connections	Provides managers, HR partners, and administrators with view access to workers' connection data.

Talent Highlights

Setup Considerations: Talent Highlights

You can use this topic to help make decisions when planning your configuration and use of Talent Highlights. 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

Talent Highlights are draft lists of strengths and growth opportunities for employees, created by generative AI. Managers can generate this draft content to view quick insights about their direct reports or to help prepare for career conversations.

Managers can edit the content and must confirm their review for human oversight.

Source data for Talent Highlights, which is limited to what the manager can access, displays alongside the content itself for transparency.

Business Benefits

Managers save time gathering data from different areas of Workday when preparing for career conversations with their direct reports and looking for upskilling opportunities for their team.

Employees and managers benefit from effective career conversations that are enriched by insights from Talent Highlights, helping to drive career development and team performance.

Talent Highlights can help guide new managers, making it faster and easier for them to approach their first rounds of career conversations.

Use Cases

Managers can:

- Use the strengths and growth opportunities from Talent Highlights to quickly prepare for career conversations like check-ins and performance reviews.
- Include Talent Highlights as part of a journey for new managers to ensure that they start to become familiar with their direct reports.
- Generate or view Talent Highlights in context while completing business processes related to talent and performance on the Worker business object.

Questions to Consider

Question	Considerations
What languages does your workforce use?	Talent Highlights supports only English, both for source data and for the content that the feature generates.
Do local regulations impact your organization's use of generative AI in one or more locations?	You can exclude employees from the feature based on their location or location hierarchy.
Do you want to show specific instructions, such as guidelines or policies for the use of AI tools in your organization?	You can configure help text to give specific instructions to managers while they generate and view Talent Highlights content.
How many workers in your organization are eligible for Talent Highlights?	For managers to generate Talent Highlights for a worker, the worker needs to meet eligibility conditions including worker type, location, and amount of recent talent data. See Concept: Talent Highlights on page 1791. Consider creating a custom report using the Eligible for Talent Highlights report field to determine the level of eligibility in your organization.
Where do you want to surface Talent Highlights?	Talent Highlights provide the most value when used in context where managers complete their work. To make Talent Highlights easier to access, you can set up the Manager Insights Hub, embed Talent Highlights elsewhere in Workday, or both. When you set up the Manager Insights Hub, managers have quick access to generating Talent Highlights, viewing the content, and seeing employee eligibility, alongside other common manager tasks.

Question	Considerations
	You can also enable managers to view and generate Talent Highlights elsewhere in Workday, such as in journeys, business processes, and dashboards. Example: You add the Most Recent Talent Highlights for Worker report as an embedded analytic in a performance review.
Which product areas does your Workday subscription include?	To use Talent Highlights, your Workday subscription must include the Talent Optimization product area.
How does Talent Highlights work with other Talent features?	You can generate and view Talent Highlights content in other areas of Workday through embedded analytics and direct links to the Generate Talent Highlights task. Managers can then use Talent Highlights as background context or a starting point for their work. Example: Managers can copy the content into an employee review.

Recommendations

To provide a more convenient entry point to Talent Highlights tasks and reports, Workday strongly recommends implementing the Manager Insights Hub. See Steps: Set Up Manager Insights Hub on page 2940.

You can also add Talent Highlights tasks and reports to business processes, journeys, or dashboards for easier access.

Requirements

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.

- Your Workday subscription must include the Talent Optimization product area.
- To provide source data for Talent Highlights, you must enable performance review comments or public feedback.

Limitations

- Talent Highlights supports English only, both for source data and for the content it generates.
- Contingent workers are not eligible.
- AI assistance is not available if an employee's valid source data exceeds the capacity of Workday's AI model, typically over 100,000 words.
- Talent Highlights supports Workday data only for source data.
- Talent Highlights are unavailable in the Workday mobile application and in mobile browsers.

Tenant Setup

(Optional) Use the Edit Tenant Setup - HCM task to configure these settings for the Generate Talent Highlights task:

- Location exclusions.
- Location hierarchy exclusions.
- Help text.

Security

Configure these domains in the Manager Insights Hub functional area:

Domains	Considerations
Worker Data: Talent Highlights	Enables users to view, generate, edit, and delete Talent Highlights for their eligible direct reports, and to see their team's eligibility.
Set Up: Talent Highlights	Enables users to set up Talent Highlights, view employee eligibility, and view Talent Highlights content from different supervisory organizations.

Business Processes

No impact.

Reporting

Reports	Considerations
My Team's Talent Highlights Eligibility	View details about worker eligibility and access the Generate Talent Highlights for Employee task.
Most Recent Talent Highlights for Worker	View the worker's most recent talent highlights content. This report is enabled as a related worklet, so you can embed it in a business process that is based on the Worker business object and supports embedded analytics.
View Team Talent Highlights	View Talent Highlights content for workers by supervisory organization.

The Talent Highlight Data Source report data source (secured to the *Worker Data: Talent Highlights* domain) enables you to create custom reports showing data about Talent Highlights.

The Eligible for Talent Highlights report field (secured to the *Set Up:Talent Highlights* and *Worker Data: Talent Highlights* domains) enables you to create custom reports showing the eligibility of workers in your organization.

Integrations

No impact.

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.

Related Information

Concepts

Setup Considerations: Manager Insights Hub on page 2933

Tasks

Steps: Set Up Talent Highlights on page 1790

Steps: Set Up Manager Insights Hub on page 2940

Examples

Workday Community: Talent Highlights AI Fact Sheet

2025R1 Feature Release Note: Talent Highlights

Steps: Set Up Talent Highlights

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- To use Talent Highlights, your Workday subscription must include the Talent Optimization product area.
- Review Setup Considerations: Talent Highlights on page 1786.

Steps

1. (Optional) Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.

   On the Innovation Services Opt-In task, select the HCM Machine Learning GA Features on the Available Services tab in the HCM category.

   Note: Opting in to the HCM Machine Learning GA Features service is required for MSA customers to enable Talent Highlights, but no additional data category contributions are required.
2. Edit Domain Security Policies.

   Configure these domains in the Manager Insights Hub functional area:

   - *Worker Data: Talent Highlights*: Managers need View and Modify permissions to view, generate, edit, and delete Talent Highlights for their eligible employees, and to see their team's eligibility.
   - *Set Up: Talent Highlights*: Administrators need View and Modify permissions to set up Talent Highlights and to see Talent Highlights content by supervisory organization.
3. Activate Pending Security Policy Changes.
4. (Optional) Complete the Edit Tenant Setup - HCM task.

Option	Description
Talent Highlights Help Text	Add help text to the Generate Talent Highlights for Employee and View Talent Highlight tasks.

Option	Description
Talent Highlights Location Exclusion	Select locations to exclude from Talent Highlights. Employees with an active primary or additional position in an excluded location are ineligible for Talent Highlights.
Talent Highlights Location Hierarchy Exclusion	Select location hierarchies to exclude from Talent Highlights. Employees with an active primary or additional position within an excluded location hierarchy are ineligible for Talent Highlights.

Security: *Set Up: Tenant Setup - HCM* in the System functional area.

5. (Optional) Add Talent Highlights tasks and reports elsewhere in Workday.

   For example:

   - Add the Generate Talent Highlights task as a To Do item in business processes related to employee reviews. To exclude ineligible workers, you can configure a business process rule based on the Eligible for Talent Highlights report field.
   - Add the Generate Talent Highlights task as a step in a journey for managers.
   - Add the Most Recent Talent Highlights for Worker report as an embedded analytic in a business process based on the Worker business object. See Add Worklets to Business Processes on page 2969.

Next Steps

- Configure data purge for Talent Highlights content. Depending on location, purging Talent Highlights data helps you comply with local and national policies and regulations.

  Talent Highlights data is included in these purgeable data types when running a purge task or creating a purge plan on the Worker business object:

  - For active workers: Talent Highlights. Purging this data type does not purge the source data used to generate the Talent Highlights content.
  - For terminated workers: Talent - All Worker's Performance, Goal and Skill Data.

  See Steps: Purge Person Privacy Data.
- For MSA customers, consider opting in to the updated Worker Profile Data category to contribute the Talent Highlights for Active and Terminated Workers collection. Workday uses this data for ongoing feature evaluation, improvements, and for additional product support troubleshooting.

Related Information

Concepts

Concept: Talent Highlights on page 1791

Examples

Workday Community: Talent Highlights AI Fact Sheet

Concept: Talent Highlights

Talent Highlights are draft lists of an employee's strengths and opportunities, generated by AI from the employee's recent talent data in Workday. Managers can use Talent Highlights to:

- Save time preparing for career conversations.
- Get insights about the employee's performance from across multiple sources of talent data.
- Start to get to know a new direct report.
- Learn about how to approach career conversations as a new manager.

Talent Highlights content surfaces in a rich text editor, so managers can edit it. To ensure human oversight, managers must also confirm their review of the content before they save it. Managers can use the content in other talent- and performance-related tasks and processes. Example: They can copy and paste content as comments in a performance review or use it for talking points during a check-in meeting.

Manager Insights Hub

Manager Insights Hub is the recommended entry point to Talent Highlights. Cards in the Overview and Performance section show the team's eligibility for Talent Highlights. For each eligible team member:

- The Talent Highlights tab shows the existing Talent Highlights content.
- A suggested action for support links to the Generate Talent Highlights for Employee task when they have no new Talent Highlights within the past 90 days.

Talent Highlights Content

Talent Highlights consist of Strengths and Opportunities, and each section can have up to 5 list items.

Each strength displays with a description, and each opportunity displays with a description and up to 3 suggested actions for addressing it.

Data Sources Panel

To increase the transparency of Talent Highlights content, managers can view the source data alongside the generated content. Workday surfaces the source data at the time of content generation on the Generate Talent Highlights for Employee and View Talent Highlight tasks. This data is a snapshot, and does not show subsequent changes.

Eligibility for Talent Highlights

Managers can only generate Talent Highlights for eligible direct reports.

Workers must meet all of these eligibility criteria:

Criteria	Details
Minimum data requirement	The worker needs a combined total of 150 words of valid talent data from 1 or both of these sources: • Public feedback. • Worker and manager comments on performance reviews. To determine what data is valid for Talent Highlights, see Reference: Talent Highlights Source Data on page 1793.
Worker type	Employees only. Contingent workers aren't eligible.
Location	Workers can't have an active primary or additional position in excluded locations, which you can configure in the Edit Tenant Setup - HCM task. See Steps: Set Up Talent Highlights on page 1790.

Reporting is available to check worker eligibility:

- You can check worker eligibility by creating a custom report with the Eligible for Talent Highlights report field, secured to the *Worker Data: Talent Highlights* and *Set Up: Talent Highlights* domains.

- Managers can check their team's eligibility and see reasons for ineligibility using the My Team's Talent Highlights Eligibility report, secured to the *Worker Data: Talent Highlights* domain.

AI assistance is not available if an employee's source data exceeds the capacity of Workday's AI model, typically over 100,000 words. When a manager accesses the Generate Talent Highlights for Employee task for this employee, Workday displays an error message in the Talent Highlights text editor. The manager can still view the employee's source talent data and enter Talent Highlights content manually.

Related Information

Concepts

Setup Considerations: Talent Highlights on page 1786

Tasks

Steps: Set Up Talent Highlights on page 1790

Reference: Talent Highlights Source Data

Considerations for Data Validity

To understand valid data sources for Talent Highlights, consider these criteria:

Consideration	Valid Data
Source type	Content from these Workday sources only: • Performance reviews. • Goals. • Public feedback. • Development items. • Job details. • Skills. • Skill interests. • Job interests. • Opportunity Graph recommendations.
Language	English data only.
Security	Only data that the manager can view.
Date	Data from the past 18 months. For some sources, only current data is valid.
Business process status	No data from incomplete business processes.
Source system	Workday data only.

Source Content Details and Date Criteria

Talent Highlights uses specific content from each type of source data, and applies specific date restrictions in each case.

Source Data Category	Valid Content	Date Criteria
Performance Reviews	Content from performance review sections and items. These comments from the employee and their primary manager: • Section comments.	Completion date within the past 18 months.

Source Data Category	Valid Content	Date Criteria
	• Item comments on Accomplishments, Competencies, Goals, Questions, and Responsibilities. Does not include comments from additional managers and reviewers.	
Public Feedback	• Public anytime feedback. • Public requested feedback. • Questions that have received public feedback.	Completed On date, when the employee received the feedback, within the past 18 months.
Goals	This content from active individual goals: • Name. • Description. • Status. • Category.	Created or updated within the past 18 months.
Development items	• Name. • Description. • Status. • Category. Does not include deleted development items.	Last Updated date within the past 18 months.
Job Details	This content from the employee's primary job profile, job interests, and suggested job profiles from Opportunity Graph: • Job profile name. • Job profile summary. • Job description. • Skill attributes.	Current data only.
Skills	• Skills. • Skill interests.	Current data only.

Related Information

Tasks

Steps: Set Up Talent Highlights on page 1790

Talent Matrix Reports

Steps: Set Up Talent Matrix Reports

Prerequisites

- Configure access to these security domains in the Performance Enablement functional area:
  - Person Data: Competencies
  - Worker Data: Performance Reviews
- Configure access to these security domains in the Talent Pipeline functional area:
  - *View: Talent Matrix*
  - *Worker Data: Talent Matrix Placement*
  - *Worker Data: Talent*
- Configure access to the *Manage: Initiatives* domain in the Projects functional area.
- (Optional) Rename terms throughout Talent using the Maintain Custom Labels task.

Context

View and interact with worker-specific talent data in your organization with talent matrix reports. You can use the Workday-delivered talent matrix reports or create custom reports using the Workday Report Writer.

- A worker's talent matrix placement displays in:
  - Profiles.
  - Worker preview cards.
  - Talent cards.

To use talent matrix reports, configure security, talent rating options, and the underlying nBox report definitions.

Steps

1. Access the Maintain Talent Matrix Setup task.

   Select a primary Talent Matrix Placement nBox Report. This report is on the Worker business object and is basis for showing a worker's talent matrix placement in Workday. If you want all talent reviewers to use a single ratings scale, select the Display Talent Matrix Review Rating check box and select the default rating scale.

   Security: *Set Up: Talent* domain in Talent Pipeline functional area.
2. Access the Maintain Employee Review Setup task if you use Performance Over Time as an axis for the talent matrix report.

   On the Worklet tab, specify the templates and rating scale to use for both Performance Over Time report types.

   Security: *Set Up: Employee Reviews* domain in Performance Enablement functional area.
3. Access the Configure Competency task if you use the Workday-delivered Talent Matrix-Performance Over time by Competency nBox report.

   Select the Use for Talent Matrix check box to specify the competency to use with the report.

   Security: *Set Up: Skills and Experience* domain in Worker Profile and Skills functional area.
4. Access the Set Up nBox Report task.

   Map rating values to each box in the talent matrix grid.

   Security: *Custom Report Management* domain in System functional area.

Next Steps

Run Talent Matrix reports.

Related Information

Concepts

Concept: Talent Matrix Reports on page 1801

Tasks

Create Custom Labels

Set Up Performance Worklets on page 1687

Create or Edit Competencies on page 125

Configure nBox Reports on page 1798

Steps: Enable Manual Talent Matrix Placement

Prerequisites

Security:

- The *Custom Report Creation* domain in the System functional area.
- The *Set Up: Talent* domain in the Talent Pipeline functional area.

Context

Managers can plot a worker's talent matrix placement with the Assess Potential task instead of having Workday determine the placement based on the worker's performance rating and potential.

Alternatively, you can create calibration programs to manage talent matrix placement.

Note: Manual talent matrix placement doesn't update after calibration completes. It only updates after completion of the *Assess Potential* business process.

Steps

1. Create a custom nBox report.
   a) Access the Copy Standard Report to Custom Report task.
   b) In the Standard Report Name prompt, select *Talent Matrix - Performance by Potential*.
   c) Give the report a meaningful Name.
   d) Click the Drill Down tab, add a row to the Drillable Fields grid, and select the *Talent Matrix Review Rating* field.
   e) Click the Matrix tab. From the Group by Field prompt under Row Grouping select the *Talent Matrix Review Rating* field.
   f) From the Group by Field prompt under Column Grouping, select the *Potential* field.
   g) Click the Drill Down tab. Add 2 rows to the Columns grid under Detail Data and select the *Potential* and *Talent Matrix Review Rating* fields.
2. Access the Set Up nBox Report task.

   Map rating values to each box in the talent matrix grid.

3. Configure the selection list for the Talent Matrix Placement prompt:
    a) Access the Maintain Talent Matrix Setup task.
    b) Click the Talent Matrix Placement nBox Report prompt and select the report you created in Step 1.
    c) Select the Enable Manual Talent Matrix Placement check box.
    d) For each box in your talent matrix, add a row to the grid, define a Box Name and ID, select a Potential value and a corresponding Review Rating, and optionally add a Description. For example:

Box Name	ID	Potential	Review Rating
Critical Talent	1	High Potential	3- Outstanding Performance
Rising Star	2	High Potential	2- Meets Expectations
Needs Coaching	3	High Potential	1- Needs Improvement
Emerging Talent	4	Medium Potential	3- Outstanding Performance
Solid Contributor	5	Medium Potential	2- Meets Expectations
Questionable	6	Medium Potential	1- Needs Improvement
Expert	7	Low Potential	3- Outstanding Performance
Specialist	8	Low Potential	2- Meets Expectations
Unsatisfactory	9	Low Potential	1- Needs Improvement

4. Access the Set Up nBox Report task to specify values for the Box Name fields you defined in Step 3d.

    This makes the *Talent Matrix Placement* report field return the correct values.

Result

(Managers) Access the Assess Potential task to select an employee's talent matrix placement. Talent matrix placement replaces the employee's potential rating. The Talent Matrix Placement field replaces the Potential field and lists the Box Names from the nBox configuration in Step 3. You can view the employee's talent matrix placement:

- On the Employee Potential report.
- On worker profiles in the Overview, Career, or Performance profile group.

Related Information
Tasks
Steps: Create nBox Reports
Steps: Calibrate Talent and Performance Ratings on page 1709
Steps: Set Up Assess Potential on page 1773

Configure nBox Reports

Prerequisites

Security: *Custom Report Management* domain in the System functional area.

Context

Each talent matrix report is based on an nBox report definition that you configure to meet your needs. You can:

- Map values for the rows and columns.
- Define labels.
- (Optional) Specify help text.

Steps

1. Access the Set Up nBox Report task.
2. Select the nBox Report that you want to configure.
3. Define the rows and columns of the nBox report.

   You can't change the source fields for the rows and columns. However, you can edit both the Row Axis Label and the Column Axis Label.

   The Field for the rows in the Talent Matrix - Performance by Potential report is *Rating - Current*. However, you can edit the Row Axis Label above the nBox Value Mapping for Vertical Axis (top to bottom) grid. You can map values for the rows of the talent matrix report:

   a) Because the talent matrix grid can range from a 2 x 2 grid up to a 5 x 5 grid, you must define and map a minimum of 2 rows and columns.
   b) Enter a Row Label and Column Label to display in the talent matrix report.
   c) Specify a Source Value for each row and column. You must map every value defined in your Workday tenant for the source field to a row or column in the nBox definition, even if the values aren't used. If you leave any source field values unmapped, you won't be able to save the nBox report definition.
4. (Optional) Define a Box Name and Help Text for each box on the talent matrix.

   Note: If you select the Enable Manual Talent Matrix Placement check box in the Maintain Talent Matrix Setup task, specify values for the Box Name in this task. If you don't, the *Talent Matrix Placement* report field displays empty values.

   Each row in the Define the Box Names section corresponds to a box in the talent matrix report. The Row and Column values are displayed to help you understand where the box displays in the matrix. You can enter a Box Name and Help Text for each box on the matrix.

Next Steps

When you run a talent matrix report, you can:

- View the nBox setup associated with the report. Select nBox > View nBox Setup from the related actions menu.
- Edit the nBox report definition for the report. Select nBox > Set Up nBox Report from the related actions menu.

Related Information

Concepts

Concept: Talent Matrix Reports on page 1801

Tasks

Steps: Set Up Talent Matrix Reports on page 1795

Run Talent Matrix Reports

Context

Talent matrix reports are based on current ratings data in Workday and have many interactive qualities. While viewing a talent matrix report, you can:

- Apply filter criteria for instant results.
- Drill down on several items in the report to see and interact with the underlying worker details.

You can't drag and drop workers from 1 box to another using Workday's delivered talent matrix reports. Placement in a particular box depends on each worker's ratings data in Workday. However, you can:

- Create a calibration program based on a talent matrix report.
- Enable manual talent matrix placement with the Assess Potential task.

Steps

1. Access a Talent Matrix report and specify report criteria.
2. Click the numbers on the talent matrix to view matrix report details:
   - The number in each box on the matrix represents the total number of workers who meet the criteria for the box. Click this number to view the list of workers who are summarized by the number. You can also tag workers for membership in a talent pool from this list.
   - The Total number in the upper right corner represents the number of workers eligible for display on the talent matrix. This is the total number of workers who belong to the organizations you selected for the talent matrix, reduced by any faceted search criteria you've applied. Click this number to view the total list of eligible workers.
   - The number of workers Not Shown indicates how many workers are not displayed in the matrix, out of the total number eligible to be shown. Workers might not be shown for various reasons. 2 common causes might be that the worker lacks talent information or that you do not have the appropriate security to view all the worker talent data available for the selected organizations. Click this number to view the list of workers excluded from the matrix.

   Add the number of workers displayed in all of the boxes on the talent matrix to the number of workers Not Shown to get the Total number.
3. Click an employee image or the crowd icon to view worker details.

   Each box in the matrix displays up to 100 worker images who meet the criteria for the box, based on the nBox report definition. The number of employees shown depends on your screen resolution. It might be impossible to show 100 workers on your particular display. Regardless, whenever the maximum number of worker images is reached for a particular box, a crowd icon is displayed instead of the worker images. If no employees meet the criteria for inclusion in a particular box, a zero displays and no images are shown.
4. Filter workers based on different facets.

   Faceted search enables you to dynamically filter workers and view a subset of the workers. As you apply facets to your talent matrix report, the Not Shown and Total numbers update automatically based on the current criteria.

   The faceted search area to the left of the talent matrix enables you to dynamically filter workers. Selecting specific facet values, like a specific job profile or a particular location, helps you narrow down the results so that you see only the subset of workers you want to see in the talent matrix. Next to each facet value is a number that represents how many workers meet the criteria associated with the facet value. As you apply facets to your talent matrix report, the Not Shown and Total numbers are updated automatically based on the current criteria.

Related Information

Concepts

Concept: Talent Matrix Reports on page 1801

Tasks

Add Members to Static Talent Pools on page 1806
Steps: Calibrate Talent and Performance Ratings on page 1709
Steps: Enable Manual Talent Matrix Placement on page 1796

Set Up Talent Matrix Placement Indicator

Prerequisites

Security:

- *Set Up: Talent* domain in the Talent Pipeline functional area.
- *Worker Data: Talent Matrix Placement* domain in the Talent Pipeline functional area.

Context

You can create an analytic indicator to provide a visualization of talent matrix placement in custom reports. The analytic indicator is based on the primary nBox report in your tenant. The visualization is only available for nBox reports that have a 3 x 3, 4 x 4, or 5 x 5 grid.

Steps

1. Access the View Talent Matrix Setup report.

   Determine which talent matrix report is the primary nBox report for your tenant in the Talent Matrix Placement nBox Report field.
2. Access the View nBox Setup report.

   In the nBox Box Labels grid, make a note of the values in the Box Name and Help Text columns.

   You can also export the data to Microsoft Excel.
3. Access the Create Analytic Indicator task.
   a) At the Business Object prompt, select *Worker*.
   b) At the Field prompt, select *Talent Matrix Placement*.
   c) Create a Display Option Name, such as `Talent Matrix Visualization`.
   d) For the Visualization Type, select the size of your primary nBox report, such as *nBox - 3x3*.
   e) For the Default Visualization, select *Empty Box*.
   f) (Optional) In the Default Help Text field, specify text to display when you hover over the visualization.
   g) In the Display Conditions grid, add a row for each box in your nBox grid and specify:
      - Control Field = *Talent Matrix Placement*
      - Condition = *equal to*
      - Condition Value = the box label you found in Step 2
      - Visualization = the box position
      - Help Text = the help text you found in Step 2
4. Add the analytic indicator to the Talent Matrix Placement field in custom reports.
   a) Access the Edit Custom Report task.
   b) On the Columns tab, find the Talent Matrix Placement field, click the Options prompt, and select the visualization you created in Step 3. The selection list identifies the visualization by its Display Option Name.

Example

The display conditions for a 2 x 2 talent matrix might look similar to this table:

Condition Field	Condition	Condition Value	Visualization	Help Text
Talent Matrix Placement	equal to	Needs Coaching	Row 1 Column 1	Consider reassignment
Talent Matrix Placement	equal to	Solid Contributor	Row 1 Column 2	Delivers what is required for current position
Talent Matrix Placement	equal to	Rising Star	Row 2 Column 1	Highly valued, seasoned professional
Talent Matrix Placement	equal to	Critical Talent	Row 2 Column 2	Capable of senior management

Related Information
Concepts
Concept: Analytic Indicators

Concept: Talent Matrix Reports

Workday delivers 5 talent matrix reports that enable you to view and interact with worker-specific talent data in your organization:

- Talent Matrix - Performance by Initiative Importance
- Talent Matrix - Performance by Potential
- Talent Matrix - Performance by Retention
- Talent Matrix - Performance Over Time by Competency
- Talent Matrix - Performance Over Time by Potential

Talent matrix reports use a special type of report definition called an nBox report. A matrix can be from 2 x 2 boxes up to 5 x 5 boxes in size, depending on the underlying report definition. Each box on the grid represents an employee rating.

The talent matrix grid helps you manage your workforce by providing:

- A graphical depiction of the talent strength of the organization.
- Decision support for managers, so that they create a high-performing and engaged workforce.
- A consistent structure in which to calibrate and communicate the analysis of the overall talent pool.

Talent Matrix Benefits

The Workday talent matrix reports provide specific advantages:

- You don't need to integrate or manually duplicate data to use a talent matrix.
- The Workday configurable security governs access to talent matrix reports.
- You can customize each talent matrix report type to the needs of your organization using the Set Up nBox Report task.
- A worker's talent matrix placement also displays in:
  - Profiles.
  - Worker preview cards.
  - Talent cards.
- Talent matrix reports are dynamic. You can apply filters while viewing the report to refine the results instantly.
- To tag members of the box for talent pool membership, drill down on the number in any box.

- You can print a formatted talent matrix report that duplicates the view of the talent matrix on your display, and adds:
  - Header.
  - Footer.
  - Date/time stamp.

Custom nBox Talent Matrix Reports

You can create custom talent matrix reports using the Workday Report Writer. With a custom nBox report, you define the:

- Source fields and value mappings for each axis.
- Runtime prompts.
- Drillable fields.
- Facet filters.

Note: From the related actions menu, copy a delivered talent matrix report and change the report to meet your needs.

Talent Matrix Security

The Talent Matrix security domains are:

Domain	Functional Area	Notes
View: Talent Matrix	Talent Pipeline	To view talent matrix reports
Worker Data: Talent Matrix Placement	Talent Pipeline	To view a worker's talent matrix on their talent profile
Worker Data: Performance Reviews	Performance Enablement	To view the performance overall rating in the Talent Matrix - Performance by Potential and Talent Matrix - Performance by Retention reports
Worker Data: Talent	Worker Profile and Skills	To view: • Employee potential in the Talent Matrix - Performance by Potential report • Worker retention in the Talent Matrix - Performance by Retention report
Person Data: Competencies	Performance Enablement	To view competency in the Talent Matrix - Performance Over Time by Competency report
Manage: Initiatives	Projects	To view initiatives in the Talent Matrix - Performance by Initiative Importance report

Related Information

Tasks

Configure nBox Reports on page 1798

Run Talent Matrix Reports on page 1799
Steps: Create nBox Reports

Concept: Talent Matrix Worklets

For easier access to talent matrix information, you can deploy custom nBox reports as worklets and add them to:

- The Home landing page.
- Dashboards, such as the Talent Management Dashboard, Workforce Planning Dashboard, and custom dashboards.
- Business processes, such as *Talent Reviews*, as embedded intelligence.

Except for faceted search, talent matrix worklets have the same characteristics as standard talent matrix reports.

You can optimize the appearance of a talent matrix worklet to accommodate its size constraints. In the Create Custom Report or Edit Custom Report task, specify values in the Worklet Options section to control:

- The maximum number of rows to display.
- How the report behaves when maximized.
- How often data refreshes.
- Whether to display table borders and column.

You can also personalize talent matrix worklets. Example: Managers can view different segments of their organization from a talent matrix worklet that defaults to the highest level of their organization hierarchy.

Related Information
Concepts
Concept: Custom Worklets
Tasks
Set Up Output Options for Custom Reports

Talent Pools

Steps: Manage Talent Pools

Context

There are 2 different ways that you can staff a talent pool:

- Static: You manually select workers to add them to talent pool membership.
- Dynamic: Workday determines pool membership based on the results of a saved search.

Steps

1. Create Talent Pools on page 1804.
2. (Optional) Add Members to Static Talent Pools on page 1806.
3. Select a talent pool to take action on it.

   These actions apply to all talent pool members. To exclude members, remove them from the talent pool before completing the action.

   You can't take actions or change membership on an inactive talent pool.

Related Action	Security Policy Configuration Prerequisites
Talent > Add Talent Pool to Succession Plan	*Worker Data: Succession* domain security policy.

Related Action	Security Policy Configuration Prerequisites
Talent > Remove Talent Pool from Succession Plan	*Worker Data: Succession* domain security policy.
Talent > Add Goal to Employees	*Cascade Goals* business process and security policy.
Talent > Give Award and Activity	*Give Award and Activity* business process and security policy.
Talent > Start Potential Assessment	*Start Potential Assessment* and the *Assess Potential* business processes and security policies.
Talent > Start Development Plan	*Process: Organization Development Plans* domain security policy, and set up development plans.
Talent > Start Performance Review	*Process: Employee Reviews* domain security policy, and set up performance reviews.

4. View and print talent pools.

   See Reference: Talent Pool Reporting on page 1812.
5. (Optional) Edit or inactivate talent pools.

   Access 1 or both of these tasks:

   - Edit Talent Pool

     Security: *Talent Pool: View and Edit* domain in the Talent Pipeline functional area.
   - Edit Private Talent Pool

     Security: *Private Talent Pool: View and Edit* domain in the Talent Pipeline functional area.
6. (Optional) Delete talent pools.

   Access 1 or both of these tasks:

   - Delete Talent Pool

     Security: *Talent Pool: View and Edit* domain in the Talent Pipeline functional area.
   - Delete Private Talent Pool

     Security: *Private Talent Pool: View and Edit* domain in the Talent Pipeline functional area.
7. (Optional) Access the Edit Tenant Setup - Notifications task to enable talent pool notifications.

   Configure the *Talent Pool: Communications* domain in the Talent Pipeline functional area.

Related Information

Concepts

Concept: Talent Pool Security on page 1808

Tasks

Create Custom Labels

Examples

Example: Give Administrators Access to Restricted Talent Pools on page 1810

Create Talent Pools

Prerequisites

- Use the Maintain Assignable Roles task to create a Talent Manager role, enable it for the *Talent Pool* organization type, and select the Self-Assign check box for the role.

- For dynamic talent pools, use the Find Workers report to create a saved search or a custom report to select from when creating the dynamic pool. Workday defines which workers are pools members based on the report criteria selected.
- For private talent pools, configure the security policy on the *Private Talent Pool: Create* and *Private Talent Pool: View and Edit* domains in the Talent Pipeline functional area.
- Security: *Talent Pool: Create* domain in the Talent Pipeline functional area and *Talent Pool: View and Edit* domain in the Recruiting and Talent Pipeline functional area.

Context

Create a talent pool and define whether its membership is static or dynamic. If you enable self-assignment, Workday automatically assigns you a role on the talent pools you create. You can also enable users to create private talent pools that only they can view, in which they can only see workers in their supervisory organization.

You can also use the Enterprise Interface Builder (EIB) to create and populate new talent pools or edit the membership of existing talent pools. Use the Create EIB task to generate a spreadsheet from the *Put Talent Pool* web service.

Steps

1. Access the Talent Pools report.
2. Click either Create Pool or Create Private Talent Pool to create a new talent pool.
3. (Optional) Enter a Description for the pool, which the Talent Pools report displays along with the name.

   For private talent pools, click Find Workers to begin adding members to the pool.
4. (Optional) Select the Restricted View check box.

   You can limit a manager’s view of the talent pool membership list to just those workers who are in their supervisory organization.
5. Select the method for determining talent pool membership:

   - Add members based on manual selection to create a static talent pool whose members you manually update. Static talent pools can have up to 5,000 members.
   - Add members based on saved search creates a dynamic talent pool whose members are the result of a saved search on the Find Workers report. You can only use the Saved Search report and Advanced Report within saved searches when adding members to a dynamic talent pool. A dynamic talent pool can contain up to 50,000 members.

   Note: If you use a custom report to create saved searches for dynamic talent pools, Workday recommends that you exclude the All Talent Pools and Talent Pools - Any report fields as they return workers on both static and dynamic talent pools.

   Workday displays the talent pool type in the Talent Pools task to make it easy to identify whether a talent pool is static or dynamic.
6. For a dynamic talent pool, select a Saved Search from the prompt.

   To view a dynamic talent pool or take action on it, you must have access to all the facets on the associated saved search.
7. (Optional) Use the Assign Roles grid to assign additional roles to the talent pool. As the creator of the talent pool, you automatically have access to the talent pool.

   Workday recommends that you don't remove yourself from talent pools that you create.

Next Steps

- If you created a restricted talent pool, enable the security policy on the *Talent Pool: Restricted View* domain.
- If you created a static or private talent pool, click Find Workers to begin adding members.

Related Information

Concepts

Concept: Finding Workers on page 111

Tasks

Steps: Manage Talent Pools on page 1803

Examples

Example: Give Administrators Access to Restricted Talent Pools on page 1810

Add Members to Static Talent Pools

Prerequisites

- Security:
    - *Talent Pool: Manage Membership* domain in the Talent Pipeline or Recruiting functional area.
    - *Search: Find Worker* domain in the Worker Profile and Skills functional area.
- Add the *Add to Pool* mass action under the "Advanced" tab in the report definition on custom search reports that use a data source whose primary *business object* is:
    - *Worker*
    - *Contingent Worker*
    - *Employee*
    - *External or Internal Candidate*

Context

You can add workers to static talent pools:

- Directly from the *Worker*'s profile.
- From a dynamic talent pool.
- Using the Add to Pool mass action on:
    - The Find Workers report.
    - A custom search report.

Static talent pools can have up to 5,000 members.

Note: You can also use the Enterprise Interface Builder (EIB) to add or update talent pool members. Use the Create EIB task to generate a spreadsheet from the *Put Talent Pool* web service.

Steps

- Directly from the Worker's Profile
    a) Click the tag icon:
        - Next to the worker's photo
        - On the preview card that you access from a worker's related actions menu.

    b) Select 1 or more talent pools from the prompt.
- From a Dynamic Talent Pool
    a) Access the View Talent Pool report.
    b) Select a dynamic talent pool.
    c) Click the Members tab.
    d) Click the tag icon, and then select 1 or more static talent pools from the prompt.

- Using the Find Workers Report or a Custom Search Report
    a) Access the Find Workers report or your custom search report.

       The custom report must use a data source with a primary business object listed in the prerequisites.

       Enable *Add to Pool* in the Mass Actions section on the Advanced tab of the report definition of the custom report.
    b) Select the facets to filter workers.
    c) Select individual or all workers from the results.
    d) Click Add to Pool.
    e) Select 1 or more talent pools from the prompt.

Next Steps

To remove a member from a static talent pool, click Actions for the talent pool and select Edit Members. Select the members that you want to remove from the pool.

Related Information

Concepts

Concept: Finding Workers on page 111

Tasks

Steps: Manage Talent Pools on page 1803

Steps: Set Up EIBs Using Templates from Web Service Operations

Concept: Talent Pools

A talent pool enables you to create and act on a group of employees, without regard to organizational boundaries. You can establish the criteria that determine the membership of a talent pool. Examples are:

- Potential for inclusion in a special project.
- Potential to contribute individually at a higher level than peers.
- Particularly strong management potential.
- Need to be placed on a development plan.
- Education, certification, or experience that could be applied to a new business venture.
- Specific training, work history, or skills that could make the workers valuable outside of their current supervisory organization.

Unlike supervisory organizations, which define hierarchical structure, talent pools define a loose association of members that cut across organizational lines. You can create as many as you need, for any purpose you want, and members can belong to multiple pools.

You can create static or dynamic talent pools. You add members manually to static talent pools. Dynamic talent pools are based on the results of saved searches on the Find Workers or similar custom reports.

When you take related actions on talent pools, the same action starts for all members in the pool at the same time. Workday initiates and completes a set of individual business processes in parallel for each member of the talent pool. Based on how the business process is configured, it may follow a different approval or management chain for each member in the pool.

The only exception occurs when you give a non-monetary award to a static talent pool. In this case, the business process runs as a single process on the entire pool and completes automatically. You can tailor this business process. Example: Add an approval step. Perform a mass cancel on this process.

Related Information

Tasks

Steps: Manage Talent Pools on page 1803

Concept: Talent Pool Security

Talent pool information is only visible to users who have a role on the talent pool, regardless of their access to the workers or workers' organizations. To control access to talent pool information, you can:

- Create restricted talent pools.
- Create private talent pools.
- Use intersection security groups.

Talent Pool Domains

Talent Pools use these domains to secure the Talent Pool tasks:

Domain	Description
Talent Pool: Create in the Talent Pipeline functional area	Determines who can create new talent pools.
Talent Pool: Restricted View in the Talent Pipeline functional area	Restricts a manager's view of the talent pool membership list to just those workers who are in their supervisory organization. Enable this domain to manage private talent pools.
Private Talent Pool: Create in the Talent Pipeline functional area	Determines who can create private talent pools.
Private Talent Pool: View and Edit in the Talent Pipeline functional area	Determines who can view, edit, and delete private talent pools.
Talent Pool: View and Edit in the Recruiting and Talent Pipeline functional areas	Determines who can view, edit, and delete existing talent pools.
Talent Pool: Manage Membership in the Recruiting and Talent Pipeline functional areas	Determines who can tag, add, and remove members from static talent pools.
Worker Data: Succession Plan - Any in the Talent Pipeline functional area	Determines who can view talent pools in custom reports without edit access. To create a view only role for talent pools, create a custom report secured to the *Worker Data: Succession Plan - Any* domain.
Private Talent Pool (Limited Owner Access) in the Talent Pipeline functional area	Note: Workday recommends that you only enable the *Private Talent Pool (Limited Owner Access)* domain to provide users with access to private talent pools that they created after they've been removed from a role. Provides users with access to deleting private talent pools that they created after they've been removed from a role. This domain also provides them with limited access to viewing and editing some attributes, such as name, description, and inactive status. Workday recommends adding an intersection security group that includes Employee as Self and the applicable unconstrained security group that has permission to create private talent pools. See Example: Set Up the Private Talent Pool (Limited Owner Access) Domain on page 1810.

Talent Pool Roles

Since workers assigned to talent pool roles have access to talent pool member information, use caution when assigning them. A common set of roles involved in talent pools are Managers, Talent Pool Administrators, and HR Partners.

- Steve is a manager with several talent pools.
- Maria is a Talent Pool Administrator who can see all of Steve's talent pools including the members in the pools. Maria can also see the information you've configured in the talent pool reports.
- Jill is the HR Partner for Steve's organization. Although Jill also has modify permission on the *Talent Pool: Create* and *Talent Pool: View and Edit* domains, she can't see Steve's talent pools because she doesn't have a role on the talent pool.
- Maria gives Jill a talent pool role to enable her to access Steve's talent pools. Jill can see the other worker's data in the talent pool, including workers outside her organization.
- Jill creates a new talent pool for Steve's organization. Because she creates the talent pool, she automatically has a role on the talent pool.

Restricted Talent Pools

You can create a restricted talent pool to limit access to its member information. Only workers with a role on the talent pool secured to the *Talent Pool: Restricted View* domain can see restricted talent pools:

- In tasks and reports.
- At the tag prompt.
- On worker preview cards.

Restricted Talent Pools provide managers and other designated roles insight into talent pools for workers in their organizations. This restriction enables them to only access information about their own employees within the talent pool.

Private Talent Pools

Use the Create Private Talent Pool task to create private talent pools. You're the only person who can view the private talent pools that you create, and they only display the workers in your supervisory organization. You must also have security access to these domains in the Talent Pipeline functional area:

- *Private Talent Pool: Create*
- *Private Talent Pool: View and Edit*
- *Talent Pool: Restricted View*

Intersection Security for Talent Pools

To restrict access to talent pool member compensation details, you can create an intersection security group. This group restricts managers so that they can only view compensation information for workers that they manage, but enables them to view other information for the talent pool members that they don't manage.

Intersection security for talent pools requires Managers and Talent Managers to have roles and constrained role-based security groups. After you create the intersection security group for the 2 roles, replace the Manager security group on all compensation domains with the new Manager and Talent Manager intersection group. Add the Talent Manager security group to the domain.

Related Information

Concepts

Concept: Intersection Security Groups

Tasks

Steps: Manage Talent Pools on page 1803

Example: Set Up the Private Talent Pool (Limited Owner Access) Domain

This example illustrates how to set up the *Private Talent Pool (Limited Owner Access)* domain in the Talent Pipeline functional area.

Context

Managers at Global Modern Services (GMS) have permission on *Private Talent Pool: Create* and *Private Talent Pool: View and Edit* domains, enabling them to create, view, edit, and delete their own private talent pools. GMS wants to give managers the added ability to work with private talent pools that they created when they've been removed from a role on them.

Note: Workday recommends that you only enable the *Private Talent Pool (Limited Owner Access)* domain to provide users with access to private talent pools that they created after they've been removed from a role.

Prerequisites

Security: *Security Configuration* domain in the System functional area.

Steps

1. Edit Domain Security Policies.

   Add the Employee as Self security group to the *Private Talent Pool: View and Edit* domain in the Talent Pipeline functional area. Provide Employee as Self with View and Modify permissions.
2. Create an intersection security group that includes the Employee As Self and Manager (Unconstrained) security groups.
   a) Access the Create Security Group task.
   b) From the Type of Tenanted Security Group prompt, select *Intersection Security Group*.
   c) In the Name field, enter *Managers With No Role*.
   d) Click OK.
   e) From the Security Groups to Include prompt, select *Employee As Self* and *Manager (Unconstrained)*.
   f) Click OK and Done.
3. Create a security policy for the *Private Talent Pool (Limited Owner Access)* domain.
   a) Access the Create Security Policy for Domain task.
   b) From the For Domain prompt, select the *Private Talent Pool (Limited Owner Access)* domain.
   c) Select the Confirm check box.
   d) Click OK.
   e) Add a row to the Report/Task Permissions table.
   f) From the Security Groups prompt, select the *Managers With No Role* intersection security group.
   g) Select the View and Modify check boxes.
   h) Click OK and Done.
   i) Activate Pending Security Policy Changes.

Result

Managers can delete private talent pools that they created after they've been removed from a role. They also have limited view and edit access. They can edit attributes such as name, description and active status, and view attributes such as members, name, and description.

Example: Give Administrators Access to Restricted Talent Pools

This example illustrates 1 way to grant administrators full access to the members of a restricted talent pool, while limiting the access of managers to only their employees within the talent pool.

Context

Shelly is a security administrator at Global Modern Services (GMS), which has a restricted talent pool called Top Talent in its Sales and Marketing organization. Managers with permission on the *Talent Pool: Restricted View* domain can access this talent pool, but can only view their own employees in the talent pool.

Julie is the Talent Administrator for GMS and needs full access to all members of the Top Talent restricted talent pool to support the succession planning activities at GMS. Because the *Talent Pool: Restricted View* domain is limited to constrained role-based security groups and administrator roles have unconstrained access, Shelly can't add the Talent Administrator role to this domain. Shelly creates a new constrained role-based security group to give Julie access to all Top Talent talent pool members.

Prerequisites

Security: *Talent Pool: Restricted View* domain in the Talent Pipeline functional area.

Steps

1. Shelly creates a new role by:
   a) Accessing the Maintain Assignable Roles task.
   b) Creating a new role called *Restricted Talent Pool Administrator* and select *Supervisory* from the Enabled for prompt.
   c) Selecting *Security Administrator* from the Assigned by Security Groups prompt.
2. Shelly assigns the role at the level of GMS Julie needs to access.
   a) From the related actions menu of the Sales and Marketing organization, she selects Roles > Assign Roles.
   b) Shelly keeps the current date as the effective date.
   c) She assigns Julie to the *Restricted Talent Pool Administrator* role.

   Note: For access to all workers, Shelly would assign the role at the level of Global Modern Services.
3. Shelly creates a new role-based security group (constrained) for the role.
   a) She accesses the Create Security Group task.
   b) She selects Role-Based Security Group (Constrained) for Type of Tenanted Security Group.
   c) She enters *Restricted Talent Pool Administrator* for Name, and clicks OK.
   d) In the Group Criteria section, Shelly selects *Restricted Talent Pool Administrator* from the Assignable Role prompt.
   e) In the Access Rights to Organizations section, she selects Applies To Current Organization And All Subordinates.
   f) In the Access Rights to Multiple Job Workers section, she selects Role has access to the positions they support.
4. Shelly gives Julie permission to view and modify all members of the talent pool.
   a) From the related actions menu of the *Talent Pool: Restricted View* security domain, she selects Domain > Edit Security Policy Permissions.
   b) Shelly adds the Restricted Talent Pool Administrator security group to the Report/Task Permissions section and selects Modify.
5. Shelly accesses the Activate Pending Security Policy Changes task to confirm changes.
6. From the related actions menu of the Top Talent talent pool, she selects Roles > Assign Roles and assigns Julie a Talent Manager role.

Result

Now that Julie can view all the members of the Top Talent restricted talent pool, she can view their skills and experience and consider them for succession plans.

Related Information
Tasks
Create Talent Pools on page 1804
Create Role-Based Security Groups

Reference: Talent Pool Reporting

You can use these reports to:

- View and manage talent pools.
- Track changes to membership.

Note: To view or take a related action on a dynamic talent pool, you must have access to all the facets that make up the associated saved search.

Report	Description	Security
Succession Plans for Talent Pool	View any succession plans associated with a talent pool. Only static talent pools can be associated with Succession Plans.	*Worker Data: Succession* domain in the Talent Pipeline functional area.
Talent Pools	View all talent pools that you own or can access. By default, you own all talent pools that you create. From this report, you can create and take action on talent pools.	*Talent Pool: View and Edit* domain in the Talent Pipeline functional area. My Private Talent Pools section: *Private Talent Pool: View and Edit* domain in the Talent Pipeline functional area.
Talent Pool Membership Tracking	Includes members that were added or removed, the date, and who made the change.	*Talent Pool: View and Edit* domain in the Talent Pipeline functional area.
View Talent Pool	View the membership of a specific talent pool, along with the associated job, talent, compensation, and spend information for each member. Use the Configure Profile Group task to configure the reports that display in each section of this report.	These domains in the Talent Pipeline functional area: • *Private Talent Pool: View and Edit* • *Talent Pool: View and Edit*

Related Information
Tasks
Steps: Set Up Profiles and Profile Groups

Talent Data Across Workday

Steps: View Talent Across Organizations

Context

You can set up access to talent-related information for all workers across all organizations. To set up access, you can use the grade of your company or management level hierarchy.

Tiered security groups can't run:

- nBox reports.
- Calibration programs.
- The Find Workers report.
- Custom reports based on indexed data sources.

Steps

1. (Optional) Create a Compensation Grade Hierarchy on page 994.
2. (Optional) Create a management level hierarchy.

   See Set Up Management Level Hierarchies on page 526.
3. Assign the grades or management levels to your workers.
4. Create Level-Based Security Groups.

   Define the members of the compensation grade or management level-based security group:

   - *Applies to All Levels* grants membership to all grade or management levels in the hierarchy.
   - *Applies to Levels* grants membership to only the listed grade or management levels in the hierarchy.
5. Edit Domain Security Policies.

   Add the security group to the appropriate talent domain policy.

Result

Members of the level-based security group can see information for workers across organizations that have a grade or management hierarchy level below their own.

Related Information
Tasks
Create Compensation Grades on page 989

Steps: Set Up Talent Data Removal for Terminated Workers

Prerequisites

Configure the *Termination* business process and security policy in the Staffing functional area.

Context

You can configure your *Termination* business process to remove workers on the termination date or last day of work from:

- Succession plans.
- Succession pools.
- Talent pools.

Note: If you rescind the termination, Workday doesn't return the employee to the succession plans, succession pools, and talent pools.

Steps

1. Access the *Remove Worker from Talent* business process definition.

   Configure one or more of these actions or service steps:

   - *Remove Terminated Employee from Succession Plan*.
   - *Remove Terminated Employee from Succession Pool*.
   - *Remove Terminated Employee from Talent Pool*.
2. (Optional) Create Custom Notifications for the steps.

   Notifications for talent pools or succession pools must trigger On Exit and use one of these report fields as the Related Instances:

   - Succession Pools Affected by Remove Worker from Talent.
   - Static Talent Pools Affected by Remove Worker from Talent.
3. Access the *Termination* business process definition.
   a) Add the *Remove Worker from Talent* action step after the completion step of the business process definition.
   b) (Optional) From the related actions menu on the *Remove Worker from Talent* step, select Business Process > Maintain Step Delay to execute this step on the last day worked.
4. (Optional) Access the Edit Succession Pool or Edit Talent Pool task.
   a) Select a Succession Pool or static Talent Pool to exclude from the termination process.
   b) Select the Exclude from Termination check box to prevent Workday from removing terminated workers from the pool.

      Security: *Talent Pool: View and Edit* domain on the Talent Pipeline functional area.

Related Information

Concepts

Concept: Termination Impact on page 710

Tasks

Steps: Manage Succession Plans on page 1777
Steps: Manage Talent Pools on page 1803

Workforce Metrics

Create Custom Metrics for HCM

Prerequisites

- Set up a fiscal schedule using the Create Fiscal Schedule task.
- Create and configure metric sets by organization type using the Maintain Analytic Scorecard Profiles and Metric Sets task.
- Security: *Metric Management* domain in the System functional area.

Context

Create custom metrics for workforce scorecards to give executives and HR leaders insight into the health of their organizations. You can create multiple custom metrics based on the delivered metric calculations. You can then add these metrics to scorecard dashboards that tailor to meet the needs of different audiences.

The delivered metric calculations use information that exists in Workday, making them easier to set up than metrics based on external data. You also have greater control over sensitive data because the metrics adhere to your existing security configuration.

Steps

1. Access the Create Custom Metric task.
2. Specify basic metric information:

Option	Description
Metric Set	Select the metric set to associate with the custom metric. The metric set defines the organization type, fiscal schedule, and other configurations.
Metric	Enter a custom metric name.
Workday Metric Calculation Name	Select the Workday-defined metric calculation.

3. On the Edit Custom Metric page, configure the metric on these tabs:

Option	Description
Metric Source	In the Actual Amount field, select *Workday Algorithm*. Optionally, specify whether to track target and benchmark amounts.
Calculation Configuration	Customize the metric calculation to meet your needs. The available options vary by metric type. Not all delivered metric calculations are configurable.
Thresholds	Create thresholds and limits that determine the metric status displayed on the scorecard.
About This Metric	Enter a description that helps scorecard users understand how to interpret the metric. The description displays when you hover over the metric value on the scorecard. You can also provide links to standard or custom reports as drill-to reports.
Recommended Actions	Specify actions that business leaders can take when the metric status is Bad, Warning, or Good. The recommended actions display on all scorecards that include the metric, whereas the comments added by scorecard reviewers are specific to a particular organization and time period.

Next Steps

- Create composite reports to display the metrics on a scorecard dashboard.
- Update the metrics for each scorecard period by following these steps:
    - Initialize and calculate metric values.
    - Optionally, review metrics and add explanatory comments for scorecard users.
    - Publish the metric values.

Related Information

Concepts

Concept: Workday Scorecards

Tasks

Steps: Create Custom Metrics and Scorecards

Reference

Workday Community: Retired Functionality Details for Workforce Metrics and Executive Workforce Scorecard

Concept: Management Reporting Dashboard

The Management Reporting Dashboard (secured to the *Management Dashboard: Management Reporting Dashboard* domain in the System functional area) is a configurable workspace that gives managers quick visual insight into their workforce operations with a set of reports. Use the Maintain Dashboards task to configure the dashboard and select up to 6 reports to display on the dashboard.

To use the scorecard metric reports, you must:

- Enable scorecards in your Workday tenant.
- Configure access to the *Management Dashboard: Management Reporting Dashboard* and *Metrics Published* domains in the System functional area.
- Activate and configure the *HCM* metric set.
- Initialize, calculate, review, and publish metric values for the Workday-delivered metrics in the *HCM* metric set.

Once you configure it, managers can place this dashboard as a worklet on their Workday Home landing page.

Workday provides these reports for you to display on the dashboard as worklets:

Report	Description	Domain
Are we Paying for Performance?	Displays the base pay range segments by performance rating for workers in the selected organization.	*Worker Data: Headcount Reports* domain in the Staffing functional area.
Compensation History for Worker(s)	Displays compensation changes for the selected workers.	*Reports: Manager* domain in the Staffing functional area.
Dashboards	Displays links to launch other dashboards.	*Worklet: Dashboard* domain in the System functional area.
Direct Reports Compensation Summary	Displays compensation summary for all direct reports of the user.	*Reports: Manager* domain in the Staffing functional area. *Worker Data: Compensation for Managers* domain in the Core Compensation functional area.
Expenses for My Organizations	Displays the monthly expenses for your organizations.	*Worker Data: Expense Report* domain in the Expenses functional area.
Headcount and FTE by Month	Displays headcount and FTE by month.	*Trended Worker Data* domain in the Staffing functional area.
Headcount by Years of Service	Displays the headcount by years of service for the selected organization.	*Worker Data: Headcount Reports* domain in the Staffing functional area.

Report	Description	Domain
My Direct Reports Staffing History	Displays the staffing changes for all of your direct reports.	*Reports: Manager* domain in the Staffing functional area.
New Hire Turnover	Displays the turnover count by termination quarter and the service time completed by the workers at the time of the termination.	*Worker Data: Active and Terminated Workers* domain in the Staffing functional area.
Open Job Requisitions by Organization - Indexed	Displays open job requisition details of the selected organization.	*Indexed Data Source: Job Requisitions* domain in the Pre-Hire Process and Staffing functional areas.
Organizational Attrition Within Last 6 Months	Displays attrition data within the last 6 months by termination quarter.	*Worker Data: Active and Terminated Workers* in the Staffing functional area.
Organizational Headcount by Location by Management Level	Displays the worker headcount per management level, per location.	*Worker Data: Headcount Reports* in the Staffing functional area.
Organization Members (with Photo)	Displays general roster information for the selected organization.	*Worker Data: Headcount Reports* in the Staffing functional area.
Outstanding Actions for My Direct Reports	Displays the outstanding business process events for your direct reports.	*Reports: Manager* domain in the Staffing functional area.
Processes Awaiting Me	Displays the first 50 business process transactions awaiting your action.	*Workday for Outlook* domain in the System functional area.
Scorecard Metric Trend	Displays past and current values of a metric over a specified number of scorecard periods.	*Metrics Published* domain in the System functional area.

Related Information

Concepts

Concept: Workday Scorecards

Tasks

Steps: Create Custom Metrics and Scorecards

Steps: Set Up Dashboards and Landing Pages

Reference: Workforce Composition Dashboards

Secured to the *Trended Worker Data* domain in the Staffing functional area, workforce composition dashboards help with understanding historical trends for workforce metrics. Composition dashboards help leaders, HR business partners, and managers understand historical trends.

You can configure 5 dashboards that contain a total of 30 worklets built on the Trended Workers data source. The Trended Workers data source is a prerequisite in order to turn on these dashboards in your tenant.

Required prompt settings for all dashboards:

- Organization - Multi-Instance

- Include Subordinate Organizations
- Start Date
- End Date - This value must be the last day of a historical month to populate values of the dashboards.

You can configure these 5 dashboards using the Maintain Dashboards task:

- Distribution Trends and Analysis Dashboard

  Security: *Management Dashboard: Distribution Trends and Analysis* domain in the System functional area.

Worklet Name	Domains	Calculations
Global Footprint	*Worker Data: Current Staffing Information*	• Ending Headcount
Growth Rate by Job Family Group	*Worker Data: Current Staffing Information*	• Ending Headcount
Headcount and Average YOS by Age Range	*Person Data: Date of Birth* *Worker Data: Current Staffing Information*	• Ending Headcount • Average Length of Service in Years including Partial Year
Headcount by Management Level	*Worker Data: Current Stating Information*	• Ending Headcount
Headcount Growth and Analysis		• Ending Headcount
Workforce Tenure - Yearly Trend	*Worker Data: Current Staffing Information*	• Ending Headcount

- Diversity Dashboard

  Security: *Management Dashboard: Diversity* domain in the System functional area.

Worklet Name	Domains	Calculations
Employee Population Trend by Gender	*Person Data: Gender*	• Ending Headcount
Ethnicity / Management Level Analysis	*Person Data: Ethnicity* *Person Data: Ethnicity*	• Ending Headcount
Male / Female Distribution	*Person Data: Gender*	• Ending Headcount
Male / Female Workforce Majority by Country	*Person Data: Gender*	• Ending Headcount
Manager Composition by Ethnicity and Years of Experience	*Person Data: Ethnicity* *Worker Data: Compensation by Organization* *Worker Data: Current Staffing Information*	• Ending Headcount • % Managers • Average compa-ratio • Average Years in Position
People Manager Proportions	*Person Data: Gender*	• Ending Headcount

- Headcount Movement Dashboard

  Security: *Management Dashboard: Headcount Movement* domain in the System functional area.

Worklet Name	Domains	Calculations
Hires by Age Group	*Person Data: Date of Birth*	• Hire Count
Promotion Rate		• Promotion Rates = Promotion Count / Ending Headcount
Voluntary Terminations by Management Level	*Worker Data: Current Staffing Information* *Worker Data: Active and Terminated Workers*	• Voluntary Termination Count
Quarterly Turnover Rates	*Worker Data: Active and Terminated Workers*	• Voluntary Turnover Rates = Sum Voluntary Termination Count / ((Ending headcount of previous period + ending headcount)/2) • Involuntary Turnover Rates = Sum Involuntary Termination Count / ((Ending headcount of previous period + ending headcount)/2)
Employee Movement	*Worker Data: Organizations*	• Hire Count • Transfer In • Transfer Out • Termination Count • Ending Headcount

- Performance and Potential Dashboard

  Security: *Management Dashboard: Performance and Potential* domain in the System functional area.

Worklet Name	Domains	Calculations
Retention for High Potential Employees	*Worker Data: Talent*	• Ending Headcount
Avg. Compa-Ratio by Potential	*Worker Data: Talent* *Worker Data: Compensation Pay Range*	• Average Compa-ratio
Avg. Compa-Ratio by Performance Over Time	*Worker Data: Performance Reviews* *Worker Data: Compensation Pay Range*	• Average Compa-ratio
Management Level by Potential	*Worker Data: Current Staffing Information* *Worker Data: Talent*	• Ending Headcount

Worklet Name	Domains	Calculations
Performance by Hiring Source	*Worker Data: Current Staffing Information* *Worker Data: Performance Reviews*	• Ending Headcount
Terminations by Performance	*Worker Data: Performance Reviews*	• Terminations Count

- Structure Dynamics Dashboard

  Security: *Management Dashboard: Structure Dynamics* domain in the System functional area.

Worklet Name	Domains	Calculations
Worker Proportion Trends	*Worker Data: Current Staffing Information*	• Manager Count • Employee Count = (Ending Headcount - Manager Count)
Manager Headcount by Management Level	*Worker Data: Current Staffing Information*	• Ending Headcount
Span of Control by Job Family Group	*Worker Data: Current Staffing Information*	• Average Span of Control (default displayed on charts) = (Ending Headcount - Manager Count) / Manager Count • Average Span of Control (Headcount to Manager) = Ending Headcount / Manager Count
Span of Control by Range of Direct Reports	*Worker Data: Current Staffing Information*	• Manager Count
Span of Control - Manager Outliers	*Worker Data: Public Worker Reports* *Worker Data: Current Staffing Information*	• Number of Direct Reports (~Employees~)

Related Information

Tasks

Steps: Set Up Dashboards and Landing Pages

Set Up Worklets

FAQ: HCM Metric Calculations

How do metric calculations for a cost center hierarchy count workers on subordinate nodes?	Cost center hierarchy nodes don't contain workers. The metric calculations only count workers in the cost centers that are part of the subordinate nodes.
Why don't my metric values match my custom matrix report results?	Calculated metric values might differ from custom matrix report results that you use as a benchmark source for your metrics. Reports use the latest

data from the data source when you run the report, while analytic metric values are a snapshot from the time that you calculate the metrics. Analytic metric values don't include any data that has:

- An effective date after the date of the snapshot.
- An effective date before the date of the snapshot, but hasn't been processed at the time of the snapshot.

Scorecards also remove inactive organizations by default, while custom reports don’t. However, you can configure your report to filter out inactive organizations.

Talent Insight Apps

Steps: Set Up the Retention Risk Insight Application

Prerequisites

Minimum requirements include:

- At least 18 months of historical data on voluntary termination, compensation, and employee talent and performance transactions in Workday.
- Each organization selected during configuration must have a minimum 250 current employees. Workday recommends using larger organizations.

Context

The Retention Risk Insight Application identifies key talent likely to leave based on attributes similar to workers that left the organization. You can use the reports as worklets on the Retention Analysis dashboard.

Note: Retention risk analysis is restricted to only full-time employees. All workers included in retention risk analysis must have FTE = 100 percent.

Steps

1. Edit Domain Security Policies.
    a) Configure security for these domains in the Talent Insight Apps functional area:
        - *Retention Risk*
        - *Retention Risk Factors*
    b) Configure security for these domains in the System functional area:
        - *Management Dashboard: Retention Analysis*
        - *Set Up: Tenant Setup - Insight Applications*
    c) Configure security for the *Trended Worker Data* domain in the Staffing functional area.

2. Configure Talent Insight Applications on page 1822.

   Configure the Retention Risk Insight Application to meet your business requirements. You can:

   - Enable analysis.
   - Select the supervisory organizations you want to include. Selected organizations must have at least 250 workers and can't be a subordinate of another selected organization.
   - Filter employees out of the analysis. Example: European Union workers.
   - (Optional) Override the default report fields with your own calculated or custom fields.
3. Access the Activate Pending Security Policy Changes task to confirm changes.
4. Steps: Set Up Dashboards and Landing Pages.

   Set up the Retention Analysis dashboard. Add worklets as needed.

Next Steps

Access the Retention Analysis dashboard to gain insight into retention risk data for your organization.

Configure Talent Insight Applications

Prerequisites

Security: *Set Up: Tenant Setup – Insight Applications* domain in the System functional area.

Context

Depending on the Insight App you're using, you can analyze a variety of tracked data supporting predictive analytics. This data can range from employee termination reasons to total amount due for an invoice. You can configure which data your Workday Insight Applications use within your Workday tenant.

Steps

1. Access the Configure Insight Application task.
2. As you complete the task, consider:

Option	Description
Enable Analysis	The data you need to complete the analysis might not be available when you configure an Insight Application. We recommend that you enable the analysis after: • You complete the configuration process. • You're confident the data is available.
Exclude from Analysis	Select a calculated field. The calculated field must use the *business object* displayed in the Filter and a true/false function.
Default Report Field	Clear the Enabled check box to exclude tenant data from your analysis. If the Default Report Field doesn't contain the data you need, select an Override Report Field that returns the data class you need.
Override Report Field	The Override Report Field calculated field must use the same effective-dated business object as the business object of the Data.

Result

Workday runs Insight Apps analysis on a specific schedule that depends on the type of data your app is tracking. For details about when your Insight App results are available, see the documentation for your specific app.

Next Steps

Set up your Insight App.

Related Information
Tasks
Steps: Set Up Dashboards and Landing Pages
Reference
The Next Level: Analyzing Talent with Dashboards, Reports, and Mobile Devices

Concept: Retention Risk Insight Application

The Retention Risk Insight Application (secured to the *Retention Risk* and *Retention Risk Factors* domains in the Talent Insight Apps functional area and the *Management Dashboard: Retention Analysis* domain in the System functional area) identifies key talent likely to leave based on attributes similar to workers that left the organization.

You can understand:

- The number of people that have voluntarily and involuntarily left the organization over the past year.
- Top termination reasons listed for the organization.
- The location with the highest number of terminations.
- Most important factors contributing to employee's retention risk in the organization.

Retention Analysis Dashboard

The Retention Risk Insight Application comprises the Retention Analysis dashboard with these worklets:

- Terminations by Tenure Category
- Top Termination Reasons
- Trending Terminations by Location
- Trending Terminations by Organization

You can access the Retention Analysis dashboard and worklets on these mobile apps:

- Workday on iPad.
- Workday on iPhone.

Related Information
Reference
The Next Level: Analyzing Talent with Dashboards, Reports, and Mobile Devices

Reference: Worklets on the Retention Analysis Dashboard

You can add these worklets to the Retention Analysis dashboard (secured to the *Management Dashboard: Retention Analysis* domain in System functional area).

Worklet	Description	Security
Terminations by Tenure Category	Displays the terminations for the selected organization and time period by these tenure categories: • Zero to 1 year.	*Trended Worker Data* domain in the Staffing functional area.

Worklet	Description	Security
	• 2 to 5 years. • 5 to 10 years. • 10 to 15 years. • 15 to 20 years. You can drill into each termination count to see the worker in the count.	
Top Termination Reasons	Displays a data visualization of the top reasons terminated employees gave for leaving the organization.	*Trended Worker Data* domain in the Staffing functional area.
Trending Terminations by Location	Displays a line graph that represents the trend of the terminations in the 5 biggest locations over time for the organization.	*Trended Worker Data* domain in the Staffing functional area.
Trending Terminations by Organization	Displays the termination counts in the selected organizations and time range. This worklet displays these termination types: • Involuntary • Regrettable • Voluntary You can drill into each termination count to see the workers in the count.	*Trended Worker Data* domain in the Staffing functional area.

Professional Profiles

Steps: Set Up Professional Profiles

Prerequisites

Security: *Security Configuration* domain in the System functional area.

Context

Add the *Professional Profile* to the worker profile so that workers can share a record of their skills, work experience, and education.

Steps

1. Edit Domain Security Policies.

   Provide access to the *Professional Profile* and each of its content areas:

Domain	Functional Area	Permissions
Person Data: Talent Statements	Worker Profile and Skills	For Report/Task Permissions, set View to Yes.

Domain	Functional Area	Permissions
Self-Service: Talent Statements		
Person Data: Education *Self-Service: Education*	Worker Profile and Skills	For Report/Task Permissions, set View to Yes.
Person Data: Job History *Self-Service: Job History*	Worker Profile and Skills	For Report/Task Permissions, set View to Yes.
Self-Service: Anytime Feedback *Worker Data: Anytime Feedback*	Performance Enablement	For Report/Task Permissions, set View to Yes.
Self-Service: Project *Worker Data: Project*	Projects	For Report/Task Permissions, set View to Yes.
Self-Service: Internal Project Experience *Worker Data: Internal Project Experience*	Worker Profile and Skills	For Report/Task Permissions, set View to Yes.
Self-Service: Skills *Person Data: Skills*	Worker Profile and Skills	For Report/Task Permissions, set View and Modify to Yes.

2. (Optional) Enable workers to import data from their resumes to their *Professional Profile*.

   See Steps: Set Up Upload My Experience on page 1826.
3. Edit Business Processes.

   Configure the *Give Feedback* business process and its security policy in the Performance Enablement functional area, as well as these business processes in the Worker Profile and Skills functional area:

   - *Manage Talent Statements*
   - *Manage Education*
   - *Manage Job History*
   - *Manage Internal Projects*
   - *Manage Work Experience*

   Skills aren't associated with business processes. Workers can add or update these items without approval.

   Note: The *Manage Education* and *Manage Job History* business processes only apply to information that you add directly to Workday, not information imported from resume upload. You can configure approvals and notifications on the *Professional Profile* business process.
4. Set up talent statements so workers can add them to their *Professional Profile*.

   See Steps: Set Up Talent Statements on page 141.
5. Enable workers to manage their education record on their *Professional Profile*.

   See Steps: Set Up Education on page 137.
6. Set up a list of job history companies.

   See Steps: Set Up Job History Companies on page 137.
7. Create a list of recognized skills.

   See Steps: Maintain Skills on page 1828.
8. Steps: Set Up Profiles and Profile Groups.

   Add the *Professional Profile* report to the worker profile in the Overview, Career, or Job profile group.

9. Configure the *Professional Profile* cards you want to display on the worker profile summary.

   You can configure these cards to display on the worker profile summary.

Card Name	Description
Education	Displays the worker's education history.
Feedback	Displays direct public feedback received by the worker.
Internal Projects	Displays the internal projects the worker contributed to.
Job Details	Displays the worker's current job details.
Job History	Displays the companies that the worker has worked for.
Skills	Displays the skills the worker added to his or her profile.
Talent Statements	Displays the talent statement for the worker.
Things in Common	Displays on another worker's *Professional Profile*, showing companies, schools, and skills that the workers have in common.
Upload My Experience	Displays on a worker's own *Professional Profile*, enabling them to upload job history and education information from a resume file.

   See Steps: Set Up Profile Cards.

Result

Workday displays the *Professional Profile* in the selected profile group of the worker profile and the Professional Profile cards on the worker profile summary. Workers can add, change, or delete their own *Professional Profile* information and upload their experience. Other workers can view the profile and provide feedback.

Related Information

Concepts

Concept: Access to Worker Information on page 76

Reference

The Next Level: Finding Your Perfect Match - How to Identify and Track Talent for Your Employees

Steps: Set Up Upload My Experience

Prerequisites

Security: *Security Configuration* and either *Business Process Administration* or *Manage: Business Process Definitions* domains in the System functional area.

Context

Enable workers to upload their work experience and education information securely from their .pdf, .doc, .docx, .htm, or .txt resume files to their profiles. Upload My Experience doesn't support image-based files.

Note: Worker data from resume files is secured as customer data without exposing it to Workday, Inc.

Steps

1. Set up profile cards to display experience on worker profiles.

   See Steps: Set Up Profile Cards.
2. Edit Domain Security Policies.

Domains	Permissions	Description
Self-Service: Upload My Experience • *Self-Service: Upload My Experience - Education* • *Self-Service: Upload My Experience - Job History* Functional Area: Worker Profile and Skills	For Report/Task Permissions, set View and Modify to Yes. For Integration Permissions, set Get and Put to Yes.	Controls whether the Upload My Experience button displays on the profile and enables workers to perform the task. The subdomain permissions enable or disable import of each subset of data. You can specify permission for the subdomain or allow it to inherit the parent's permission. Consider adding the same security groups as on the *Worker Data*-related domains related to the profile. Note: Configure integration permissions to enable workers to import their data.
Worker Data: Upload My Experience • *Worker Data:Upload My Experience - Education* • *Worker Data: Upload My Experience- Job History* Functional Area: Worker Profile and Skills	For Report/Task Permissions, set View to Yes.	Enables review of the imported information as part of the *Professional Profile* business process. The subdomain permissions enable or disable import of each subset of data. You can specify permission for the subdomain or allow it to inherit the parent's permission.

3. Create Custom Business Processes.

   Customize the *Professional Profile* business process.
4. Edit Business Process Security Policies.

   Edit the *Professional Profile* business process security policy:

   - Grant permissions to the *Employee as Self* group on these actions:
     - *Upload My Experience*
     - *Review Import Professional Profile*
     - *View All*
   - If you included an approval step in the *Professional Profile* business process, grant permissions to the roles assigned to this step. Assign these roles to the *Review Import Professional Profile*, *View All*, and *Approve* actions.

Result

Workers can add or update education and work experience by clicking Upload My Experience in their Professional Profile.

If you configure the *Professional Profile* business process to include approvals, the review steps are routed to the assigned role after each successful data import.

Skills and Skills Cloud

Skills

Steps: Maintain Skills

Prerequisites

Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Context

You can use the Maintain Skills report to manage and track skills that are important to your organization. This report lists all the maintained skills in your tenant. Through this report, you can access tasks that enable you to:

- Create and edit maintained skills that Workday adds to the report.
- Delete maintained skills you no longer want to track.
- Merge duplicate maintained skills.

Workers and candidates can create crowdsourced skills and add them to their profiles. You can use the Find Skill report to view crowdsourced skills and delete them or merge them with a maintained skill.

Note: You can also import skills from a spreadsheet with the Enterprise Interface Builder (EIB).

Steps

1. Access the Maintain Skills report.

Option	Description
Skill Category	Groups related skills in categories.
Inactive	Indicates if the skill is inactive.
Hide from Candidates	Indicates if Workday hides the skill from candidate searches on external career sites. If you enable Skills Cloud, Workday no longer displays maintained skills on external career site searches.
Exclude from Synonym Management	Indicates if Workday excludes the maintained skill from being converted into a Skills Cloud skill if it's synonymous. Workday displays this option even if you haven't enabled Skills Cloud.
In Use	Indicates if the skill is in use as a skill-enabled object or on a candidate or worker profile.
Duplicates	Indicates the number of any known duplicates merged with the maintained skill.
Mapped to External Skills	Indicates the number of external skills mapped to a maintained skill. Requires Skills Cloud.

2. Click Add or Edit to access the Create Maintained Skill task.

   Add maintained skills to the skills table.

3. (Optional) Click Edit for a skill in the report to access the Edit Maintained Skill task.

   Edit a maintained skill. To inactivate a skill, select the Inactive check box. When you inactivate a skill, Workday moves it from the Active Skills tab to the Inactive Skills tab.
4. (Optional) Click Delete to access the Delete Skill task.

   This task displays a usage count of the different areas that use the skill. Workday prevents you from deleting an active maintained skill if the skill is referenced by any of these functions:

   - Candidate Job Alerts
   - Condition rules
   - Saved search facets
   - Skill ratings
   - Skills feedback questions
   - Job profile worksheets
   - Project role requirements
   - Candidate filters
5. Click Find to access the Find Skill report.

   Delete crowdsourced skills from worker profiles or merge them with a maintained skill.

Result

- All active maintained skills are available for workers to add on their profiles.
- Candidates can add any active maintained skill that's visible to them on their profile.
- Workday automatically converts instances of the merged skills to use the parent skill on the candidate and worker.

Example

A worker enters MS Word as a skill on her profile. A candidate enters Word on his candidate profile. Using the Merge Skills task, an administrator can convert them to the maintained version of the skill called Microsoft Word.

Related Information
Reference
The Next Level: Skills versus Competencies
The Next Level: Establishing a Skills Blueprint
The Next Level: Power of Skills

Steps: Maintain Skill Categories

Prerequisites

Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Context

Create skill categories to organize and easily report on multiple skills. You can assign individual skills to multiple categories. You can also organize skill categories into category groups.

If you enabled Skills Cloud:

- You can search for Skills Cloud skills to add to categories.
- Workday displays suggested skills for your categories based on skills you select.
- Access Workday-delivered skill categories and skill category groups. See Steps: Set Up Workday-Delivered Skill Categories and Skill Category Groups.

Steps

1. Access the Maintain Skill Categories report.
   Define the skill categories in your tenant.
2. Access the Maintain Skill Category Groups task.
   Manage the category groups to organize your skill categories.

Next Steps

Access the Find Workers by Skill Category report to identify workers who have skills under skill categories.

Steps: Manage Skill Profiles

Prerequisites

Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Context

Skill profiles provide an easy way to organize qualifications for jobs and career paths. You can use skill profiles for reporting purposes to build a profile for a job or role. You can also use the qualifications of a skill profile as facets when you click Find Workers on the View Skill Profile report.

You can build skill profiles based on:

- Certifications
- Competencies
- Education
- Languages
- Responsibilities
- Skills
- Training
- Work Experience

Example: You frequently hire Customer Service Representatives and want to make it easier to create job requisitions. You create a Customer Service Representative skill profile specifying that candidates must have 2+ years of customer service experience, English and Spanish language comprehension, and advanced communication competency.

Workday doesn't support attaching skill profiles to job profiles or workers.

Steps

1. Access the Maintain Skill Profile Categories task.
   Create categories to organize your skill profile templates.
   Examples: Retail Sales, Implementation Projects, Corporate Marketing, and Corporate Finance.
2. Access the Create Skill Profile task.
   Create a skill profile with the applicable qualifications. Create as many skill profiles as you need.
3. To make changes to a skill profile, access the Edit Skill Profile task.
4. To view detailed information about a skill profile, access the View Skill Profile report.

Steps: Set Up Skills Fit Analysis

Prerequisites

Security: *Worker Data: Skills Reporting* domain in the Worker Profile and Skills functional area.

Context

The Skill Fit Analysis report allows you to evaluate how a subset of your workforce aligns with the skills required for a specific job profile or up to 20 skills. The report calculates the percentage of skills overlap and sorts employees accordingly, helping you quickly identify skill gaps and make data-driven talent decisions. While including skills on job profiles is recommended, it is not a prerequisite for using this task. You can optionally include machine learning (ML) suggested skills.

Steps

1. (Optional) Access the Maintain Skills and Experience Setup task, and ensure the following options are selected to include ML suggested skills:
   - Populate Suggested Skills for Workers
   - Populate Suggested Skills for Job Profiles
2. Access the Skills Fit Analysis report.
3. Review the Include Machine Learning Skills Suggestion check box. This check box is enabled by default.
4. In the Skills to Compare section, select to compare your workforce against a Job Profile or Skills. As you complete the Skills to Compare section, consider:

Option	Description
Job Profile	Select a job profile to compare.
Skills	Select up to 20 skills.

5. In the Filter Worker Population section, select filters to create a subset of your workforce to compare against skills on a job profile or selected skills. You must select 1 or more filters. The maximum number of workers supported is 10,000.
6. (Optional) Configure the Skills Fit Analysis report for users with access to the HR Partner Hub and Job Architecture Hub. If a user has access to both, the Skills Fit Analysis report defaults to display in the HR Partner Hub.
   - Job Architecture Hub is secured to the *Manage: Job Architecture Hub* domain in the Jobs and Positions functional area. See Steps: Set Up Job Architecture Hub.
   - HR Partner Hub is secured to *Worker Data: HR Partner Hub* domain in the Staffing functional area. See Steps: Set Up HR Partner Hub.

Result

Review the selected skills with the subset of your workforce. Review the Skills Fit column to determine which workers have the highest percentage of overlap with the targeted skills. You can export to an Excel spreadsheet for further analysis.

Example

Skills Fit Calculation

To determine the Skills Fit value, we divide the number of skills on the worker profile by the number of skills on the job profile or the number of skills selected in the Skills to Compare section.

Formula: (Matching Skills / Total Number of Skills) * 100

For example, you're a HR Partner accessing the Skills Fit Analysis report. You select a job profile that has 20 skills. The skills on the job profile are a mix of explicit required skills, explicit optional skills, and Workday ML inferred skills. After you submit your comparison criteria, Workday displays where your target population falls in the Worker Summary section. You see that 1 of the workers in the targeted population has 10 skills, and 6 skills in common with the job profile you selected and is displayed in the 21%-40% range in the Worker Summary.

Skills Fit for the Worker: (6/20) * 100 = 30%

The 6 skills the worker has in common with the job profile puts them in the 21%-40% range, the worker's overlap percentage with the job profile is 30%.

Related Information
Reference
2025R2 Release Note: Skills Fit Analysis
Workday AI Fact Sheets: Suggested Skills for Job Profile
Workday AI Fact Sheets: Suggested Skills on Worker Profile

Set Up Critical Skills

Prerequisites

Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Context

Skill criticalities enable you to group and classify skills that are critical in your workforce. You can create skill criticalities for certain contexts, such as specific job profiles or supervisory organizations. You can then create custom reports to identify workers with critical skills your workforce.

Skill criticalities can have maintained skills and Skills Cloud skills.

Steps

1. Access the Maintain Skill Criticalities report.
2. Click Add.
3. As you complete the Create Skill Criticality task, consider:

Option	Description
Context Type	Select the context type for the criticality. You can only assign 1 context type for a criticality.
Context	Select the job families, job profiles, or organizations where these skills are critical. This prompt doesn't display for tenant-wide criticalities.

Result

Critical skills can only be viewed through the Maintain Skill Criticalities report or in custom reports. You can view the skills of a skill category from the related actions of a skill category.

Example

You want to define a skill criticality for 2 job profiles in product development. You created 2 skill categories named *Complex Problem Solving* and *Technical* that contain skills you want to mark as critical for the job profiles. You also want to add an uncategorized *Presentation* skill to the criticality.

Field	Value
Name	*Product Developers*
Context Type	*Job Family*
Context	*Associate Product Development*

Field	Value
	Product Development
Skill Categories	*Complex Problem Solving* *Technical*
Skills	*Presentation*

Next Steps

Create a custom report to assess the critical skills in your tenant.

Manage Skills and Experience

Prerequisites

- Set up the individual skills and experiences that you want to track.
- Add skills and experience to worker profiles with the Configure Profile Group task.
- Security: *Set Up: System* domain in the System functional area.

Context

You can add, remove, and report on past and present skills and experience for workers.

Example: During talent reviews, managers and workers can have informed and specific discussions about how workers' skills and competencies have developed over time, and can discuss whether workers are ready for promotions by comparing their current skills and competencies to those required by higher job titles.

You can manage workers':

- Achievements
  - Awards
  - Activities
  - Publications
- Certifications
- Competencies
- Education
- Job History
- Internal Projects
- Languages
- Professional Affiliations
- Skills
- Training
- Work Experience
- Worker Projects

Steps

1. Add skills and experience for a worker:
    a) From the worker's related actions menu, select Talent > View Skills and Experience.
    b) Add each type of skill or experience on a separate tab.

    For certifications, competencies, professional affiliations, and schools, you can select values or create new ones if needed.

    You can also upload certification documents and view them in the Maintain Worker Document report.
2. Compare a worker's competencies to the competencies associated with their job:
    a) From the worker's skills and experience, select the Competencies tab.
    b) Click Compare to Job.

    This option is only available for workers assigned to jobs. 1 chart displays the competencies required for the job and the other chart displays additional competencies.
3. View the history of a worker's competencies:
    a) From the worker's Skills and Experience, click the Competencies tab.
    b) Click History.

Next Steps

- You can remove a worker's skills and experience unless they have pending actions.
- You can't remove competencies from a worker.
- Access the Business Process Security Policies for Functional Area report to give security groups permission to remove skills and experience.

Related Information

Concepts

The Next Level: Power of Skills

The Next Level: Establishing a Skills Blueprint

The Next Level: Skills versus Competencies

Tasks

The Next Level: Establishing a Skills Blueprint

Steps: Set Up Profiles and Profile Groups

Concept: Skills and Competencies Comparison

Comparing Skills with Competencies

Skills describe what tool sets workers need to perform the job, while competencies describe how well workers perform the job. Skills are specific learned abilities. Examples:

- Cloud Applications
- Cloud Security
- Python
- Software as a Service (SaaS)

Competencies are proficiencies workers use to achieve role objectives. Examples:

- Building Talent
- Championing Innovation
- Leadership
- Results Orientation

You can use skills and competencies to track the capabilities that users acquire from various sources. Examples include education, certifications, and languages. Knowledge of these capabilities can help you to make smart decisions in growing your organization. Skills and competencies provide different levels of configurability and insight. Familiarize yourself with both features to learn how each can support your organization.

You can use skills or competencies, or both, depending on your use cases and objectives.

Skills and competencies provide different approaches to administrative control and worker development.

Approach	Skills	Competencies
Administrative Control	Provide a user-driven approach to understanding the capabilities of your workforce. When you enable Skills Cloud, you can organize your skills catalog with less administrative maintenance. Skills Cloud also contributes to machine learning products and solutions.	Provide a high degree of control defined by the organization, and relies on administrative configuration to maintain the catalog. Competencies contribute to selected machine learning solutions for suggested learning, connections, and mentors.
Worker Development	Skills support discovery and growth for your workers. Examples: • How to bridge the skill gaps between an employee's current role and targeted future roles. • Determining what resources might support the employee in building more skills. • How to match the right people to the right job.	Competencies help improve evaluations, including reviews and retrospective conversations. Examples: • How did your competency rating compare to your target? • How do competency ratings impact overall performance ratings and compensation?

Use Cases and Maintenance

Skills and Competencies address different use cases and require different levels of maintenance.

	Skills	Competencies
Use Cases	• You need to optimize your talent (such as building, buying, or redeploying talent) based on a wide variety of technical skills, knowledge, and capabilities. • You need to build a broad and deep understanding of your workers' skill data, gaps, and trends. • You need to help your workforce understand their skill gaps to help them increase their skills. • You need to encourage a career development	• You need to rate all employees at specific, defined levels or compensation grades on 8 leadership competencies defined by your organization. • You need to rate targeted employees on 4 core values that you define for your organization. • You need detailed control over all definitions and descriptions, including proficiency rating scales, to evaluate employees by specific bands.

	Skills	Competencies
	experience based on a wide variety of technical skills, knowledge, and capabilities.	• You need to conduct assessments of various worker populations to meet compliance requirements.
Maintenance	If you don't enable Skills Cloud, or if you have customer-specific skills (such as unique or proprietary skills), you must maintain the skills in your tenant. If you enable Skills Cloud, Workday continuously maintains and updates Skills Cloud skills.	You must maintain the competency catalog in your tenant. Workday supports Competencies business processes, so you can set effective dates for any changes.

Functionality

You can use Skills and Competencies to address different methods for evaluating workers.

Function	Skills	Competencies
Assign to employees	Mark skills as critical for employees based on supervisory organization, job family, and job profile. You can also assign skills as being critical to all employees.	Assign competencies based on worker's compensation grade and management level.
Ratings	You can set ratings using skill levels. Skills support peer-to-peer rating, manager-to-direct-report rating, and self-rating. You can apply weights to different skill rating sources. You can add the *Get Feedback* step in employee review business processes to include skill ratings and surface ratings in employee reviews.	You can set targets by a worker's management level or compensation grade. Rating scales might vary by competency. Descriptions on ratings might vary based on compensation grade and management level. You can also change ratings over time and set effective dates for them.
Definitions	Skills don't support definitions. Skills Cloud skills are skills in Workday that are commonly understood in the market.	Competencies support definitions. You can change competency names and descriptions over time, and set effective dates for them.
Categorization and structure	You can set skill item categories and category groups to create an internal skills hierarchy. You can also mark skills as critical for a specific context. Examples: Job families, job profiles, or supervisory organizations.	You can set up competency classes and categories to organize a competency catalog.

Skills Cloud Features

You can use skills with or without enabling Skills Cloud. We recommend using Skills Cloud to take advantage of Workday's machine learning capabilities to:

- Collect the data to help you understand the skills of your workforce.
- Gain insight to plan for future organizational growth, including developing existing workers and hiring new ones.
- Optimize your programs for adding new skills and increasing expertise in existing skills of your workers.

Skills Cloud provides additional features when you enable it.

Features without Skills Cloud	Features with Skills Cloud
• Administrators maintain a list of skills that users can add to their profile. • Workers and candidates can create crowdsourced skills that they can't find, and add them to their profile.	• Increases the number of skills users can add to their profile. • Returns related skills based on a person's search. • Automatically performs regular background jobs that can reduce the number of skills to maintain. • Prepares your tenant for machine learning solutions from Workday.

Note: You can't disable Skills Cloud once you enable it.

For more information, see Setup Considerations: Skills Cloud on page 1844.

Related Information

Concepts

The Next Level: Power of Skills

The Next Level: Establishing a Skills Blueprint

The Next Level: Skills versus Competencies

Tasks

Steps: Set Up Competencies on page 122

Reference

The Next Level: Skills versus Competencies

Concept: Crowdsourced Skills and Experience Management

Administrators maintain libraries of recognized skills and experience that users can search for and add to their profiles. You can find recognized skills and experience on these reports:

- Maintain Certifications
- Maintain Job History Companies
- Maintain Schools
- Maintain Skills

If candidates and workers can't find certain skills and experience in your tenant, they can create crowdsourced versions to add on their profile. Crowdsourced skills and experience enable users to expand their profiles, but variations of the same crowdsourced skills and experience can create redundancies. Example: A worker creates Math as a crowdsourced skill, and a candidate creates Arithmetic.

Workday stores crowdsourced skills and experience on these reports:

- Find Certifications
- Find Job History Companies
- Find Schools

- Find Skill

To manage crowdsourced data, you can use these reports to merge crowdsourced skills and experience with recognized versions. Workday updates profiles to use the recognized versions.

You can prevent workers from creating crowdsourced skills by selecting the Disable Create New Skill for Edit Skills check box on the Maintain Skills and Experience Setup task.

If you enable this option, candidates can still create crowdsourced skills, but Workday won't migrate these crowdsourced skills to other person types. Example: When the candidate is hired, Workday won't copy crowdsourced skills from the candidate's skill profile to the worker's profile. The crowdsourced skills remain on the candidate's skill profile.

Reference: Skills Terminology

Terms	Descriptions
Canonical skills	Skills Cloud skills.
Critical skills	You can group and classify skills that you consider critical to specific contexts, such as job profiles and supervisory organizations. You can then create custom reports to identify workers and candidates with these critical skills. Critical skills can include: • Skills Cloud skills • Maintained skills See Set Up Critical Skills.
Crowdsourced skills	There are 3 types of skills: • Skills Cloud skills • Maintained skills • Crowdsourced skills Crowdsourced skills, also called unrecognized skills, are added by workers. Example: The Marketing team starts using a new video production software called ShadowBox. Workers update their profiles to list ShadowBox as one of their skills and it becomes a Skills Cloud skill. Workday Skills Cloud then manages the crowdsourced skill by automatically merging duplicates and synonyms with the Skills Cloud skill. Workday doesn’t include crowdsourced skills in search results or faceted reports. See Concept: Crowdsourced Skills and Experience Management.
Deprecated skills	Skills Cloud automatically deprecates skills when they no longer meet Workday’s standards in terms of labor market relevance and professional development usage. When Skills Cloud deprecates a skill, Workday:

Terms	Descriptions
	• Creates an inactive maintained skill with the same name as the deprecated skill. • Transfers usage data in your tenant from the deprecated skill to the new maintained skill. • Removes the deprecated skill from your tenant. See Concept: Automated Skill Management.
Duplicate skills	Duplicate skills are: • Multiple identical entries of a maintained or crowdsourced skill. • Maintained or crowdsourced skills that are exact matches to a Skills Cloud skill. Workday Skills Cloud uses machine learning to automatically merge duplicate and synonymous skills, reducing redundancies. See Concept: Automated Skill Management.
External skills	Skills that you import into Workday from a third-party system, enabling you to consolidate your skills data into 1 place and create a cohesive skills experience for your workers. See Steps: Enable Importing of External Skills.
Maintained skills	There are 3 types of skills: • Skills Cloud skills • Maintained skills • Crowdsourced skills Maintained skills, also called tenanted skills, are skills specific to your organization that you define in Workday. Administrators can add, edit, and remove maintained skills using the Maintain Skills report. Example: Your organization uses a proprietary programming language called Yukon to build software, so you add the skill Yukon Proficiency to the Maintain Skills report. See Steps: Maintain Skills.
Required skills	You can label some skills required for job profiles and job requisitions. Example: You create a job requisition for a Project Manager. You specify that Time Management is a required skill but Outlook isn't, because you know Outlook can easily be taught to the right candidate. See Concept: Candidate Skills Match.

Terms	Descriptions
Skill categories and category groups	You can group multiple skills by categories and category groups using the: • Maintain Skill Categories report. • Maintain Skill Category Groups task. Example: You create 2 skill categories called Sales and Production. In each category, you add skills relevant to that department, such as: Sales: • Customer Relations • Networking • Social Media Production: • Blueprints • Certifications to operate heavy machinery • Safety awareness You can now use skill categories to more quickly create job profiles. See Steps: Maintain Skill Categories.
Skill endorsements and ratings	Skill endorsements are when others endorse a worker's skills. When workers give feedback, they can select up to 100 skills to endorse for the feedback recipient. Workday Skills Cloud uses machine learning to suggest skill endorsements based on the skills included in the recipient’s profile and the feedback request. Skill ratings are numbers, between 1 and 5, assigned to each skill to represent proficiency. Workers can give skill ratings: • To themselves, for example as part of an quarterly performance review. • To other workers when you configure anytime feedback templates to enable skill ratings. See Steps: Set Up Skill Endorsements and Ratings.
Skill gaps	When workers’ current skills or skill levels fall short of those listed on their job profiles or don't align with the business needs of the organization. When you perform a skill gap analysis, you assess workers’ skills to identify opportunities for training, restructuring, or talent recruiting. See Concept: Candidate Skills Match.
Skill levels	The proficiency level that Workday Skills Cloud calculates for each skill, based on the skill’s sources and the weightings that you configure

Terms	Descriptions
	for each source type on the Maintain Skill Level Setup task. There are 5 customizable skill levels: 1. Beginner 2. Intermediate 3. Experienced 4. Advanced 5. Expert Note: You must enable skill ratings for Workday to calculate skill levels. Example use cases for skill levels: • You want to hire an Assistant Manager. On the job profile, you specify that the position requires level 3 leadership skills. • A year after you hire the Assistant Manager, they apply for a promotion because they've grown their leadership skills to a level 4, making them eligible for a promotion to Manager. See Steps: Set Up Skill Level.
Skill profiles	Enable you to organize qualifications for jobs and career paths. You can build skill profiles based on: • Certifications. • Competencies. • Education. • Languages. • Responsibilities. • Skills. • Training. • Work Experience. You can use skill profiles to: • Build job profiles and job requisitions. • Search for candidates and workers by the qualifications in a skill profile when you click Find Workers on theView Skill Profile report. See Steps: Manage Skill Profiles.
Skill sources	Sources are a type of skill validation. They demonstrate the worker’s proficiency with a skill and can include any relevant data from the worker's profile, such as certifications and work history. You can click any skill on a worker’s profile to see its sources.

Terms	Descriptions
	Example: When you click a worker's People Management skill, Workday opens a modal listing any people manager positions included in their work history. See Reference: Skill Sources.
Skills	An ability or application of knowledge that is needed for work. Skills are learned with practice and skill proficiency can change over time. You can add Workday skills to: • Candidate profiles. • Gigs. • Job profiles. • Job requisitions. • Learning courses. • Worker profiles. Example: An IT engineer can add skills like these to their worker profile: • JavaScript • Project management • Data encryption • Cybersecurity Then they can work on developing certain skills to match their career goals.
Skills Cloud	Workday's AI-powered tool that helps you manage skills by: • Automatically resolving duplicate and synonymous skills. • Suggesting relevant skills when you add or endorse skills on job profiles, job requisitions, and worker and candidate profiles. • Providing a database of approximately 60 thousand general skills for your workers to choose from, informed by public data sets, purchased data sets, and cross-industry customer data. See Setup Considerations: Skills Cloud.
Skills Cloud skills	There are 3 types of skills: • Skills Cloud skills • Maintained skills • Crowdsourced skills Skills cloud skills are general, tenant-nonspecific skills maintained by Workday's AI-powered Skill Cloud database, such as: • Leadership • Search engine optimization (SEO)

Terms	Descriptions
	• Time management • Word processing
Skills ontology	The structure of an organization's skills database including skill hierarchies and the relationships between jobs, skills, and workers. Example: An ontology might categorize the skill Recruiting under the larger Human Capital Management category, and specify that you can find the skill on certain job and worker profiles. When you import external skill data into Workday, you map your existing skills onto Workday's skill ontology. The Workday Skills Cloud ontology uses machine learning to continuously update itself, adapting in real time to changes both within your organization and across the labor market.
Suggested skills	You can enable Skills Cloud to use machine learning to suggest relevant skills for: • Job profiles. • Job requisitions. • Worker and candidate profiles. To view suggested skills for job profiles access the Suggested Skills for Job Profiles report, which suggests skills based on: • Text data in the job profile. • Text data (including required and optional skills) from the 10 most recently edited job requisitions under that job profile. Workday suggests up to 10 skills from each data source and updates suggestions hourly. See Concept: Skills Verification.
Synonymous skills	Synonymous skills are: • Multiple entries of a maintained or crowdsourced skill that are synonymous, but not exact matches. • Maintained or crowdsourced skills that are exact matches to Skills Cloud skill synonyms. Example: Skills Cloud may classify these as synonymous skills: • HR • Human Resources • Human Capital Management • Employee Management • People Resource Center If Human Resources is the canonical Skills Cloud skill, then Skills Cloud automatically merges all

Terms	Descriptions
	usages of the synonymous skills under the single Human Resources skill, reducing redundancies. See Concept: Automated Skill Management.
Tenanted skills	Maintained skills.

Skills Cloud

Setup Considerations: Skills Cloud

You can use this topic to help make decisions when planning your configuration and use of Workday Skills Cloud. 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

Skills Cloud is a machine-learning-powered remote collection of skills for workers and candidates to select from. You can use Skills Cloud to build qualification requirements and talent data without the need for additional maintenance. You can also use Skills Cloud to enable workers to tag skills to learning content, job catalogs, flex teams, and projects.

Business Benefits

Skills Cloud makes it easier for you to:

- Identify workers and candidates based on the skills that they select.
- Maintain skills data.

Skills Cloud also makes it easier for workers and candidates to search for relevant skills.

Use Cases

With the Skills Cloud, you can:

- Convert crowdsourced and maintained skills to Skills Cloud skills.
- Conduct structured skill assessments for workers.
- Import external and third-party skills and tag them as equivalent to Skills Cloud skills.
- Increase the number of skills for users to add to their profile without the need to maintain the Skills Cloud.
- Report on users based on the Skills Cloud skills they select.
- Improve the quality of skills data in your tenant.

Questions to Consider

Questions	Considerations
Do proprietary skills go to the cloud?	No. Workday ensures not to add proprietary skills from customer tenants to the Skills Cloud.

<table>
<tr><th>Questions</th><th>Considerations</th></tr>
<tr><td>If I opt in to contribute data from my Preview tenant, does that data go to a Preview Workday Graph?</td><td>There's only 1 Workday Graph that receives data from both Preview and Production tenants.</td></tr>
<tr><td>How does Skills Cloud impact web services?</td><td>You can load Skills Cloud skills in web services by entering reference IDs or an exact text match of a Skills Cloud skill. If there's no exact match to your text entry and no reference ID, Workday creates a:
Crowdsourced skill for workers and candidates.
Maintained skill on non-crowdsourced enabled objects.
Web services that support the Skills Cloud will continue to support crowdsourced and maintained skills.</td></tr>
<tr><td>How does Skills Cloud suggest skills to workers?</td><td>Skills Cloud displays skill suggestions when workers add and edit skills on their profiles.

For each worker, Skills Cloud suggests explicit skills culled from these sources, in this order:
Current Job Profile
Completed Projects
Previous Job Profiles
Completed Flex Team Roles
After workers add all the suggested skills from these sources, Skills Cloud uses machine learning to suggest additional AI-inferred skills.

See Suggested Skills on Worker Profile for more information.</td></tr>
<tr><td>What happens to existing skills in my tenant when Workday converts duplicate skills to Skills Cloud skills?</td><td>Workday runs a regular background job to convert duplicate skills to Skills Cloud skills. The background job only identifies crowdsourced and maintained skills as duplicates if they have an exact text match to a Skills Cloud skill.

When the background job runs, Workday deletes duplicate skills and replaces them with the corresponding Skills Cloud skill. Workday migrates usages from the deleted skill to the Skills Cloud skill.

Workday preserves tenanted translations for duplicate tenanted skills, then replaces them with Skills Cloud skills if Skills Cloud doesn't support the language.</td></tr>
<tr><td>What happens to existing skills in my tenant when Workday converts synonymous skills to Skills Cloud skills?</td><td>Workday runs a regular background job to convert synonymous skills to Skills Cloud skills. The background job identifies skills in your tenant that are synonymous with skills already in Skills Cloud.</td></tr>
</table>

Questions	Considerations
	When the background job runs, Workday deletes synonymous skills and replaces them with the corresponding Skills Cloud skill. Workday migrates usages from the deleted skill to the Skills Cloud skill. Synonymous skills no longer display on the Maintain Skills report. The background job runs hourly and evaluates 1000 skills at a time. You can exclude individual maintained skills from being converted by selecting the Exclude from Synonym Management check box on the Maintain Skills report.
How often does Workday review the skills in my tenant for matches to the latest version of the Skills Cloud?	Workday reviews the skills in your tenant on the first Wednesday of February, May, August, and November. When evaluating skills in your tenant, Workday compares the latest Skills Cloud skill in English and your tenant default language for matches.
What report fields should I use when I enable the Skills Cloud?	You can use these report fields on the *Worker* business object to report on different skill types: • All Skills for Skills Cloud skills, crowdsourced skills, and all maintained skills. • Internal Skills for all maintained skills. • Skills for Skills Cloud skills and all maintained skills.
Where does the Skills Cloud get its data?	Skills Cloud gets its data from: • Contributed data from Innovation Services Data Contribution. • Public data sets. • Purchased data sets.
What type of machine learning is the Skills Cloud?	Workday applies word representation machine learning to the Skills Cloud.
What is the difference between the HCM ML Features and Third Party Connectors GA and the Workday Graph innovation services?	The HCM ML Features and Third Party Connectors GA innovation service is a newer innovation service that supports machine learning for a variety of HCM features. With this innovation service, you can enable Skills Cloud without any data contributions. The Workday Graph innovation service specifically gives you access to Skills Cloud. With this innovation service, you must opt in to at least 1 data category to enable Skills Cloud. You need to opt in to either 1 of these innovation services to enable Skills Cloud, not both. Workday recommends opting in to the HCM ML Features and Third Party Connectors GA innovation service to enable Skills Cloud.

Recommendations

- Once you enable the Workday Skills Cloud, you can't disable it. Workday recommends you first enable Skills Cloud in a non-Production environment before enabling it in Production. Enabling the Skills Cloud can't be reversed.

  When you enable Workday Skills Cloud, Workday automatically begins evaluating skills in your tenant for potential matches, either exact or synonymous with Skills Cloud skills. Workday's automated skill management approach ensures that your users and administrators are using the most market relevant forms of skills that can be leveraged in Workday's skills-based machine learning applications. This process results in irreversible migration and replacement of tenanted skills with the most standardized form of the skill from the Workday Skills Cloud.
- After you enable Skills Cloud, to give the background jobs enough time to migrate your duplicate and synonymous skills, Workday recommends waiting at least 2 weeks before reviewing your remaining tenanted skills.
- If your tenant has more than 2,000 maintained skills, Workday recommends that you reduce the number of skills before enabling Tenanted Skills in Matching. This recommendation is to ensure the quality of the feature.

Requirements

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.

Limitations

- You can only upload and retrieve Skill Cloud skills in English using Workday Web Services.
- You can't export or view a list of skills from the Skills Cloud library.
- You can't configure what Skills Cloud skills users can view and select. You can prioritize maintained skills over Skills Cloud skills when searching for skills.
- The Tenanted Skills in Matching feature:
  - Is only available in English.
  - Doesn't support Candidate Skills Match and Skills in People Analytics.
  - Only applies to maintained skills that are on 20 different worker profiles or job requisitions that also have a Skills Cloud skill.

Tenant Setup

On the Maintain Skills and Experience Setup task:

- From the Indicate Primary Skill Search Results prompt, you can select:
  - *Skills Cloud* if you want users to select Skills Cloud skills more than maintained skills.
  - *Tenant Skills* if your tenant has a large library of maintained skills that you want prioritized in skill searches.
- Select the Include Tenanted Skills in Matching check box for Workday to use maintained skills in addition to Skills Cloud skills when calculating suggestions and recommendations. This feature impacts the results of other features, such as Career Hub and Talent Marketplace.

Security

Configure these security domains in the Worker Profile and Skills functional area:

Domains	Considerations
Set Up: Skills and Experience	Users can enable Skills Cloud and enable suggested skills to workers. Workday's

Domains	Considerations
	background jobs automatically convert duplicate skills and synonymous skills to Skills Cloud skills.
Person Data: Skill Assessment Data	Users can view skill assessment data for specified workers from the *Assess Skills* business process.
Person Data: Skills	Users can view and enter Skills Cloud skills for other users.
Self-Service: Skill Assessment Data	Users can view their skill assessment data from the *Assess Skills* business process.
Self-Service: Skills	Users can select Skills Cloud skills in the Edit Skills task.
Suggested Skills	Users can report on skill suggestions of other workers.
Person Data: Skill Level	Users can view the estimated skill level that's been generated for another worker's skills.
Person Data: Skill Sources	Users can view or select skill sources for other users.
Self-Service: External Skill Source	Users can view their own external skill source information.
Self-Service: Skill Endorsements	Users can view endorsements for their skills.
Self-Service: Skill Level	Users can view the estimated skill level that's been generated for their skills.
Self-Service: Skill Ratings	Users can view their skill ratings.
Self-Service: Skill Sources	Workers can edit skill sources on their profile.
Worker Data: External Skill Source	Workers can view external skill source data for other workers.
Worker Data: Skill Endorsements	Users can view skill endorsements for other workers.
Worker Data: Skill Ratings	Users can view skill ratings for other workers.
Manage External Skills	Use this domain to secure imported external skills and mapped external skills. This domain controls access to the web services that you use to manage external skills and mappings.

In addition to the skill source domains, users must have access to these domains to view sources on the View Skill Detail report and Edit Skill Sources task:

Domains	Considerations
In the Performance Enablement functional area: • *Self-Service: Anytime Feedback* • *Worker Data: Anytime Feedback*	Enables users to view or select public anytime feedback as a skill source.
In the Worker Profile and Skills functional area: • *Person Data: Certifications*	Enables users to view or select certifications as a skill source.

Domains	Considerations
• *Self-Service: Certifications*	
Flex Teams in the Talent Marketplace functional area	Enables users to view or select completed flex teams as a skill source.
In the Worker Profile and Skills functional area: • *Person Data: Job History* • *Self-Service: Job History*	Enables users to view or select jobs from a worker's job history as a skill source.
In the Learning Core functional area: • *Person Data: Learning* • *Self-Service: Learning*	Enables users to view or select completed learning courses as a skill source.
Worker Data: Historical Staffing Information in the Staffing functional area	Enables users to view or select positions from a worker's staffing history as a skill source.
Worker Data: Project in the Projects functional area	Enables users to view or select completed projects as a skill source.

Business Processes

You can use the *Assess Skills* business process to conduct structured skill assessments for workers. Using a 1-5 proficiency scale, you can rate job profile skills, worker profile skills, and other skills for workers. See Concept: Skill Assessments.

Reporting

Access the Innovation Service Data Details report to view which report fields you contribute for each Innovation Service data category.

You can filter by Skills Cloud skills in these reports:

- Find Candidates
- Find Mentor
- Find Workers
- Find Workers by Skills

You can also build custom reports to view skill assessment data from completed *Assess Skills* business process events.

Integrations

Use these web services to manage Skills Cloud and skills added to Skills Cloud:

Web Services	Considerations
Get External Skill Mapping	Imports skill mappings between external skills and existing Workday skills.
Get External Skill Sources	Imports external skill sources.
Get Manage Skills	Enables you to retrieve existing skills for a worker.
Get Skill Profiles	Exports skill profiles from the tenant.
Get Skill Profile Categories	Exports all skill profile categories from the tenant.
Get Skill Source Precedences	Imports all skill source precedences.

Web Services	Considerations
Get Skill Vendor	Imports skill vendors that are tagged to external skills.
Get Skills	Retrieves skill items.
Import External Skill	Imports external skills into Workday.
Import External Skill Mapping	Imports skill mappings between external skills and existing Workday skills.
Import External Skill Sources	Imports external skill sources.
Manage Skills	Allows adding and removing the skills for a worker.
Put Skill	Adds or updates maintained and remote skills if using Skills Cloud.
Put Skill Profile	Creates and edits skill profiles.
Put Skill Profile Categories	Allows you to add, edit, and remove skill profile categories.
Put Skill Vendor	Loads external skill vendors that are tagged to external skills.

These web services for other features support Skills Cloud skills but aren't dependent on Skills Cloud:

Web Services	Considerations
Create Evergreen Requisition	Creates an evergreen requisition.
Create Job Requisition	Creates a job requisition for a position in a position management supervisory organization.
Create Position	Creates and opens a position for a supervisory organization using the position management staffing model.
Edit Evergreen Requisition	Edits an evergreen job requisition.
Edit Job Requisition	Edits an existing job requisition.
Edit Position Restrictions	Edits an existing position restriction.
Get Candidates	Returns information for candidates specified in the request.
Put Candidate	Adds or updates a candidate with the information supplied in the request.
Submit Job Profile	Adds or updates a job profile.
Submit Recruiting Agency Candidate	Submits a candidate using the recruiting agency candidate process with the information provided in the request.

Connections and Touchpoints

Skills Cloud interacts with these other features in Workday:

Features	Considerations
Career Hub	Skills Cloud provides skills and suggested skills in onboarding, and Career Hub uses that data to suggest mentors, connections, and learning content.
Compensation	You can include skills-related fields in compensation review grids.
Learning	You can tag Learning lessons, courses, and programs with skills recommended by Skills Cloud. Workday provides suggested skills to administrators for learning content. Workday also uses skills to suggest learning content in Workday Learning.
People Analytics	You can use Skills Cloud to build qualification requirements and track worker capabilities in the Skills topic.
Projects	You can select Skills Cloud skills as requirements on: • Dynamic resource pools. • Project roles. • Resource plans.
Qualifications	You can select Skills Cloud skills as qualifications on: • Confidential job requisitions. • Evergreen requisitions. • Job profiles. • Job requisitions. • Positions. • Position restrictions. Workday also provides suggested skills for job profiles and job requisitions. You can also select Skills Cloud skills when creating skill profiles.
Talent Marketplace	The Opportunity Marketplace and Flex Teams applications require you to enable Skills Cloud. Workday uses Skills Cloud to recommend flex teams and job opportunities to workers. Workday also provides skill suggestions to users accessing Opportunity Marketplace for the first time. Completed flex teams are available as a skill source when a flex team host endorses a worker for a skill.
Talent Reviews	You can add Skills Cloud skills to talent review templates to collect skills data.
Workday Recruiting	You can select Skills Cloud skills for:

Features	Considerations
	• Candidates. • Confidential prospects. • Job applications. • Prospects. • Recruiting agency candidates. • Referrals. Skills Cloud also provides skills for calculating Candidate Skills Match.

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: Skills and Competencies Comparison on page 127

Concept: Skills Verification on page 1866

Concept: Skills Cloud Translations on page 1866

Concept: Automated Skill Management on page 1867

Reference

Workday Community: Available Innovation Services – Service Descriptions and Exhibits

The Next Level: Leveraging Skills Interoperability

The Next Level: Workday AI Fact Sheets

Workday Skills Cloud Resources

The Next Level: Power of Skills

The Next Level: Establishing a Skills Blueprint

The Next Level: Skills versus Competencies

Steps: Set Up Skills Cloud

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Review setup considerations for Skills Cloud.

Context

You can set up your tenant to access Skills Cloud, a library of customer-contributed worker skills that Workday shares across all Skills Cloud-enabled customer tenants.

Enabling Skills Cloud:

- Increases the number of selectable skills in your tenant.
- Reduces the need to manage maintained skills.
- Replaces duplicate and synonymous skills in your tenant with standardized Skills Cloud skills.

When a worker or recruiter adds or edits a skill in a Skills Cloud-enabled tenant, Workday:

- Returns relevant skills from Skills Cloud, in addition to skills in your tenant.
- Uses data from selections to improve future searches.

Note: After enabling Skills Cloud, your tenant continues to return Skills Cloud results even if you later decide to opt out.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   On the Innovation Services Opt-In task, select either of these services on the Available Services tab in the HCM category.

Option	Description
HCM ML Features and Third Party Connectors GA	Opt in to this service if you want to enable Skills Cloud without any data contributions.
Workday Graph	If you opt in to this service, you must also opt in to at least 1 of these data categories to enable Skills Cloud: Setup Data, Worker Profile Data, Candidate Profile Data.

   Workday recommends that you opt in to the HCM ML Features and Third Party Connectors GA innovation service to enable Skills Cloud.

   On the Maintain Innovation Services Data Selection Opt-In task, click Next.

   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.

   While not required, Workday recommends you opt in to contributing data for Machine Learning. On the Maintain Innovation Services Data Selection Opt-In task, select the check boxes to opt in to Skills Data and User Feature Delivery Data, and at least 1 additional category in either of these services in the HCM category.

   If you want to enable Tenanted Skills in Matching, you must opt in to these categories in the HCM: HCM ML Features and Third Party Connectors GA category:

   - Talent Profile Data
   - Job Requisition Data or Worker Profile Data

   When you opt out of data contribution, Workday purges your data within 30 days.

   Security: *Manage: Innovation Services* domain in the Innovation Services functional area.
2. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality.

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.

3. Enable Skills Cloud on page 1854.

   Turn on Skills Cloud and configure additional features.
4. Set up Workday so you can import external skills using Enterprise Interface Builder (EIB).

   See Steps: Enable Importing of External Skills on page 1857.
5. Edit Domain Security Policies.

   If you enabled suggested skills for workers, configure these domains in the Worker Profile and Skills functional area:

Domain	Purpose
Suggested Skills	Enables you to report on the skill suggestions of workers. Note: you don't need to contribute data through the Innovation Service for it to operate.
Person Data: Skill Sources	Enables users to view or edit the skill sources of other workers.
Self-Service: Skill Sources	Enables workers to verify skills by adding skill sources.

6. Configure the domains that secure skill source data.

   See Reference: Skill Sources on page 1869.
7. Activate Pending Security Policy Changes.
8. Configure feedback templates to include skill endorsements and skill ratings.

   See Steps: Set Up Skill Endorsements and Ratings on page 1860.
9. Generate skill levels for workers' skills.

   See Steps: Set Up Skill Level on page 1861.
10. Review and activate Workday-delivered skill categories and skill category groups. See Steps: Set Up Workday-Delivered Skill Categories and Skill Category Groups.

Result

If a user has access to skill sources, Workday directs them to the Edit Skill Sources task or View Skill Detail report when they click a worker skill. Worker skills also display the number of sources that they have.

Related Information

Reference

Workday Community: Available Innovation Services – Service Descriptions and Exhibits

Workday Community: Workday Machine Learning

Workday AI Fact Sheets: Suggested Skills on Worker Profile

Workday AI Fact Sheets: Suggested Skills for Job Profiles

Enable Skills Cloud

Prerequisites

Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.

3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

When you enable Skills Cloud, Workday automatically begins evaluating skills in your tenant for potential matches, either exact or synonymous with Skills Cloud skills. This process results in irreversible migration and replacement of tenanted skills with the most standardized form of the skill from the Workday Skills Cloud.

Note: Once you enable Skills Cloud, you can't disable it. Workday recommends you first enable Skills Cloud in a non-Production environment before enabling it in Production.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.
2. Access the Maintain Skills and Experience Setup task.
3. Select the Enable Workday Skills Cloud check box.
4. (Optional) As you complete the Skills section, consider:

Option	Description
Indicate Primary Skill Search Results	Select the type of skill that you want prioritized when a user searches for a skill. If you don't make a selection, Workday automatically prioritizes Skills Cloud skills.
Exclude Maintained Skills from Synonym Management by Default	Select this check box so that all new maintained skills created using the Maintain Skills task are excluded from the synonym management background job by default. You can clear the check box for individual skills on the Maintain Skills report. Selecting this check box doesn't automatically exclude maintained skills from synonym management when creating new maintained skills using the *Put Skills* web service.
Populate Suggested Skills for Workers	Select this check box to enable: • Skill suggestions for workers. • Workers to add sources of evidence to their skills.

Option	Description
	• Workers to view any sources of a skill on the Worker profile.
Populate Suggested Skills for Internal Candidates	Select this check box to enable Workday to provide skill suggestions to employees applying to internal job postings.
Populate Suggested Skills for External Candidates and Prospects	Select this check box to enable suggested skills when external candidates upload their resumes for job applications or external prospects upload resumes on prospect forms. To display suggested skills on prospect forms, select Enable Skills in the Prospect Introduce Yourself section of the external career site. See Create External Career Sites.
Include Tenanted Skills in Matching	Select this check box for Workday to consider maintained skills from your tenant when providing suggestions and recommendations.
Populate Suggested Skills on Job Requisitions	Select this check box to enable Workday to provide skill suggestions based on the job requisition details.
Populate Suggested Skills for Job Profiles	Select this check box to provide suggested skills for job profiles on the *Manage Job Profile* business process and in the Suggested Skills for Job Profile report. The skill suggestions update hourly and provide up to 10 suggested skills for each reporting item. You can view suggested skills for job profiles based on: • Job profile text data • Job requisition text data • Job requisition skill data
Enable Skills Self-Assessment on Worker Profile	Select this check box to enable workers to self-assess their proficiency level for skills on their worker profile. Available when you select the Populate Suggested Skills for Workers check box. Note: Separately from this option, you can also enable self-assessments on the *Assess Skills* business process.

5. (Optional) To enable Workday to suggest skills for workers based on Position History, access the Maintain Feature Opt-Ins report and opt into Position History for Skill Suggestions and Verification.

Result

Users can now select Skills Cloud skills on:

- External career sites.
- Job applications.
- Job profiles.
- Job requisitions.
- Learning.

- Positions.
- Prospects.
- Recruiting agency candidates.
- Referrals.
- Skill profiles.
- Worker profiles.

If you selected the Populate Suggested Skills for Workers check box, workers can select Workday-generated skills in the Suggested Skills section on the Edit Skills task.

Next Steps

- Configure the security policies for skill suggestions and skill sources domains.

Related Information
Reference
Workday AI Fact Sheets: Suggested Skills for Job Profiles

Steps: Enable Importing of External Skills

Prerequisites

Enable Skills Cloud.

Context

Workday enables you to import skills from external vendors using web services. Configure these steps before setting up these web services for importing skill vendors, external skills, and external skill mapping:

- *Get Skill Vendor*
- *Put Skill Vendor*
- *Import External Skill*
- *Get External Skill Mapping*
- *Put External Skill Mapping*

External skill mappings establish a relationship between an external skill and a skill that exists within Workday. This relationship establishes an equivalence between skills tracked in your third-party system and the Workday skill that reflects an equivalent meaning. You must load and establish external skill mappings before you can import externally calculated skill levels using the *Import External Skill Sources* web service.

Steps

1. Access the Maintain Skills and Experience Setup task.

   Select the Populate Suggested Skills for Workers check box.

   Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
2. Edit Domain Security Policies.

   Configure the *Manage External Skills* domain in the Worker Profile and Skills functional area to secure external skills and mapped external skills.
3. Access the Maintain Skill Vendors task.

   Enter a Skill Vendor Name to add a vendor. Workday assigns an internal reference ID to use when you import external skills from that vendor.

Result

You can now import external skills from the vendors you added.

Related Information

Reference

2022R2 What's New Post: Import External Skills

The Next Level: Leveraging Skills Interoperability

Steps: Set Up Workday-Delivered Skill Categories and Skill Category Groups

Prerequisites

Enable Skills Cloud.

Context

You can use Workday-delivered skill categories and skill category groups to report on foundational Skills Cloud skills. The categories and category groups were created by:

- Identifying foundational Skill Cloud skills through extensive analysis to ensure they are highly relevant and valuable across a wide range of industries and roles.
- Mapping foundational Skills Cloud skills to a curated hierarchy of skills from the Occupational Information Network (O*NET). For more information, see the O*NET Resource Center O*NET 29.3 Database and CC BY 4.0 License.
- Grouping semantically similar skills.
- Using AI and publicly available sources to review and update labels for the Workday-delivered skill categories and skill category groups.

This dataset includes information from the O*NET 29.3 Database by the U.S. Department of Labor, Employment and Training Administration (USDOL/ETA). Used under the CC BY 4.0 license. O*NET® is a trademark of USDOL/ETA. Workday has modified some of this dataset. USDOL/ETA has not approved, endorsed, or tested these modifications.

We display all Workday-delivered skill categories and skill category groups as inactive. You can review the Workday-delivered categories and category groups, and activate the ones that fit your requirements.

Steps

1. Access the Maintain Skill Categories report to view Workday-delivered skill categories in the Inactive Skill Categories tab.
2. Access the Maintain Skill Category Groups task and review the Workday-delivered skill category groups.

Related Information

Reference

2025R2 Feature Release Note: Skills Cloud Workday-Delivered Skill Categories and Skill Category Groups

Steps: Set Up Mass Populate Skills for Workers

Prerequisites

Enable Skills Cloud.

Context

The Mass Populate Skills for Workers task allows you to efficiently build a comprehensive skills inventory and enhance worker profiles. By mass populating skills, you save time and effort while improving talent identification and strategic talent management.

Note: If you are enabling Skills Cloud for the first time, we recommend waiting at least 2 weeks until the initial data processing is complete before running this task. See Setup Considerations: Skills Cloud on page 1844.

Steps

1. (Optional) Access the Maintain Skills and Experience Setup task and in the Skills section, consider:
    - Populate Suggested Skills for Job Profiles
    - Populate Suggested Skills for Workers
2. (Optional) Create a custom notification message that workers receive when this task identifies skills to add to their profiles. You can set up your message in Custom Notification Message for Mass Populate Worker Profile Skills in the Maintain Skills and Experience Setup task. If you don't create a custom notification message, Workday delivers a default message.
3. Edit Domain Security Policies.

    Configure access to the *Set Up: Mass Populate Worker Profile Skills* domain in the Worker Profile and Skills functional area.
4. Access the Mass Populate Worker Profile Skills task. As you complete Define Worker Population section, consider:

Option	Description
Location	(Optional) Select the physical location of a business site.
Supervisory Organization	(Optional) Select the supervisory organization. You can include subordinate organizations once this option is selected.
Workers with Fewer than Specified Number of Skills	Enter the minimum number of skills on the worker profile.

5. As you complete the Select Skills Source > Job Profile section, consider:

Option	Description
Skills from the Worker's Primary Job Profile	(Optional) Add the skills from the worker's primary job profile to their worker profile. Workday includes all of the skills from the Job Profile source.

6. As you complete the Select Skills Sources > Suggested Skills section, consider:

Option	Description
Suggested Skills for Job Profile	(Optional) Add the suggested skills based on the worker’s primary job profile.
Suggested Skills for Worker Profile	(Optional) Add the suggested skills based on the worker user profile.
Maximum Number of Suggested Skills to be Added	Enter the number of suggested skills you want to add to the worker profile. By default, we set this value to 10. You can include up to 20 suggested skills from the Suggested Skills sources. Workday includes up to the specified number of suggested skills for job profiles and worker profiles based on the relevance of the suggestions.

7. Select the Confirm You Understand This Action Can't Be Undone check box. Once you run this task, you can't rescind it. Applies to all workers who meet the criteria specified in the Define Worker Population section.

Result

Workday creates a notification for workers to review the skills populated for their worker profile. Workers retain full control of the skills on their worker profile, and can remove any skills added by the Mass Populate Worker Profile Skills task.

Related Information

Reference

2025R2 Feature Release Note: Mass Populate Worker Profile with Skills

2025R1 Feature Release Note: Mass Populate Worker Profile with Skills

Workday AI Fact Sheets: Suggested Skills for Job Profile

Workday AI Fact Sheets: Suggested Skills on Worker Profile

Steps: Set Up Skill Endorsements and Ratings

Prerequisites

Enable Skills Cloud and skill suggestions for workers. See Enable Skills Cloud.

Context

You can configure feedback templates that enable feedback providers to either endorse or rate skills for workers.

Steps

1. Edit Domain Security Policies.

   Configure these domains in the Worker Profile and Skills functional area:

   - *Self-Service: Skill Endorsements*
   - *Self-Service: Skill Ratings*
   - *Worker Data: Skill Endorsements*
   - *Worker Data: Skill Ratings*
2. Access the Create Feedback Template task.

   Select either *Enable Skill Endorsements* or *Enable Skill Ratings* in the Skills in Feedback prompt.

   Security: *Set Up: Employee Reviews* in the Performance Enablement functional area.
3. Add the Feedback for Skills report on the Feedback for Worker Profile profile group.

   See: Steps: Set Up Profiles and Profile Groups.

Result

Your workers can request feedback using any templates you configured with skill endorsements or skill ratings. When requesting feedback, workers can select up to 100 skills based on the feedback recipient's:

- Skills from their worker profile and job profile.
- Skill interests.
- Critical skills.

Based on the selected skills from the feedback request, feedback providers can:

- Select a rating or decline to rate each skill.
- Select up to 100 skills to endorse. Workday provides suggestions based on the skills from the feedback request and the skills of the feedback recipient.

Next Steps

Enable Workday to use skill ratings to calculate skill levels.

Related Information

Tasks

Steps: Set Up Feedback on page 1737

Reference

2021R2 What's New Post: Skill Level, Skill Ratings, and Skill Endorsements

Steps: Set Up Skill Level

Prerequisites

- Enable Skills Cloud.
- Select Populate Suggested Skills for Workers on the Maintain Skills and Experience Setup task.
- Enable user access to view and edit skill sources. See Reference: Skill Sources.

Context

You can enable Workday to calculate skill levels for worker skills that users can view. When workers click a skill on a worker profile, Workday displays:

- The calculated skill level.
- Different skill level sources depending on your configuration.
- A breakdown of the skill level calculation and a link to the Skill Detail report for the skill.

Workday doesn't display this information when workers click a skill on a career profile, or on Workday on Android, iPad, or iPhone. When you enable skills self-assessment on the worker profile, workers can self-rate their skill level.

Steps

1. Edit Domain Security Policies.

   Configure these domains in the Worker Profile and Skills functional area:

   - *Person Data: Skill Level*
   - *Self-Service: Skill Level*
2. Enable skill level sources. You must set up at least 1 of these sources:

Skill Level Source	Setup Information

Skill Assessment Rating	• Set up skill assessments. See Concept: Skill Assessments on page 1864.
	• To enable users to view the ratings, add them to these domains in the Worker Profile and Skills functional area:
	  ◦ *Person Data: Skill Assessment Data*
	  ◦ *Self-Service: Skill Assessment Data*
	When calculating the skill level, Workday only includes the worker's most recent skill assessment rating for each skill.

Requested Feedback Ratings	• Set up skill ratings in feedback templates. See Steps: Set Up Skill Endorsements and Ratings on page 1860.

<table>
<tr><th>Skill Level Source</th><th>Setup Information</th></tr>
<tr><td></td><td>To enable users to view the ratings, add them to these domains in the Worker Profile and Skills functional area:
Self-Service: Skill Ratings
Worker Data: Skill Ratings
When calculating the average rating for this source, Workday includes the latest rating from each user who rates the worker on this skill.</td></tr>
<tr><td>Self Assessment</td><td>Enable self-assessment on the worker profile or as a step within skill assessments. See Enable Skills Cloud on page 1854 and Concept: Skill Assessments on page 1864.
To enable users to view the ratings, add them to these domains in the Worker Profile and Skills functional area:
Self-Service: Skill Ratings
Worker Data: Skill Ratings
When calculating the skill level, Workday only includes the worker’s most recent self-assessment rating for each skill.</td></tr>
<tr><td>Externally Calculated Skill Level</td><td>Import externally calculated skill levels using the Import External Skill Sources web service. See Steps: Enable Importing of External Skills on page 1857.
Add workers to these domains in the Worker Profile and Skills functional area to enable them to view external skill levels:
Self-Service: External Skill Source
Worker Data: External Skill Source</td></tr>
</table>

3. Maintain Skill Level on page 1863.

   Specify weightings for skill level calculation and configure custom labels for skill levels.
4. (Optional) Add workers to these domains in the Worker Profile and Skills functional area and set up skill ratings in feedback templates:

   - *Self-Service: Skill Ratings*
   - *Worker Data: Skill Ratings*

   See Steps: Set Up Skill Endorsements and Ratings on page 1860.
5. (Optional) Add workers to these domains in the Worker Profile and Skills functional area to enable them to select external skills as a skill source:

   - *Self-Service: External Skill Source*
   - *Worker Data: External Skill Source*

Result

Workday calculates the skill level by averaging skill sources based on the weightings you configured on the Maintain Skill Level Setup task. If there are no sources available for a skill, Workday displays the Skill Level field as Not Applicable on the Skill Detail report.

Related Information
Reference
2021R2 What's New Post: Skill Level, Skill Ratings, and Skill Endorsements
2023R1 What's New Post: Skill Level User Interface Modal

Maintain Skill Level

Prerequisites

- Set up skill levels and enable the skill ratings that you want to use as sources to determine the overall skill level. See Steps: Set Up Skill Level on page 1861.
- Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.

Context

Workday can calculate skill levels from different types of sources. To enable skill levels, you must configure calculation weightings for 1 or more sources.

You can also create custom labels for Workday to display on a worker's skill details instead of the default skill level labels.

Steps

1. Access the Maintain Skill Level Setup task.
2. As you complete this task, consider:

Option	Description
Skill Level Rating Name Override	(Optional) Enter a custom label to use as an override for a skill level rating name. Each field corresponds to the default label that you can override. Leave these fields blank if you want to use the default rating name.
Skill Level Rating Description Override	(Optional) Enter a custom description for the rating, up to 100 characters long. Workday displays the custom description only when you access a skill from the worker profile. When you access a skill from the Career Profile, Workday displays the default rating descriptions for the self-rating scale and skill level description if an override isn't configured. Note: Workday doesn't display skill level rating description overrides on the Assess My Skills task.
Skill Level Calculation	Enter the weightings for the skill level sources that you plan to use: • Requested Feedback Ratings

Option	Description

	• Self Assessment: Workers' ratings of their own skills, which they can enter:
	  • On the Assess My Skills task on their worker profile.
	  • From My Tasks as an action in the *Assess Skills* business process.
	• Externally Calculated Skill Level
	• Skill Assessment Rating: Ratings from the Assess Skills task, which users access as an action in the *Assess Skills* business process.
	
	The weighting must total 100 percent for all the skill sources. If you don't enter a weight for 1 skill level source, Workday won't include the source when calculating skill level. If you don't enter a weight for any source, Workday won't calculate a skill level.
	
	Entering zero for the weighting does not remove the skill level source from a worker's skill level details. Users can still view the ratings for each source that they have access to.

Related Information

Reference

2022R2 What's New Post: Import Externally Calculated Skill Levels

Concept: Skill Assessments

You can use the *Assess Skills* business process to conduct structured skill assessments for workers. Skill assessments can help you better understand your workforce and facilitate better career growth conversations between workers and managers.

Using a 1-5 proficiency scale, you can rate job profile skills, worker profile skills, and other skills for workers.

Use Cases

You can enable:

- Assessors to rate skills for individual workers.
- Administrators to initiate skill assessments for up to 50,000 workers at once using the Launch Assess Skills for Worker Mass Operation Type on the Mass Operation Management task. Workday recommends that you run the mass operation on desktop rather than mobile.
- Workers to self-assess their own skills.
- Administrators to include skill assessment ratings in skill level calculations.

Requirements

To use the *Assess Skills* business process, you must set up:

- Skills Cloud. See Steps: Set Up Skills Cloud.
- The *Assess Skills* business process definition using the Create Business Process Definition (Default Definition) task.

You must set up a new or existing segment-based security group to enable managers to run the Launch Assess Skills for Worker Mass Operation Type.

Limitations

The *Assess Skills* business process doesn't support crowdsourced skills.

Mass operation skill assessments don’t process workers with:

- In-progress skill assessments, including when you launch multiple skill assessment operations at the same time that include the same worker.
- More than 100 skills selected to assess.
- No skills selected to assess.

Tasks

You can configure the Assess Skills for Worker task as an initiating action on the *Assess Skills* business process. Access this task from:

- Global search.
- The related actions menu on a worker's profile.

You can configure these tasks as allowed actions on the business process:

- Assess My Skills. Enables workers to rate their own skills.
- Assess Skills. Enables assessors to rate skills for workers.

You can use these tasks to view and report on skill assessment data:

- My Skill Assessments. Enables workers to view their own skill assessments.
- View Skill Assessments. Enables managers to view skill assessments for specified workers.

Reporting

You must set up security on these domains to enable skill assessment reporting:

- *Person Data: Skill Assessment Data*
- *Self-Service: Skill Assessment Data*

You can build custom skill assessment reports for workers using these report fields:

Business Object	Report Fields
Assess Skill Event	• Assessed Skill Ratings • Declined to Rate • Self-Assessed Skill Ratings • Skills Selected to Assess • Skills to Add to Worker Profile
New Skill	• Skill Level - Skill Assessment • Skill Level Value - Skill Assessment
Skill Ratings	• Skill Rating Source
Worker	• Assess Skill Events For Worker • Self-Ratings from In Progress Skill Assessment. Available with Embedded Analytics. • Skill Ratings for Worker

Related Information

Reference

2024R2 Release Note: Skill Assessments

2024R2 Release Note: Mass Operation Skill Assessments

Concept: Skills Verification

Workday can suggest skills to workers based on data from their worker profile, and you can enable workers to add sources of evidence on a skill.

Skill Suggestions

Skill suggestions make it easier for workers to find relevant skills based on their experience.

You can select the Populate Suggested Skills for Workers check box on the Maintain Skills and Experience Setup task to enable the suggested skills background job. Workday runs the background job hourly every day and suggests Skills Cloud skills based on a worker's:

- Completed learning courses
- Completed projects
- Job history
- Public anytime feedback
- Skills

To enable Workday to suggest skills based on Position History, you can opt into Position History for Skill Suggestions and Verification on the Maintain Feature Opt-Ins report.

Workday displays up to 10 skills in the Suggested Skills section on the Edit Skills task. The skill suggestions refresh and improve each time a worker adds a skill.

Workday doesn't suggest skills based on a worker's Certifications. Workers can manually select Certifications that contribute to skills on their worker profile.

Skill Sources

Workers can verify their skills by adding sources of evidence, such as their:

- Certifications
- Completed flex teams with a skill endorsement
- Completed learning courses
- Completed projects
- Job history
- Position history
- Public anytime feedback
- Skill endorsements
- Skill ratings

Once you enable skill suggestions, you can set up security for skill sources. In addition to the skill sources domains, users must have access to the corresponding domains of each skill source. Users can click a skill to access either the Edit Skill Sources task or View Skill Detail report, depending on their security access.

Workday automatically selects a skill source for a skill if a worker adds a suggested skill that Workday based on a skill source.

Related Information

Reference

Reference: Skill Sources on page 1869

Concept: Skills Cloud Translations

Workday supports Skills Cloud in these languages to support your global workforce:

- Chinese (Simplified)
- Chinese (Traditional)
- Danish
- Dutch
- English
- Finnish
- French (Canada)
- French (France)
- German
- Italian
- Japanese
- Korean
- Portuguese (Brazil)
- Norwegian
- Spanish (Neutral)
- Swedish

You can enable these languages in the Edit Tenant Setup - Global task. When a user sets their preferred language to one of these languages, they can search for and select Skill Cloud skills in that language.

Workday automatically translates Skills Cloud skills to improve the visibility of skills across your tenant. If translations are available for a Skills Cloud skill, Workday displays that skill in a user's preferred language. Example: Dennis, whose preferred language is German, uses the Edit Skills task to search for skills in German and adds them to his profile. Betty, whose preferred language is French (France), visits Dennis' profile and sees his skills in French.

Workday displays Skills Cloud skills in English when:

- A translation isn't available for another language.
- A user's preferred language isn’t supported for Skills Cloud.

Workday supports Skills Cloud translations in:

- Recruiting
- Learning
- Projects
- Talent
- Talent Marketplace

Related Information
Tasks
Steps: Set Up Skills Cloud on page 1852

Concept: Automated Skill Management

Overview

Workday Skills Cloud performs regular automated background processes to clean up and maintain skills in your tenant. These background processes perform:

- Duplicate Skill Management
- Synonym Skill Management
- Deprecated Skill Management

These background processes reduce the number of skills in your tenant that are synonyms or duplicates of Skills Cloud skills, and increase the usability of skill data in your tenant. Once you enable Skills Cloud in your tenant, you can't opt out of these background processes.

The background processes evaluate 1,000 skills in each hourly batch, so tenants with large numbers of skills or new skill translations will require additional time to complete the duplicate and synonymous skill conversions. Workday recommends waiting a minimum of 1 week after first enabling Skills Cloud before reviewing your remaining tenanted skills.

Duplicate Skill Management

Duplicate Skill Management reduces the number of crowdsourced and maintained skills in your tenant. Workday performs a series of background jobs that regularly evaluates all skills in your tenant for any that are exact matches to a Skills Cloud skill. If a match is found, Workday automatically:

1. Creates the canonical Skills Cloud skill in your tenant if it doesn’t already exist.
2. Migrates usages of the duplicate tenanted skill to the matching Skills Cloud skill.
3. Migrates comments on the duplicate tenanted skill to the matching Skills Cloud skill.
4. Keeps the highest entered skill level for the Skills Cloud skill.
5. Deletes the duplicate tenanted skill.

The Duplicate Skill Management background process runs every hour and identifies skills as duplicates if they're an exact textual match to a Skills Cloud skill. Workday replaces duplicate skills with the Skills Cloud skill of the same name and removes them from the Maintain Skills and Find Skill reports. If there's a merged skill on a duplicate skill, Workday removes the merged skill from the Maintain Skills report.

Workday converts translations of duplicate skills in languages supported by Skills Cloud into Skills Cloud skills. Workday doesn't convert tenanted translations of duplicate skills in languages not supported by Skills Cloud, but we continue to display the translated skill to users.

Example: When an English maintained skill that has a Spanish tenanted translation converts to a Skills Cloud skill, Workday removes this skill from the Maintain Skills report. However, users with Spanish as their preferred language continue to see that skill in Spanish, as previously configured.

This background process affects skills used on all skill-enabled Workday objects.

Synonymous Skill Management

Synonym Skill Management enables a series of background jobs that regularly evaluate all skills in your tenant for any that are a synonym of a Skills Cloud skill. If a match is found, Workday automatically:

1. Creates the canonical Skills Cloud skill in your tenant if it doesn't already exist.
2. Migrates usages of the synonymous tenanted skill to the matching Skills Cloud skill.
3. Migrates comments on the synonymous tenanted skill to the matching Skills Cloud skill.
4. Keeps the highest entered skill level for the Skills Cloud skill.
5. Deletes the tenanted skill.

The Synonym Skill Management background process runs every hour and identifies skills in your tenant that are synonymous with a Skills Cloud skill. Workday removes these skills from your tenant and replaces them with the synonymous Skills Cloud skill. This conversion affects all crowdsourced, maintained, and Skills Cloud skills in your tenant except for those skills used by candidates.

This background process affects skills used on all skill-enabled Workday objects.

You can exclude individual skills from being converted by editing the skill on the Maintain Skills report and selecting the Exclude from Synonym Management check box. When first enabling Skills Cloud, Workday will automatically exclude all maintained skills from synonym management by default. Workday recommends using the Put Skills web service to change this option for maintained skills in bulk.

Deprecated Skill Management

Skills Cloud skills can be marked as Deprecated and removed from the Skills Cloud. Workday deprecates skills when they no longer meet Workday's definition of a skill, including checks for labor market relevance, ambiguity, and relevance for professional development. When Skills Cloud deprecates a Skills Cloud skill in use in a customer tenant, Workday:

1. Creates an inactive maintained skill with the same name as the deprecated skill.
2. Moves over the usages from the deprecated skill to the newly created inactive maintained skill.
3. Keeps the highest entered skill level for the Skills Cloud skill.
4. Removes the deprecated skill from the customer's tenant.

Workday creates inactive maintained skills to ensure that any customer usages against the deprecated skill are preserved. Workday won't delete customer usages of a skill on their behalf.

This background process replaces the deprecated skills in your tenant with inactive maintained skills. Workday automatically enables this background process when you enable the duplicate skills conversion background process.

Additional Information

A usage is a connection between a skill and another object in Workday. Examples of usages include:

- Skills in skill categories
- Skills on workers
- Skills on candidates
- Skills on job profiles

Workday automatically migrates all usages on behalf of customers.

Additional notes to consider:

- You can't exclude crowdsourced skills. Workday automatically replaces crowdsourced skills if they're a duplicate or a synonym of a Skills Cloud skill,
- Workday doesn't change the skills on the candidate person type. When Workday finds a skill on a candidate that's a synonym of a Skills Cloud skill, Workday will create a crowdsourced skill to represent the candidate skill item. Workday migrates and replaces all other usages of the synonymous skill on every other object.
- When you mark a maintained skill as a duplicate of another maintained skill, Workday automatically deletes the duplicate skill and merges all of its usages.

Related Information

Reference

The Next Level: Power of Skills

Reference: Skill Sources

Skill sources in the Edit Skill Sources task and View Skill Detail report are only visible to users with access to the corresponding domains. You access the Edit Skill Sources task or View Skill Detail report by clicking on a skill. If you enable skill level, workers access the task or report from the skill-level modal.

Skill Source	Domains	Notes
Anytime Feedback	In the Performance Enablement functional area: • *Self-Service: Anytime Feedback* • *Worker Data: Anytime Feedback*	Workday suggests skills based on public anytime feedback text.
Certifications	In the Worker Profile and Skills functional area: • *Person Data: Certifications*	Workday doesn't suggest skills based on certifications, but workers can add skills based on their certifications.

Skill Source	Domains	Notes
	• *Self-Service: Certifications*	
External Skill Sources	In the Worker Profile and Skills functional area: • *Self-Service: External Skill Source* • *Worker Data: External Skill Source*	Workday doesn't suggest skills based on external skill sources but workers can add their own external skill source information.
Flex Teams	*Flex Teams* in the Talent Marketplace functional area	Flex Teams are only available as a skill source when a flex team host endorses the worker for a skill.
Job History	In the Worker Profile and Skills functional area: • *Person Data: Job History* • *Self-Service: Job History*	Workday suggests skills based on job titles and descriptions.
Learning Courses	In the Learning Core functional area: • *Person Data: Learning* • *Self-Service: Learning*	Workday suggests skills based on the tagged skills or recommended skills of a completed learning course.
Position History	*Worker Data: Historical Staffing Information* in the Staffing functional area	Workday suggests skills based on your current position title and description when you opt into Position History for Skill Suggestions and Verification on the Maintain Feature Opt-Ins report. When the job description and job description summary are blank on the position, Workday suggests skills based on the corresponding job profile. Don't use Position History as a skill source if you're using the *Manage Job History* subprocess for any of these business processes: • *Add Additional Job* • *Change Job* • *Hire* • *Title Change*
Projects	*Worker Data: Project* in the Projects functional area	Workday suggests skills based on completed project information, such as the: • Project name and description. • Worker's project role name, description, and skill requirements.

Skill Source	Domains	Notes
Skill Assessments	In the Worker Profile and Skills functional area: • *Person Data: Skill Assessment Data* • *Self-Service: Skill Assessment Data*	Workday adds skill assessments as a skill source once an assessor completes a skills assessment for a worker using the *Assess Skills* business process.
Skill Endorsements	In the Worker Profile and Skills functional area: • *Self-Service: Skill Endorsements* • *Worker Data: Skill Endorsements*	Workday adds endorsements as a skill source once a feedback provider endorses a worker for a skill. You can't make changes to skill endorsements from the Edit Skill Sources task.
Skill Ratings	In the Worker Profile and Skills functional area: • *Self-Service: Skill Ratings* • *Worker Data: Skill Ratings*	Workday adds ratings as a skill source once a feedback provider rates a worker's skill. You can't make changes to skill ratings from the Edit Skill Sources task.

Related Information

Tasks

Steps: Set Up Skills Cloud on page 1852

Edit Domain Security Policies

Learning

Learning Setup and Maintenance

Setup Considerations: Learning

You can use this topic to help make decisions when planning your configuration and use of Learning. 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 Learning combines development, peer learning, and required training into a single platform. It enables you to manage:

- Delivery of learning content for specific users or the entire workforce.

- Storage of learning materials.
- Worker and external users engagement and progress.

Business Benefits

Workday Learning:

- Helps ensure users only access appropriate content.
- Makes it easy to find and use material by providing an intuitive and configurable interface.
- Streamlines your employees' career development by enabling them to check available learning opportunities when setting goals, or recommend courses when they change positions.
- Helps you keep your learning catalog up to date by enabling subject matter experts to create their own content.
- Uses machine learning to suggest content that can help develop or improve existing skills.
- Maintain standards by adding steps to your business process requiring approval before you make content available.
- Maximize efficiency as you mass drop learners from a course offering or digital course.

Use Cases

- Organize your learning into categories relevant to specific skills to find content more easily.
- Enable learners to set personal preferences, such as improving specific skills. Workday Learning suggests courses that are relevant to their interests.
- Curate content for specific skills or expertise.
- Define an approval process for new content.
- Enroll team members or entire teams in programs or courses.
- Require learners to take lessons or courses.
- Create courses that instructors deliver in person, have digital content, or a combination of both.
- Inform potential learners when courses are available and configure reminders when they enroll.
- Report on the usage, progress, or pass rate of your learning content.
- Capture a learner's progress by entering scores, grades, or feedback with a training activity.
- Enable your learners to provide feedback through questionnaires or ratings.

Questions to Consider

Question	Consideration
How do you want to organize your learning catalog?	Categorize courses, lessons, and programs into topics that your learners can browse. Administrators can tag specific skills to learning content. The content can display on worklets as recommendations to learners for skills they want to improve, or develop. Workday delivers standard topic icons that you can use to help workers find relevant content. You can also collate content using: • Campaigns to highlight learning content. You can then send your campaigns to a specific audience, and configure notifications to remind them of due dates. Example: A manager creates a campaign to ensure that his team members complete a course on a new release process.

Question	Consideration
	• Learning paths to enable learners to create their own personalized curriculum from the learning catalog. • Learning programs to define a group of courses and lessons, and create 1 assignment for a group of workers. Example: You can create an Onboarding program for new hires.
Where do you train your learners?	You can create courses that are: • Instructor-led. These courses are held in person in a specific location. • Digital or online. Example: Create a digital course when you have learners in many time zones. • Blended. These courses have a combination of instructor-led, digital, webinar, and training segments.
How do you want to enroll learners?	Along with enrolling individual workers, managers can mass enroll learners by: • Role. Example: Enroll managers in a course on conducting employee reviews. • Team. Example: Enroll your Absence team in a learning course about configuring time off plans. Learners can also enroll themselves in available courses or programs. If you make an error when enrolling workers, you can also mass drop learners from a course offering or digital course.
How do you want to publicize available learning opportunities?	You can use worklets to: • Inform workers of required courses or lessons. Example: Compliance with a company policy. • Recommend learning content that is relevant to your workers' skills development, career path, or interests. You can also create campaigns, which are a combination of lessons, programs, and courses that you can send to a group of users. You can configure notifications to announce the campaign, its purpose, and send them as emails to prospective learners.
What existing content do you want to import from external systems?	Cloud Connect for Learning and Public Learning Content enable you to import third-party media content. Workers can also access external content by search, or linked as a recommended course. You can load media into Workday using:

Question	Consideration
	• The Workday Learning interface to documents or graphics to an existing course or lesson. • Media importer or web services to bulk load external learning content. Configure Workday to import Skillsoft content and: • Automatically add new content. • Activate or deactivate content. • Update existing course materials.
Who can access or create your training materials?	You can use segmented security to provide access to, and ability to edit, learning content for different types of workers. Examples: • All employees. • Contingent workers. • External learners. • Managers. • Pre-hires. You can also: • Restrict course content based on different criteria. Example: Restrict access based on a worker's location, role, organization, or job. • Suggest equivalent courses for workers if they don't have access to one they're interested in. Example: A user experience developer wants to access a software testing course. You can create an equivalency to display a quality assurance fundamentals course as an alternative. • Create prerequisites, requiring learners to complete a content item before they start. Example: A confidentiality agreement. • Structure your content sequentially when you want your learners to complete courses in a certain order. Configure business processes to add approval steps when workers: • Create learning content. • Edit learning content. • Manage learning content versions.
Who are your instructors?	You can have your course or lessons given by: • Internal instructors. • External instructors. • Subject matter experts who you can assign as instructors for specific lessons. External instructors can't: Enroll in content, unless they are also extended enterprise learners.

Question	Consideration
	• View worker profiles or details about a worker that aren't relevant to the courses that they teach.
Do you charge for your courses?	Workday enables you to configure pricing and price display options for learning courses and course offerings. You can configure prices in different currencies and use condition rules to set prices for groups of learners and extended enterprise learners. You can also configure e-commerce capabilities to allow learners to purchase courses through a third-party payment processor. You can track and measure the value of interdepartmental training programs as well.
When do you schedule your learning opportunities? How do you assess your learners?	You can assign roles to plan schedules and assess learners: • Learning assessors manage schedules along with the grading and attendance roster from their dashboards. They can also enter grading and attendance results for learners enrolled in a course offering. You can also create external learning assessors from existing external learning users. • Instructors can enter results for learners who attend their lessons. • Primary instructors and learning administrators can override each result.
How often do you update your courses and lessons?	Whenever you update an existing lesson, or add content to a course, you can set a date for the update to become effective. Example: Create a lesson describing a new feature and create an effective date for the release date. You can also create versions for blended courses. Example: You can send legacy blended courses to learners who are working on an earlier version of your software.

Recommendations

- Consider performance impacts when adding learners or courses or creating campaigns. Workday restricts you to fewer than 50,000 learners on any learning campaign. We recommend that you have fewer than 250,000 courses in your learning catalog. This number doesn't include imported records or content.
- To help increase efficiency, we recommend that you plan to create your learning campaigns at an early stage in your implementation.

Requirements

Create topics before you create courses or lessons to improve the catalog search and browsing experience. Learners search by topic for learning materials. Example: Create a topic named HR before creating the relevant learning content.

Limitations

- You can't delete topics, you can only inactivate topics. Workers can't search for topics you inactivate.
- You can only apply version control for blended courses.
- You can only add 1 standard icon per topic.
- You can't purge learning content from your tenants.

Tenant Setup

Use the Edit Tenant Setup - HCM task to configure tenant-wide options for:

- Course and lesson rating.
- Learning paths.
- Language preferences for learning recommendations.
- Packaged content. Example: SCORM digital courses.
- Enabling pricing configuration on content for specific workers.
- Segmented security.
- Declarations of interest in a course or lesson.
- Virtual classroom integration.

You can use the Edit Tenant Setup - System task to configure tenant-wide options for:

- Acceptable media use policy text.
- Comments on courses or lessons.
- Default video playback quality.
- Download and upload of content to Drive.
- Video captioning.

You can use the Edit Tenant Setup - Notifications task to configure tenant-wide notifications for:

- Campaigns.
- Changes to Drive. Examples: Adding or removing content and changing access.
- Expirations.
- Reminders.
- Surveys.

Security

You can use:

- Workday-delivered security groups to provide users access only to specific learning content.
- A user-based security group to provide learning administrators with access to all learning content.
- A segment-based security group to provide access to learning content for different types of workers.

To view the different security domains for Learning, access the Domain Security Policies for Functional Area report and select a Learning functional area.

Functional Area	Considerations
Learning Core	Security domains in this functional area enable users to configure and use core learning features. They can view the contents of your learning catalog and create or edit: • Assignments. • Campaigns. • Content. • Grades for learners. • E-Commerce.

Functional Area	Considerations
	• Enrollments. • Instructors and assessors. • Integrations with third-party software. • Pricing. • Reports. • Waitlists.
Backpack Hub Service	Security domains in this functional area enable users to configure and use basic media content features in Learning, including: • Accessing media tracking data. • Configuring content synchronization. • Creating, editing, and viewing. • Expiring out-of-date packaged content.
System	Security domains in this functional area enable users to configure and use Workday features with learning, such as: • Downloading iCal files for Microsoft Outlook calendars. • Drive. • Segmented security. • Surveys. • Questionnaires.
Worker Profile and Skills	Users with access to the *Set Up: Skills and Experience* domain can access details such as: • Certifications. • Education. • Skills tagging for relevant content. • Training. • Work experience.

Business Processes

Business Process	Description
Cancel Course Offering	Create condition rules and custom notifications.
Enroll in Content	You can create condition rules and custom notifications using report fields for learning content on the Learning Enrollment Event business object. Example: Learners can drop on-demand courses without manager approval, but not if they're required learning (either campaigned or manager-enrolled courses).
Waitlist in Course	If a course is full, the *Waitlist in Course* initiating action enables learners to join a waitlist until a seat is available. When a course begins, Workday automatically drops learners from the waitlist.
Manage Course	You can add approval steps when workers:

Business Process	Description
Manage Lesson *Manage Program*	• Create learning content. • Edit learning content. • Manage learning content versions.
Manage Course Offering	You can configure the business process security policy to enable learning administrators or instructors to move instructor-led classroom training online in course offerings.
Mass Enroll	You can configure this business process to enable managers to enroll their teams in a course. Users with access to the Find Workers to Enroll report can enroll specific workers.
Manage External Learning Assessor	You can use this business process to create new external learning assessors from existing external learning user accounts.
Manage Internal Learning Assessor	You can use this business process to create new internal learning assessors from an existing worker or contingent worker.

Reporting

To view the available reports for Workday Learning, access the Workday Standard Reports report.

Report or Dashboard	Description
Courses and Lessons Created (Last 12 Months)	Use this report to monitor the rate at which users create learning content. Example: Use this information to plan for which department requires more courses.
Learning Admin	Use this dashboard to provide an administrative view of learning content with access to: • Tasks and reports that enable you to maintain the learning catalog. • Learning content reports and employee self-service tasks for learners. • Reports that provide insight into the value and effectiveness of training.
Learning by Length of Service	Use this report to analyze learning engagement across the organization by worker length of service. Example: Identify whether there are sections of the worker population who aren't engaging with learning.
Learning Content by Rating	Use this report to identify: • How learning courses and stand-alone lessons are performing. • The highest performing content.
Learner Engagement	Use this report to evaluate learner engagement in terms of enrollments and completions, so you can examine why some learners engage more than others.

Report or Dashboard	Description
	The report only displays data for the last complete month.
Learning Trainer	Use this dashboard to enable trainers to: • View your schedule and the course offerings that they're teaching. • Manage your training activities. • Find workers to enroll in content. • Manage waitlists. • Manage grading and attendance.
My Express Interest on Courses	Use this report to identify expressions of interest. Example: Use this information to build a learning campaign when workers in your team express interest in the same courses.
My Library	Use this dashboard to enable learners to create, access, and manage their learning paths.
My Team's Learning	Use this report to display a summary of learning progress for all direct reports and pre-hires, including: • Attendance status. • Completion status. • Enrolled content.

Integrations

Workday provides multiple web services and integrations for common learning inputs and configurations. Consider these fundamental web services and integrations when configuring Workday Learning.

Web Service	Consideration
Manage External Learning Instructors *Manage Internal Learning Instructors*	Use these web services to create internal instructors from workers inside your tenant or external instructors.
Manage Course Offering *Manage Learning Course* *Manage Learning Program* *Manage Lesson*	Use these web services to convert learning content, or how you offer available courses to potential learners. Use the Legacy check box on the *Manage Learning Course* web service to enable a course to display as a legacy course on reports and identify when it uploads as a legacy course. This check box is noneffective dated. If you uncheck it in the future, all versions of the course will be unchecked.
Manage External Learning Assessor *Manage Internal Learning Assessor*	Use these web services to create or update external or internal learning assessors.
Put Learning Imported Content *Put Learning Imported Record*	Use these web services to bulk load existing content or enrollments into Workday.
Put Learning Topic	Use to create learning topics.

Web Service	Consideration
Put Media Settings	Use to update the Restrict Access check box setting for a specific media item.

Workday also supports integrations with third-party media content providers, including:

- Coursera
- Go1
- Harvard ManageMentor®
- LinkedIn Learning™
- OpenSesame
- Pluralsight
- Skillsoft Percipio
- Udemy Business
- YouTube

Connections and Touchpoints

Touchpoint	Consideration
Absence	When an employee attempts to enroll in a scheduled course, Workday checks their approved absences. When there's a conflict, Workday displays a warning message so the worker can adjust their absence or enrollment.
Opportunity Graph	Workday Learning helps learners identify courses ranked most highly by those workers in positions on their Opportunity Graph.
Talent	You can: • Use the survey functionality from Talent as a lesson type within a course. Surveys enable you to get feedback on the course, that you can use to improve your learning content. • Use Talent Marketplace and Career Hub to suggest learning content to help close skills gaps. • Use Manager Insights Hub to suggest learning content that managers can share with their direct reports. • View the learning content that you completed to achieve a competency, and suggestions for other content.

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: Learning Topics on page 1901

Concept: Translations

Setup Considerations: Campaigns

Tasks

Reference

The Next Level: Prepare for a Workday Learning Deployment
2024R1 What's New Post: External Learning Assessors

Setup Considerations: Learning Instructors

You can use this topic to help make decisions when planning your configuration and use of learning instructor 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 learning instructor functionality enables you to select and configure settings for instructors who:

- Manage waitlists.
- Give lessons.
- Grade learners' course work.

Business Benefits

- Intuitive interface that makes it easy for instructors to manage their schedule and classes.
- Configure dashboards and notifications to keep instructors informed about their upcoming classes.
- Reduce administrator maintenance by enabling instructors to manage the enrollment waiting list and by bulk uploading existing instructors into Workday.
- Maintain security over your learning catalog and worker information.
- Enable instructors to create lessons and schedule course offerings.
- Maintain standards by including approval steps before you publish lesson content.
- Improve your learner experience by assigning external users or SMEs as instructors.

Use Cases

- Enable instructors to enter grades, scores, and attendance for learners on their course.
- Assign instructors to individual courses or lessons.
- Generate PDFs of each course roster.
- Configure alerts to notify instructors when you assign them to a course offering.
- Upload existing instructors into Workday.

Questions to Consider

Question	Consideration
Who are your instructors?	You can have your courses or lessons given by: • Internal instructors. • External instructors. Example: Subject matter experts who you can assign as instructors for specific lessons. External instructors can't: • Enroll in courses, unless they're also extended enterprise learners. • View worker profiles or details about a worker that aren't relevant to the courses they teach.
How do you want to inform instructors of classes?	You can let instructors know about upcoming classes by configuring: • Your instructors' learning dashboard to display upcoming classes on their calendar. Instructors can export details to add to third-party calendars. • Notifications for new course offerings that you assign to them. • Schedules to send reminders to your instructors. Example: Set up reminders to notify instructors who haven't taken attendance on courses.
How do you assess your learners?	You can assign an instructor to grade work, and record attendance in individual lessons. You can also assign primary instructors when scheduling a course offering. These instructors mark the overall grade and attendance in the course. Primary instructors can review passing grades and override the results if necessary.
How do you manage your training materials?	You can enable instructors to create and edit learning content. Instructors can also verify their content by viewing it as a learner. You can also restrict access to course content based on different criteria. Example: Restrict access based on an instructor's location. You can configure business processes to add approval steps when instructors: • Create learning content. • Edit learning content. • Manage learning content versions.

Recommendations

No impact.

Requirements

Create external learning user accounts for external learning instructors.

Limitations

Learners don't receive automatic notifications when you convert an instructor-led classroom training lesson to a webinar.

You can't assign instructors by role-based groups.

You must display instructor names to learners on course offerings.

Tenant Setup

No impact.

Security

You can use:

- Workday-delivered security groups to provide instructors access only to specific learning content.
- A segment-based security group to provide access to learning content for instructors.

Domains	Considerations
Self Service: Learning Instructor	Users with access to this domain can use roster management tasks and reports such as: • Instructor schedules. • Grading and attendance for course offerings. • Waitlists.
Manage: Create and Edit Learning Roles	Users with access to this domain can access administrative tasks and reports to manage learning instructors.

Business Processes

Business Process	Description
Manage Course Offering	You can configure the business process security policy to enable learning administrators or instructors to move instructor-led classroom training online in course offerings.
Manage External Learning Instructor *Manage Internal Learning Instructor*	You can configure these business processes to designate external third-party users as external instructors and workers as internal instructors.

Reporting

Use the Learning Trainer dashboard to enable instructors to:

- View your schedule and the course offerings that they're teaching.
- Manage your training activities.
- Find workers to enroll in courses.
- Manage waitlists.
- Manage grading and attendance.

You can use the Learning Instructors report data source when creating custom reports on learning instructors.

Integrations

Web Service	Consideration
Manage External Learning Instructors *Manage Internal Learning Instructors*	Use these web services to designate workers inside and outside of your tenant as instructors.
Get External Learning Instructors *Get Internal Learning Instructors*	Use these web services to view instructors in your tenant.
Manage Learning Instructor From Worker	Use this web service to add or inactivate instructors.

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.

Related Information

Concepts

Setup Considerations: Segmented Security for Learning on page 1905
Setup Considerations: Learning Content on page 1947
Setup Considerations: Learning Lessons on page 1956

Tasks

Steps: Set Up Learning Instructors on page 1888
Move Instructor-Led Classroom Training Online on page 2000
Manage Schedules and Grading and Attendance on page 2087
Manage Waitlists for Learning Course Offerings on page 2086

Reference

2021R2 What's New Post: Manage Internal Learning Instructors

Steps: Set Up Learning

Prerequisites

Review setup considerations for Workday Learning.

See: Setup Considerations: Learning Content on page 1947.

Context

You can set up Workday Learning to enable:

- Learning administrators to create and manage learning content and enrollments.

  See: Steps: Manage Learning Content on page 1969.
- Learners to consume content and create stand-alone lessons for peer learning.

  See: Setup Considerations: Learning Lessons on page 1956.

Steps

1. Configure security for Learning.

   See Steps: Set Up Security for Learning on page 1913.

2. Access the Manage Topics task.

   Create topics that categorize your learning content.

   Security: *Set Up: Learning Catalog* domain in the Learning Core functional area.
3. (Optional) Translate Business Data.

   Configure translations for field values on the *Learning Topic* business object in the *Learning: Learning Core* category to support global learning.
4. (Optional) Maintain Drop Course Event Categories on page 1900.

   You can create categories for drop reasons and subcategories when dropping learning enrollments.
5. (Optional) Steps: Configure Microsoft Outlook Calendar for Learning on page 1966.

   You can create and send calendar invites when you schedule classroom training and webinars in course offerings.
6. (Optional) Steps: Configure Google Calendar for Learning on page 1964.

   You can create and send calendar invites when you schedule classroom training and webinars in course offerings.
7. (Optional) Create and send Zoom meeting invites when you schedule classroom training and webinars in course offerings.

   Steps: Set Up Virtual Classroom Integration with Zoom on page 1980.
8. (Optional) Steps: Configure Translation Templates for Calendar Email Invites on page 1968.

   Create and send email translation templates in the specified language of a course offering.
9. (Optional) Maintain Learning Unit Types on page 1900.

   You can create other unit types for learning courses and course offerings.
10. (Optional) Enable learners to express interest in specific course offerings.

    See Steps: Set Up Express Interest for Learning Courses on page 1893.
11. (Optional) Maintain Learning Validations for Learning Enrollments on page 1898.

    You can create and maintain custom validation messages for learning enrollments.
12. (Optional) Configure segmented security to restrict access to learning content.

    See Steps: Maintain Access to Learning Content on page 1914.
13. Configure the Learning report on the Career for Worker Profile profile group to enable:

    - Learners to access their learning history through self-service.
    - Managers to access the learning history of their direct reports.

    See Steps: Set Up Profiles and Profile Groups.
14. Access the Copy Standard Report to Custom Report task.

    Copy the Find Workers report to create a custom report.

    On the Advanced tab, add a Mass Actions row and select *Learning Mass Enroll* from the Workday Supplied Mass Actions prompt, enabling you to mass-enroll learners. The search report must use a data source with *Worker* as the primary business object.

    Security: *Set Up: Learning Catalog* domain in the Learning Core functional area.
15. Configure Learning Dashboards on page 1897.

    Configure these dashboards to set up content containers as worklets and display relevant reports:

    - Learning
    - Learning Admin
    - Learning Trainer
    - My Library

    The user interface on the Learning Admin dashboard enables learning administrators and trainers to run administrative tasks. Select the View as Admin button on learning content reports to view the content as an administrator and to enable Workday to remember this setting preference. If you want to view content as a learner, select the View as Learner button on learning reports or access the content through the Learning dashboard.

16. Create learning instructors.

    See Steps: Set Up Learning Instructors on page 1888.

17. (Optional) Add approval steps that enable administrators or managers to review new:

    - Courses
    - Programs
    - Stand-alone lessons
    - Enrollments
    - Equivalency rules

Business Process	Option
Manage Course	Configure the *Reset Expiration Date on Enrollments for Course* action step as a completion step after any approval steps on this business process. This configuration initiates the Reset Expiration Date on Enrollments task when you update a course that has completed enrollments. You can configure condition rules on this step when you want it to apply to specific events on the business process. Configure the *Edit Additional Data* action step if you want to set a value for custom fields on learning courses.
Manage Course Offering	Configure the *Reset Expiration Date on Enrollments for Course Offering* action step as a completion step after any approval steps on this business process. This configuration initiates the Reset Expiration Date on Enrollments task when you update a course offering that has completed enrollments. Configure condition rules on this step to apply to specific events on the business process. Example: You can create a condition rule using the *Initiated by Update Offering to Version* report field that applies when the Update Offering to Version task initiates this business process. Configure the *Edit Additional Data* action step if you want to set a value for custom fields on learning course offerings. You can rescind an event for this business process once there are no outstanding: • Enrollments in the course offering. • Events for the course offering in progress. • Mass enrollment events in progress for the course offering. • Newer events you must rescind.

Business Process	Option
Manage Program	Configure the *Edit Additional Data* action step on this business process to set a value for custom fields on learning programs.

See Edit Business Processes.

18.(Optional) Create Locations.

Create training rooms for learning instructor-led classroom training lessons.

19.(Optional) Steps: Set Up Learning Assessors.

Assign workers or external learning users as learning assessors for course offerings with training activity lessons.

20.(Optional) Access the Edit Tenant Setup - Global task.

Enable supported language options for learning content search results.

Security: *Set Up: Tenant Setup - Global* domain in the System functional area.

21.(Optional) Configure translations in your tenant.

See Steps: Manage Translations.

22.(Optional) Configure e-commerce capabilities.

See Steps: Set Up E-Commerce for Learning on page 1932.

23.Create content for the learning catalog.

See Steps: Manage Learning Content on page 1969.

24.Enable activity streams on these objects so that learners can collaborate using comments after they enroll in or complete courses or stand-alone lessons:

- *Enrollable Learning*
- *External Lesson*
- *Learning Lesson*

See Steps: Enable Activity Stream.

25.(Optional) Set up email analytics for Learning to view how learners interact with emails you send from Workday.

See Steps: Set Up Email Analytics.

26.Manage tenant-wide settings for learning.

See Reference: Edit Tenant Setup - HCM.

27.Access the Edit Tenant Setup - System task.

In the System Setup section, for the File Type Setup Instructions option, ensure that you include *.ics* to enable learners to download the iCalendar (.ics) file type.

Next Steps

Import third-party material to add to your learning courses.

See: Setup Considerations: Packaged Content for Learning on page 2064.

Related Information

Tasks

Steps: Manage Translations

Reference

Reference: Edit Tenant Setup - System

The Next Level: Prepare for a Workday Learning Deployment

2024R1 What's New Post: External Learning Assessors

Steps: Set Up Learning Instructors

Context

You can designate existing:

- External learning users as external learning instructors.
- Workers as internal learning instructors.

Workday automatically assigns them to appropriate security groups.

External learning instructors can't:

- Enroll in courses, unless they're also extended enterprise learners.
- View worker profiles or details about a worker that aren't relevant to the courses that they teach.

Steps

1. Edit Business Processes.

   Configure 1 or both of these business processes in the Learning Core functional area:

   - *Manage External Learning Instructor*
   - *Manage Internal Learning Instructor*
2. Edit Business Process Security Policies.
3. Edit Domain Security Policies.

   Configure the security policy for these domains:

   - *Self Service: Learning Instructor* in the Learning Core functional area.
   - (Optional) *Self-Service: Certifications* in the Worker Profile and Skills functional area.
4. Configure Dashboard Content.

   Configure these worklets for 1 or both of the External Learning Instructor as Self and Internal Learning Instructor as Self security groups:

   - My Course Offerings on the Learning Trainer dashboard.
   - Learning Trainer on the Home dashboard.
5. (Optional) To create external learning instructors:
   a) Create External Learning Users on page 2127
   b) Access the Create External Learning Instructor task.

      Activate the external learning instructor persona on external learning user accounts.

      Security: *Manage External Learning Instructor* business process in the Learning Core functional area.
6. (Optional) To create internal learning instructors, access the Create Internal Learning Instructor task.

   Security: *Manage Internal Learning Instructor* business process in the Learning Core functional area.

Result

Workday assigns new external learning instructors to these security groups:

- All External Learning Instructors.
- External Learning Instructor as Self.

Workday assigns new internal learning instructors to these security groups:

- All Internal Learning Instructors.
- Internal Learning Instructor as Self.

Next Steps

Assign instructors to courses.

Related Information

Tasks

Steps: Manage Internal Learning Instructors and Assessors in Bulk on page 1891

Steps: Manage External Learning Instructors and Assessors in Bulk on page 1890

Reference

Reference: Security Domains for Learning on page 1922

Reference: Learning Business Processes on page 1918

2021R2 What’s New Post: Manage Internal Learning Instructors

2021R2 What’s New Post: Unified System Account for External Learning Personas

Steps: Set Up Learning Assessors

Context

Learning assessors evaluate and manage training activity lesson content on course offerings, including grading work and recording attendance. You can designate existing:

- Workers as internal learning assessors.
- External learning users as external learning assessors.

Workday allows you to add multiple assessors for each enrollment on course offerings with training activity lessons.

Workday automatically assigns internal and external learning assessors to appropriate security groups.

Steps

1. ../../../manage-workday/business-processes/customize-business-processes/dan1370797384762.dita.

   Configure either or both of these business processes:

   - *Manage Internal Learning Assessor* business process in the Learning Core functional area.
   - *Manage External Learning Assessor* business process in the Extended Enterprise for Learning and Learning Core functional areas.
2. Edit Business Process Security Policies.

   Configure the security policy for either or both of these business processes: *Manage Internal Learning Assessor*, *Manage External Learning Assessor*.

   - You can configure the Create Internal Learning Assessor and Edit Internal Learning Assessor tasks as initiating actions on the *Manage Internal Learning Assessor* business process. You can designate a worker as an internal learning assessor only when the worker isn't already an internal learning assessor, and there aren't any *in progress* internal learning assessor events for the worker.
   - You can also configure the Create External Learning Assessor task as an allowed action on the *Manage External Learning User* business process. You can designate an external learning user as an external learning assessor only when the user isn't already an external learning assessor, and there aren't any *in progress* external learning assessor events for the user.

3. Edit Domain Security Policies.

   Configure the security policy for these domains:

   - *Self-Service: Learning Assessor* in the Extended Enterprise for Learning and Learning Core functional areas. Grant the External Learning Assessor as Self security group View permissions to enable them to view their Extended Enterprise profile.
   - *Self-Service: On the Job Training* in the Learning Core functional area. Grant the External Learning Assessor as Self security group Modify permissions to enable them to access the Learning Trainer worklet and manage grading and attendance for course offerings.
4. Configure Dashboard Content.

   Configure these worklets for the Learning Assessor as Self and the External Learning Assessor as Self security groups:

   - My Course Offerings on the Learning Trainer dashboard.
   - Learning Trainer on the Home dashboard.
5. (Optional) Access the Create Internal Learning Assessor task.

   Create internal learning assessors.
6. (Optional) Access the Create External Learning Assessor task.

   Create external learning assessors.

Result

Workday adds new internal learning assessors to these security groups:

- All Learning Assessors.
- Learning Assessor as Self.

Workday adds new external learning assessors to these security groups:

- All External Learning Assessors.
- External Learning Assessor as Self.

Related Information

Tasks

Steps: Manage Internal Learning Instructors and Assessors in Bulk on page 1891

Steps: Manage External Learning Instructors and Assessors in Bulk on page 1890

Reference

2024R1 What's New Post: External Learning Assessors

Steps: Manage External Learning Instructors and Assessors in Bulk

Prerequisites

Security: *Mass Operation Management* domain in the System functional area.

Context

You can use a mass operation to activate or inactivate up to 50,000 external learning instructors and assessors at once based on criteria specified in a custom report.

Workday excludes external learning users who are archived, have in-progress *Manage External Learning Assessor* or *Manage External Learning Instructor* events, or already have an active external learning assessor or external learning instructor role. It also doesn't update external learning users who don't have an active assessor or instructor role when the role is revoked.

Steps

1. ../../../manage-workday/business-processes/manage-business-processes/ske1468876236571.dita

   You can create a new security group or edit an existing one and enable members to manage external learning instructors and assessors.

   Select the *External Learning Instructors and Assessors Account Management* security segment
2. ../../../authentication-and-security/configurable-security/security-policies/dan1370797389950.dita

   Grant the new segment-based security group Modify permissions on the *Mass Operation Management* domain.
3. ../../../authentication-and-security/configurable-security/security-change-control/dan1370796405018.dita
4. ../../../reporting-and-analytics/custom-reports-and-analytics/set-up-reports/dan1370797785951.dita

   Create a custom report based on the External Learning Users report data source that defines the criteria for the users you want to activate or deactivate.
5. Access the Mass Operation Management task.

   Complete these options:

Option	Description
Mass Operation Type	Select the Manage External Learning Instructors and Assessors operation type. Workday only displays this option when the user is a member of the segmented security group with access to the *External Learning Instructors and Assessors Account Management* segment.
Input Report	Select the custom report that you created.
Run Frequency	Configure the operation to run now, in the future, or on a regular schedule.

6. Complete the Mass Operation Configuration tab:

Option	Description
Select a Role	Select the role you want to manage.
Inactivate	(Optional) Select this check box when you want to deactivate roles.
Complete Business Process	(Optional) Select this check box to bypass any approval steps in the business process for the created events.

7. (Optional) In the Schedule tab, enter the operation frequency.
8. Click Done.

Steps: Manage Internal Learning Instructors and Assessors in Bulk

Prerequisites

Security: *Mass Operation Management* domain in the System functional area.

Context

You can use a mass operation to activate or inactivate up to 50,000 internal learning instructors and assessors at once based on criteria specified in a custom report.

Workday excludes from this operation workers who are terminated, have in-progress *Manage Internal Learning Assessor* or *Manage Internal Learning Instructor* events, or already have an active internal learning assessor or internal learning instructor role. It also doesn't update workers who don't have an active assessor or instructor role when the role is revoked.

Steps

1. ../../../manage-workday/business-processes/manage-business-processes/ske1468876236571.dita

   You can create a new security group or edit an existing one and enable members to manage internal learning instructors and assessors. Select the *Internal Learning Instructors and Assessors Account Management* security segment.
2. ../../../authentication-and-security/configurable-security/security-policies/dan1370797389950.dita

   Grant the new segment-based security group Modify permissions on the *Mass Operation Management* domain.
3. ../../../authentication-and-security/configurable-security/security-change-control/dan1370796405018.dita
4. ../../../reporting-and-analytics/custom-reports-and-analytics/set-up-reports/dan1370797785951.dita

   Create a custom report based on a Worker report data source that defines the criteria for the users you want to activate or deactivate
5. Access the Mass Operation Management task.

   Complete these options:

Option	Description
Mass Operation Type	Select the Manage Internal Learning Instructors and Assessors operation type. Workday only displays this option when the user is a member of the segmented security group with access to the *Internal Learning Instructors and Assessors Account Management* segment.
Input Report	Select the custom report that you created.
Run Frequency	Configure the operation to run now, in the future, or on a regular schedule.
6. Complete the Mass Operation Configuration tab:

Option	Description
Select a Role	Select the role you want to manage.
Inactivate	(Optional) Select this check box when you want to deactivate roles.
Complete Business Process	(Optional) Select this check box to bypass any approval steps in the business process for the created events.
7. (Optional) In the Schedule tab, enter the operation frequency.
8. Click Done.

Steps: Set Up Express Interest for Learning Courses

Prerequisites

Configure the *Manage Course Offering* business process and security policy in the Learning Core functional area.

Context

You can enable learners to:

- Express interest in course offerings with specific dates and locations that suit them.
- Configure email notifications to tell them when these offerings become available.

Steps

1. (Optional) Configure the Location field on the Configure Optional Fields task.
2. Access the Edit Tenant Setup - HCM task.
   In the Learning section, select the Enable Express Interest check box.
   Security: *Set Up: Tenant Setup - HCM* in the System functional area.
3. Create 3 calculated fields for the *Manage Course Offering* business process:
   a) Use these values for the first calculated field:

Business Object	*Learning Course Offering Event*
Function	*Lookup Related Value*

   b) Select these prompt options on the Calculation tab:

Lookup Field	*Course Offering*
Return Value	*Matching Interests*

   c) Use these values for the second calculated field:

Business Object	*Learning Interest*
Function	*True/False Condition*

   d) On the Calculation tab, add a condition with these values:

Field	*Matching Course Offerings*
Operator	*count is less than or equal to*
Comparison Type	*Value specified in this filter*
Comparison Value	*2*

   Note: This comparison value ensures that a learner only gets 1 notification per interest expressed.

   e) Use these values for the third calculated field:

Business Object	*Learning Course Offering Event*
Function	*Extract Multi-Instance*

   f) Select these prompt options on the Calculation tab:

Source Field	Select the first calculated field you created.

Condition	Select the second calculated field you created.

4. Access the *Manage Course Offering* business process definition.
    a) From the related actions menu, select Business Process > Add Notification.
    b) Add the third calculated field to the Related Instances field in the Repeat On section.
    c) From the Trigger on Status prompt, select *Completed*.
    d) From the Recipients prompt, select *Learners*.
5. (Optional) Add the Expression of Interest in Learning Courses report to the Learning Admin dashboard.

    See Steps: Set Up Dashboards and Landing Pages.

Result

Learners can:

- Specify suitable course offering dates and locations.
- Receive a notification when an offering becomes available.

Next Steps

- Run the Expression of Interest in Learning Courses report to view learner demand.
- Schedule offerings based on the data.
- (Optional) Select the Disable Express Interest check box on the Create Course task.

Related Information
Tasks
Create Calculated Fields

Steps: Set Up Learning Discovery Boards

Prerequisites

- Review set up considerations for learning content and enrollments.
- Set up your tenant for Drive.

    See: ../../../manage-workday/tenant-configuration/content-management/drive/ymp1498691345885.dita.
- Security: These domains in the System functional area:
    - *Discovery Boards: Administration*
    - *Discovery Boards: Create*
    - *Discovery Boards: Manage Delivered Discovery Boards*

Context

Discovery Boards improve how you track and report on the quality of your learning content. You can configure and customize them to monitor ratings and learner engagement according to your organizational needs.

Steps

1. Access the Delivered Discovery Boards task.
2. Select Learning from the list of discovery boards available in your tenant.
3. Select Make a Copy and save it in your Drive.

4. Configure your Learning discovery board and select filters as you see fit.

   Workday updates indexed data sources and fields every hour.

Result

You can view detailed insights on learning content and enrollments for your organization.

Next Steps

You can:

- Customize the discovery board for your organization by adding visualizations and sheets.
- Share the discovery board with your learners.

Related Information

Tasks

Steps: Set Up Drive

Steps: Set Up Tenant for Discovery Boards

Steps: Create Visualizations

Set Up Curated Field Lists

Reference

2021 R2 What's New Post: Discovery Boards for Learning

Steps: Set Up Machine Learning for Learning Recommendations

Prerequisites

Add 1 or more of these worklets to your Learning dashboard:

- Based on Your Skills to Develop
- Recommended for You

Note: The steps for enabling this feature depend on your organization’s subscription service agreement. To determine your subscription service agreement, a Community user can:

1. Access your profile avatar on Community.
2. Select the Profile button.
3. On your profile page, select your organization's name underneath your name and to the right of your title.
4. View the Subscription Service Agreement value.

If the value is:

- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contribution step.
- *UMSA*, you can skip the optional Enable Innovation Services Features and Machine Learning Data Contribution step.

Context

Provide more relevant content recommendations for learners by enabling machine learning on these worklets:

- Based on Your Skills to Develop
- Recommended for You
- You Might Also Be Interested In

You can also enable machine learning to display Suggestions for You on learning paths. You must enable the Learner Experience learning paths feature to use this functionality.

See: Steps: Set Up Learning Paths on page 1943.

Steps

1. ../../../manage-workday/tenant-configuration/Machine-Learning-and-Innovation-Services/enable-innovation-services-feature-and-data-contribution.dita.

   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.

   On the Innovation Services Opt-In task, select the HCM ML Features and Third Party Connectors GA service on the Available Services tab in the HCM category.
2. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality.

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.
3. Access the Edit Tenant Setup - HCM task.

   Select the Enable Related Content Recommendations check box to enable the You Might Also Be Interested In worklet.

   The related learning content displays to all learners, including pre-hires.

Result

Workday updates machine learning data every 24 hours, Monday through Friday.

For the Based on Your Skills to Develop worklet, Workday:

- Enables you to configure it using the Maintain Learner Experience task.
- Focuses more on recommendations which will have more emphasis on learning content where the relevant skills are tagged to the content.
- Generates recommendations using the skills tagged on the content, those discovered using machine learning, and the learner's skill interests.
- Requires you to opt into the Learning Data category but provides a non-Machine Learning version of recommendations if you don't opt into it.
- Still uses inferred skills for recommendations but displays them further down in the ranking order. If a relevant skill isn’t tagged to a piece of learning content, Workday uses inferred skills for all recommendations.

The Recommended for You worklet provides learners relevant content based on the:

- Previous content the learners completed.
- Learner's Workday profile, including job profile, skills, resume, and education details.
- Learning patterns in content completed by workers in similar roles.

This worklet requires you to opt into the Learning Data and Worker Profile Data categories. Access the Maintain Innovation Services Data Selection Opt-In task and select the HCM: HCM ML Features and Third Party Connectors GA prompt to find the Data categories. Use the Maintain Learner Experience task to configure it.

The You Might Also Be Interested In worklet displays related content that learners might be interested in when they access or complete a course. Workday:

- Requires you to opt into the Learning Data category to use this worklet.
- Uses machine learning to identify related content based on characteristics such as the title, description, skills, and topics.

Suggestions for You displays recommendations for content to add to your learning paths. You must have at least 1 piece of learning content in your path to receive machine learning suggestions.

Related Information

Reference

Reference: Learning Content Organization on page 1902

2021R1 What's New Post: Machine Learning Recommended for You Worklet

2021R2 What's New Post: Learning Paths and Sharing

Workday Community: Learning Recommendations

Available Innovation Services – Service Descriptions and Exhibits

Configure Learning Dashboards

Prerequisites

Enable the security domains you want to use to secure your dashboards.

Security: These domains in the Learning Core and System functional areas:

- *Learning Access*
- *Manage: Learning Content*
- *Manage: Learning Course Enrollments*
- *Self-Service: On the Job Training*
- *Self-Service: Learning Instructor*
- *Set Up: Learning Catalog*
- *Set Up: Tenant Setup - Worklets*

Context

Learning dashboards consolidate administrative tasks and reports in a single location. Users access these dashboards based on configurable security.

Steps

1. Access the Maintain Dashboards report.
2. As you complete the report, consider:

Option	Description
Learning	Mobile and desktop experiences require separate configuration: • To display recommendations and required or optional learning to learners on the Worday mobile app, click Edit to access learning content reports and employee self-service (ESS) tasks for learners. • To configure the Learning dashboard on desktop, access the Maintain Learner Experience task. View Steps: Set Up Learner Experience on page 1940.
Learning Admin	Select worklets for administrative tasks and reports to: • Maintain the learning catalog. • Track the value and effectiveness of training. Workday displays menus for:

Option	Description
	• Training Activities: To view and maintain content for training activity lessons. • Campaigns: To create and edit audiences and message templates for campaigns.
Learning Trainer	Click Edit to enable assessors and instructors to manage lessons and enrollments for course offerings.
My Library	Click Edit to enable learners to manage their learning paths and create a personalized curriculum from the learning catalog.

Next Steps

Create or assign internal trainers.

Related Information

Tasks

Configure Dashboard Content

Reference

Reference: Learning Content Organization on page 1902

Maintain Learning Validations for Learning Enrollments

Prerequisites

Security: *Set Up: Learning Catalog* domain in the Learning Core functional area.

Context

A validation message is the message Workday displays to users when they can't drop or enroll in a course. Validation rules grant or prevent the drop or enroll action based on a predetermined set of parameters. You can use them to streamline workflows in situations that don't require the additional review or approval steps a business process might include.

Workday displays help text above any validation messages that trigger, so consider both the help text and the validation messages in context. If using together, use the help text for general informational purposes only and use individual learning validation messages to provide troubleshooting information for specific validation contexts.

You can use the Maintain Learning Validations report to create and manage custom validation messages for these business processes:

- *Drop Learning Enrollment*
- *Enroll in Content*

Steps

1. Access the Maintain Learning Validations report.
2. Select a course validation context.
3. Set a Severity level for the new validation:
   - *Critical:* Prevents users from dropping or enrolling in a course.
   - *Warning:* Alerts users but enables them to continue.

4. As you complete the Add New Custom Validation task, consider:

Option	Description
Description	The message that Workday displays to users when they can't drop or enroll in a course if you haven't configured a separate validation message. To configure a validation message for a *Critical* or *Warning* message, select Validation > Configure Validation Message from the related actions menu in the Validations column.
Category	(Optional) Assign a category to make the validation rule easier to find later. Create *Custom Validation Rule* categories on the Maintain Condition Rule Categories task.
Derived Logic	The statement that you've defined through the rule conditions. The field displays: • Existing statements. • New statements after you define and save them.
Copy Condition from Rule	(Optional) Copy and modify an existing validation rule to create a new one.

5. To ensure that the validation rules apply to the correct learning content type, configure rule conditions that specify the *Course Type* as either:

   - *Course Offering*
   - *Digital Course*

   You can only create validation rules for digital courses that require enrollment.

Example
To prevent workers from enrolling in a course offering when their primary location differs from the location of the course.

Description: The location of the course you have selected is different from your primary work location.

Derived Logic: Primary Location none in the selection list Location And Primary Location is not empty.

Field	Value
And / Or	And, And
Source External Field or Condition Rule	Primary Location, Primary Location
Relational Operator	none in the selection list, is not empty
Comparison Type	Value from another field, Value specified in this filter
Comparison Value	Location

Next Steps

- Select the Maintain Validations button on the Maintain Learning Validations report to view and manage changes to your validation rules.
- Use the Maintain Help Text task to configure help text for the business process.

Related Information

Tasks

Set Up Custom Validation Severity and Conditions

Maintain Drop Course Event Categories

Prerequisites

Security:

- *Set Up: Configure Optional Fields* domain in the System functional area.
- *Set Up: Learning Catalog* domain in the Learning Core functional area.

Context

You can create event categories to enable learners and learning administrators to provide reasons why they're dropping enrollments. Categorizing drop course reasons enables you to understand potential issues with learning content.

Steps

1. Access the Maintain Drop Course Event Categories task.
2. Enter a Reason Category such as *Difficulty Level* on the category row for the drop course reason.
3. Enter a Reason such as *Too Advanced* on the row for the drop course event subcategory.
4. (Optional) Access the Configure Optional Fields task.

   You can require the Learning Drop Course Reason field on the Drop Learning Enrollment task.

Related Information

Tasks

Hide or Require Optional Fields

Maintain Learning Unit Types

Prerequisites

- Security: *Set Up: Learning Catalog* domain in the Learning Core functional area.

Context

Workday Learning provides these standard unit types that you can add as units to courses and course offerings:

- *Continuing Education*
- *Continuous Professional Development*
- *Course Units*

If your organization needs additional unit types, you can create and manage them. When you add units to a course or course offering, we display them on the View Course report so that learners understand the units associated with the content and their value.

Steps

1. Access the Manage Other Unit Types task.
2. Configure the additional unit types that you require and set a value for each type.

Next Steps

You can add these unit types to the Units grid on these tasks:

- Create Course
- Edit Course
- Schedule Course Offering
- Edit Course Offering

Concept: Learning Topics

Topics enable you to categorize learning content, improving the learning catalog search and browsing experience for learners. You can associate topics with learning content when you:

- Create or edit a program, blended course, digital course, or stand-alone lesson.
- Configure external content.

You can configure segmented security for learning topics, if required.

From the Learning dashboard, learners can:

- Select Topics to browse learning content by topic.
- Set topic preferences to enable Workday to suggest personalized related content in the Based on Your Interests worklet.

Use the Create Learning Topic task to create topics that meet your learning catalog requirements, associating an icon or custom image with each topic. As a convenience, Workday delivers these standard topic icons:

- *Compliance and Legal*
- *Data Privacy and Security*
- *Finance and Administration*
- *Health and Safety*
- *IT and Software*
- *Management*
- *Marketing and Sales*
- *Operations*
- *Productivity*
- *Project Management*
- *Skills*
- *Team and Culture*

You can reuse the icons across multiple topics if you need to create additional topics beyond this list. You can only add 1 image per topic.

The ideal image size for a course, lesson, or topic cover image is within our 10,240 KB size restriction, and follows and aspect ratio of, or close to 1.79, where the width > height.

You can enter up to a maximum of 50 characters for your topic title. There's no limit set on how many topics you can create in Workday.

Related Information

Tasks

Steps: Set Up Cloud Connect for Learning Using Cloud Connect for Learning Platform on page 2038

Reference

The Next Level: Peer Learning

Examples

2025R1 Feature Release Note: Go1 Available in the CCL Platform

2025R1 Feature Release Note: O'Reilly Available in the CCL Platform

2025R1 Feature Release Note: Emtrain Available in the CCL Platform

2025R1 Feature Release Note: Big Think Available in the CCL Platform

2025R1 Feature Release Note: Intuition Available in the CCL Platform

2025R2 Feature Release Note: LinkedIn Available in the CCL Platform
2025R2 Feature Release Note: OpenSesame Available in the CCL Platform
2025R2 Feature Release Note: Speexx Available in the CCL Platform
2025R2 Feature Release Note: Udemy Available in the CCL Platform

Example: Create a Custom Report for Learning Unit Types

Context

You want to report on learning units associated with learning enrollments.

Steps

1. Access the Create Custom Report task.
2. Enter these values:

Option	Description
Report Name	*Unit Types for Learning Enrollments*
Report Type	*Advanced*
Data Source	*Learning Enrollments*

3. On the Edit Custom Report task, as you complete the Columns tab, add these rows:

Business Object	Field
Learning Enrollment	Learning Enrollment Learner
Learning Enrollment	Enrolled Content
Enrolled Content	Description
Learning Enrollment Record	Completion Status
Learning Enrollment Record	Completion Date
Learning Enrollment Record	Current Instructor
Learning Enrollment	Learning Units
Learning Units	Type
Learning Units	Value

4. On the Filter tab, add this row:

Field	Operator
Learning Units	*is not empty*

5. Click OK.

Reference: Learning Content Organization

Workday enables you to consolidate your learning content items on the dashboards of your learners. For optimal user experience, we limit the number on your Learning dashboard to 6.

Option	Description
Based on Your Interests	Displays content based on topics that learners select on the Learning Preferences task.

Option	Description
	Only displays programs, courses, and stand-alone lessons when available. Workday sorts content by: • Third-party external publication date. • Workday creation date.
Based on Your Skills to Develop	Displays recommendations and content relevant to the skills that a worker wants to develop or improve. Workday: • Focuses more on recommendations that will have more emphasis on learning content with the relevant skills. • Still uses inferred skills for recommendations but displays them further down in the ranking order. If a relevant skill isn't tagged to a piece of learning content, Workday uses inferred skills for all recommendations. You can enable machine learning on this worklet to provide more relevant content recommendations.
Continue Learning	Displays *in progress, not started,* and *unsuccessfully complete* learning content. If you opt into Learner Experience, add Continue Learning to your My Learning page to display in progress and not started content.
Highlights	Promotes content based on condition rules that you configure for specific learner groups on the Configure Learning Content Highlights task. Highlights display to learners when: • There's active highlighted content in your tenant to display and 1 or more rules apply to learners. • You haven't exceeded 6 items on your dashboard. Workday removes content when learners complete it.
Learning Paths	Displays personalized learning paths that learners can create from the learning catalog.
Most Popular	Workday bases popularity calculations for: • Blended courses, on the number of approved enrollments that aren't on a waitlist, but aren't complete. • Digital courses and programs, on the number of enrollments. • Stand-alone lessons, on the number of views.

Option	Description
	Only displays programs, courses, and stand-alone lessons when available.
My Learning	Displays complete, in progress, and not started learning content.
My Team's Learning	Displays learning progress for all direct reports in a single place.
Popular in your Role	Displays content that other workers in the learner's role have enrolled in. Workday runs a weekly job that gathers all completed content per job profile. We display image thumbnails for the top 20 learning content items and enable learners to view up to 100. We display this worklet for learners when: • There are 5 or more people in the role. • There's content in the learning catalog to recommend. • The job profile is public. • You haven't exceeded the limit on the dashboard. Extended Enterprise learners can't view this worklet on their dashboards because they don't have job profiles in Workday. We order content by popularity, taking into account the number of enrollments and their ratings. If you've disabled the Opportunity Graph and Popular in your Role and want to enable this functionality, use these domains to configure it: • *Self-Service: Opportunity Graph* • *Worker Data: Opportunity Graph* You'll experience a lag period until the next Workday maintenance service window before the learning content displays on your interface.
Progress	Displays learning history and enrolled content to learners.
Recently Added	Displays content added to your tenant recently through the user interface or web services. We display the content in order by creation date. Courses that require enrollment must be open.
Recommended for You	To display the Recommended for You worklet, you must enable machine learning. The Recommended for You worklet provides learners with relevant recommendations for content based on the:

Option	Description
	• Previous content the learners completed. • Learner's Workday profile, including job profile, skills, resume, and education details. • Learning patterns in content completed by workers in similar roles. When there are no recommendations available, Workday doesn't display the worklet.
Required for You	Workday creates these assignments for: • Manager enrollment. • Mass enrollment. • Retraining purposes. • Required learning campaigns. Only displays learning assignments with an open status.
You Might Also Be Interested In	Displays related content that learners might find interesting when they access or complete a course. You can configure machine learning to identify related content based on characteristics such as the title, description, skills, and topics. The related learning content displays to all learners, including pre-hires.

Related Information
Tasks
Configure Learning Dashboards on page 1897
Configure Dashboard Content
Steps: Set Up Opportunity Graph on page 1536
Steps: Set Up Machine Learning for Learning Recommendations on page 1895
Set Up Language Preferences for Learning Recommendations on page 1945

Learning Security

Setup Considerations: Segmented Security for Learning

You can use this topic to help make decisions when planning your configuration and use of segmented security in Learning. 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 segmented security enables you to provide specific users permission to create and access learning content.

For a use case related to this topic, see ../../../../use-case-library/use-case--learning-security-segments.dita in the Use Case Library.

Business Benefits

- Increase the effectiveness of learning in your organization as you can adopt a more targeted approach.
- Helps ensure confidentiality of sensitive learning content.
- Improves the user experience as they only access content that is relevant to them.
- Reduces administrative overhead as you assign content to the correct audience.
- Help keep your learning catalog up to date by enabling subject matter experts to create their own content.

Use Cases

- Provide access to learning content for different types of workers.
- Restrict access based on a worker's location, role, organization, or job.
- Provide different training course selections for sales and marketing as well as product development.
- Create different learning administrator groups to ensure that only subject matter experts can maintain subject matter courses.

Questions to Consider

Question	Considerations
What content do you want to secure?	You can secure: • At the program and course level by associating the content with a security category segment. • At the topic level. • At the catalog level, which includes all the applicable lessons, courses, and programs. You can also do a combination of topic and security category-based segmented security. Access to a security category on a program or course takes precedence over access to a topic. If you want to enable learners to select from the complete list of topic preferences, don't restrict access on a topic-by-topic basis.
Which content do you want to provide to different learning administrators and learners?	When configuring segmented security, consider which level of granularity administrators will need to maintain the learning catalog. You can create multiple copies of the Learning Administrator security group to achieve this level of granularity. You can then select the relevant Learning Administrator group when creating or editing a segment-based security group.
Do you want workers on leave of absence to be able to access Learning?	You can restrict access to entire programs, courses, or specific topics for workers who are on leave.

Question	Considerations
Do you have external content from third-party providers that you want to include in your learning catalog?	You can apply topic-based segmented security to external content. When you configure external content, you map it to topics in your learning content. Any topic-based segment that applies to those topics also applies to the external content.
Do you need to provide access to learning content to people outside of your company?	The Extended Enterprise Learning product enables you to give external users limited access. You can configure segmented security to restrict access to learning content for extended enterprise learners.

Recommendations

When you create or edit programs, Workday recommends that you associate the same:

- Security categories with programs and the courses that they contain so that learners have access to all course content items.
- Topics with programs and the courses and stand-alone lessons that they contain so that learners have access to all content items.

You can create topic security segments associated with 1 or more topics. When learning content has multiple topics, learners can access the content if they have access to any of the topics. When you use topic-based segments to secure content, Workday recommends that you select only 1 topic on each program, course, or stand-alone lesson.

If you find that learners can access content that's restricted by a segment-based security group on the *Learning Access* domain, and they're not members of the segment-based security group, ensure that they're not members of an unconstrained security group on this domain. Unconstrained security groups on the *Learning Access* domain override all segment-based security access.

In Production tenants, a search indexing job runs every 12 hours. In non-Production tenants, this job runs every 24 hours. Depending on the size of your learning catalog, the job itself can take a few hours to complete. Ensure the appropriate amount of time passes in your tenant before testing changes to:

- Topic-based segmented security.
- Security categories.
- Segment-based security groups and domains.

Requirements

When you configure worklets on the Maintain Dashboards report for the Learning dashboard, ensure that the segment-based security groups on the Required for Groups prompt match the groups on the *Learning Access* domain.

Limitations

Learners can still view, but can't access, completed programs and courses in their enrollment history after you change the segmented security configuration to remove their access.

You can't create a proxy access policy for administrators that provides segmented security access to learning content. You can only use unconstrained security groups on proxy policies.

Tenant Setup

You can select the Enable Security Categories check box in the Learning section on the Edit Tenant Setup - HCM task to display a Security Category prompt when creating courses and programs.

Security

Domain	Considerations
Learning Access domain in the Learning Core functional area.	Provides access to the learning catalog for both self-service and administrative reports and tasks. When you add segment-based security groups to this domain, Workday restricts access to all content by security category or topic segment. Before you add any segment-based group to the domain, ensure that you consider all users. If you have any segment-based security groups on this domain when you create a new topic, you must add the topic to a topic segment on the domain.
Manage: Learning Content in the Learning Core functional area.	Provides access to learning content management tasks and reports.
Manage: Learning Course Enrollments in the Learning Core functional area.	Provides access to administrative-based enrollment tasks. You can configure unconstrained access for users or restrict access using security category or topic segments.
Set Up: Learning Catalog in the Learning Core functional area.	Provides access to the learning catalog for administrative reports and tasks.
Manage: Media Import in the Backpack Hub Service functional area.	Allows users to import large volumes of video and packaged content media files. This domain is only available when you enable Media Cloud in your tenant.

Business Processes

You can add segment-based security groups associated with topic and security category segments to the security policies on the *Manage Lesson* business process to enable them to create and edit stand-alone lessons.

Reporting

Segmented security in Learning primarily applies to the Learning Content report data source, which you can use to create or edit custom reports relating to your learning catalog. Workday also delivers these reports that use this data source:

Reports	Considerations
Browse Learning Content	Enables security groups with access to a particular security category segment to find the restricted content.
Courses and Lessons Created (Last 12 months)	Enables you to monitor the rate at which users create learning content.
Learning Content by Rating	Identifies the learning courses and stand-alone lessons that are performing poorly in terms of rating, as well as the highest performing content in your tenant.

Reports	Considerations
Manage Learning Security Segments	Use this report to view your Learning security set up. You can also configure: • Who can access your learning topics. • Which users are members of which security category.
Manage Learning Content	Enables learning administrators to view and edit learning content.
My Team's Peer Learning Content	Enables managers to view a summary of learning progress for all direct reports and pre-hires. You can configure the report to display on the My Team Management dashboard.

Integrations

You can use these web services to create and update segmented security for Learning:

- *Get Learning Security Categories*
- *Get Learning Topic Security Segments*
- *Put Learning Security Category*
- *Put Learning Topic*
- *Put Learning Topic Security Segment*

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.

Related Information

Concepts

Reference: Access to Learning Content by Report on page 1918

Tasks

Create Segment-Based Security Groups

Steps: Maintain Access to Learning Content on page 1914

Steps: Set Up Cloud Connect for Learning Using Cloud Connect for Learning Platform on page 2038

Reference

Workday Community: Getting Started with Media Cloud

Workday Community: Topic Based and Course Based Security

The Next Level: Prepare for a Workday Learning Deployment

The Next Level: Peer Learning

The Next Level: Learning Topic and Course Segmented Security

Examples

2025R1 Feature Release Note: Go1 Available in the CCL Platform

2025R1 Feature Release Note: O'Reilly Available in the CCL Platform

2025R1 Feature Release Note: Emtrain Available in the CCL Platform

2025R1 Feature Release Note: Big Think Available in the CCL Platform

2025R1 Feature Release Note: Intuition Available in the CCL Platform

2025R2 Feature Release Note: LinkedIn Available in the CCL Platform

2025R2 Feature Release Note: OpenSesame Available in the CCL Platform

2025R2 Feature Release Note: Speexx Available in the CCL Platform

2025R2 Feature Release Note: Udemy Available in the CCL Platform

Setup Considerations: Pre-Hire Access to Learning

You can use this topic to help make decisions when planning your configuration and use of pre-hire access to Learning. 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

When pre-hires have a confirmed start date, you can grant them access to Learning content so they can start their training in advance.

Business Benefits

- Organizations can meet their compliance needs by enabling pre-hires to complete required training before their first day on the job.
- Pre-hires can experience the culture of their future workplace before they start.
- You can include pre-hires in audiences for learning campaigns.
- You can create a single learning catalog and restrict access for pre-hires to specific content, eliminating the need to create separate catalogs.
- You can update the security groups of pre-hires to employees or contingent workers, providing a smooth transition.

Use Cases

Pre-hires can:

- Complete required training such as safety regulations or a code of conduct course.
- Consume learning content relevant to their roles or organizations such how to operate a piece of machinery or use an application.

Questions to Consider

Questions	Considerations
Do you want to restrict access to your learning catalog?	You can provide access to the learning catalog and use segmented security to restrict pre-hire access to courses and topics. Example: You can restrict access to items that they can't complete until after they start.
What kind of pre-hires do you want to grant Learning access?	You can configure security and worklets to make content available for contingent pre-hires and full-time pre-hires on their dashboards before their start dates. If a pre-hire must complete the content before their start date, you can also configure the Required for You worklet on the Onboarding dashboard to make the content available.
Do you need to mass enroll pre-hires on a regular basis?	You can mass enroll large numbers of pre-hires using a custom report based on the Find Workers

Questions	Considerations
	report with modifications to the sort, prompts, and advanced settings.
Do you plan to use campaigns for pre-hire Learning content?	When creating a campaign, consider whether your audience is a pre-hire, employee, or both. Only include content that is relevant to their required learning.

Recommendations

- Restrict your learning catalog so that pre-hires are only able to access content that is relevant to them.
- Configure worklets on your Learning dashboard so that pre-hires can access learning content.

Requirements

Remove the *Enable dynamic removal and resend* option on the exclusion rule on learning campaigns to ensure that the campaigned content remains required learning when pre-hires transition to employees.

Limitations

You can only grant Learning access to pre-hires after you enter a confirmed start date for them in Workday.

Tenant Setup

No impact.

Security

Domains	Considerations
Learning Access in the Learning Core functional area	Users can: • Complete lessons. • Search the catalog. • Set preferences. • View content progress. • View content information.
Self-Service: Learning in the Learning Core functional area	Users can view their learning history transcripts.
Self-Service: Take Surveys in the System functional area	Users can access Workday surveys in learning course lessons.
Worker Data: Public Worker Reports in the Staffing functional area	Managers can search for their workers and view their pre-hire content completion on the worker profile.

Business Processes

To add pre-hires as a security group that can start or initiate a business process, configure these business processes and their security policies in the Learning Core functional area:

Business Process	Considerations
Drop Learning Enrollment	Enables learners to drop an enrollment for a program, a course offering, or a digital course (both internal and external).
Enroll in Content	Enables learners to enroll in a course offering or a digital course (both internal and external).

Reporting

When creating pre-hire audiences for learning campaigns, you can select custom reports that use the All Workers for Pre-Hires report data source (RDS). This RDS provides all workers with a future start date.

You can use these reports and dashboards:

Reports or Dashboards	Considerations
Browse Learning Content report	Pre-hires can run this report to search for learning content.
Learning dashboard	You can grant pre-hires access to this dashboard so they can complete learning content and self-service tasks.
Learning Admin dashboard	Access tasks, reports, and dashboards that enable you to create and manage content and campaigns for pre-hires.
My Library report	Pre-hires can view their learning paths on this report. Learning paths enable pre-hires to create a personal curriculum by adding relevant onboarding videos to their library as they consume learning content.

Integrations

You can use these web services to enroll pre-hires in learning courses:

Web Services	Considerations
Enroll in Learning Course	Enables you to enroll learners into blended or digital courses.
Put Learning Enrollment	Enables you to update an existing enrollment or create legacy enrollments.

Connections and Touchpoints

Features	Considerations
Staffing	You can create required learning campaigns to display on the Required for You worklet on the Onboarding dashboard.
Talent	You can enable learners and their managers to access their pre-hire learning history.

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: Security in Learning on page 1916

Tasks

Steps: Configure Pre-Hire Access to Learning Content on page 1916
Steps: Set Up and Launch Learning Campaigns on page 1973
Steps: Set Up Profiles and Profile Groups
Steps: Set Up Worker Onboarding on page 746

Steps: Set Up Security for Learning

Context

You can set up security to determine who can create, manage, and consume learning content. Workday Learning enables you to configure granular domain access for tasks and reports that your organization uses to manage:

- Learning content.
- Learning enrollments.
- Reminders for courses with expiration dates.

Steps

1. Create User-Based Security Groups.

   Create security groups for your learning administrators to support the level of granularity that you require to manage learning and assign users.
2. Access the Maintain Functional Areas task.

   Enable these functional areas:

   - Common Financial Management
   - Learning Core

   Security Configuration domain in the System functional area.
3. Edit Domain Security Policies.

   Configure security domains for Learning.
4. Edit Business Process Security Policies.

   Configure these business processes security policies:

Business Process	Edit
Enroll in Content	To enable primary and secondary instructors to approve enrollments, add the Internal Learning Instructor as Self and External Learning Instructor as Self security groups on the approval step. To enable assessors to manage training content, add the Learning Assessor as Self security group on the *Self-Service: On the Job Training* domain.
Manage Course Offering	To enable learning administrators or instructors to move instructor-led classroom training in course offerings online, add their security groups on the *Update Offering to Online Only* initiating action.

5. Activate Pending Security Policy Changes.

Related Information

Concepts

Concept: Security Groups

Concept: Expiry Periods for Learning Content on page 2014

Tasks

Create Business Process Condition Rules

Reference

Reference: Security Domains for Learning on page 1922

Reference: Learning Business Processes on page 1918

Steps: Maintain Access to Learning Content

Prerequisites

Read Concept: Security in Learning on page 1916.

Context

You can restrict access to learning content using segmented security based on:

- Security categories on courses.
- Security categories on programs.
- Topics.

Security categories on courses and programs provide more granular security. When you view a topic, you can only view programs or courses that you have permission to view based on the security category on the program or course. Programs and courses that have no security category are open to all users with access to Learning, provided they have access to the topic.

Topic-based segmented security applies separately to programs and courses. Learners can view a program when they have access to all of the topics associated with the program, but can only view each course within the program if they have access to the topics associated with the course.

Steps

1. Access 1 of these tasks:
    - Create Learning Security Category
    - Create Learning Security Segment

   Create security segments to restrict access by security category or topic, or both.

   Security: *Set Up: Learning Security Segments* domain in the System functional area.
2. Create Segment-Based Security Groups.

   If existing security groups don't meet your business requirements, create the security groups to associate with the security segments. Map these groups to 1 or more of the learning security category or topic security segments.

   The security groups that you grant access to in the Group Criteria section must be unconstrained.
3. Edit Domain Security Policies.

   Grant your learning segment-based security groups access on the *Learning Access* domain so that members of these groups can access content on the Learning dashboard.
4. Activate Pending Security Policy Changes.

5. Access the Edit Tenant Setup - HCM task.

   In the Learning section, select the Enable Security Categories option to display a Security Category prompt on these tasks:

   - Create Course
   - Create Program
   - Edit Course
   - Edit Program

   See Reference: Edit Tenant Setup - HCM.

Example

This example illustrates how to grant access for managers to a management-related topic and make other topics available to all.

1. Create 3 topics:
   - *Management*
   - *Health and Safety*
   - *Skills*
2. Create 2 learning topic security segments. Example:
   - Name the first segment *Topics for Managers* and select the *Management* topic.
   - Name the other segment *Public Topics* and select the *Health and Safety* and *Skills* topics.
3. Create 2 segment-based security groups: 1 for managers and 1 for everyone else. Example:
   - *Managers*
   - *Public*

   For each of these security groups, select:

   - 1 or more groups from Group Criteria. Example:
     - For *Managers*, select *Manager (Unconstrained)*.
     - For *Public*, select:
       - *All Contingent Workers*
       - *All Employees*
   - The learning topic security segments to grant access to in Access Rights. Example:
     - *Topics for Managers*
     - *Public Topics*

Next Steps

Create learning content such as:

- Programs, courses, and stand-alone lessons that contain topics.
- Programs and courses with security categories.

Test the security policy changes.

Note: In Production tenants, a search indexing job runs every 12 hours. In non-Production tenants, this job runs every 24 hours. Depending on the size of your learning catalog, the job itself can take a few hours to complete. The search indexing job is required to populate the Learning dashboard and for relevance searching in Learning. After configuring topic-based segmented security, security categories, and associated segment-based security groups and domains, ensure that you allow the appropriate amount of time to pass in your Production or non-Production tenant before testing these changes.

For each segment:

- Sign in as a user who's a member of a segment-based security group associated with a topic or security category.
- Verify that you can access the learning content for that segment.

Related Information

Reference

The Next Level: Learning Topic and Course Segmented Security

Steps: Configure Pre-Hire Access to Learning Content

Prerequisites

- Read Reference: Security Groups for Pre-Hires on page 630.
- Consider restricting access to your learning catalog and use segmented security to restrict the topics you display to your pre-hires.
- Security: *Security Configuration* domain in the System functional area.

Context

Set up access to enable pre-hires to consume learning content before their start date.

Steps

1. Configure access for the *All Pre-Contingent Workers*, *All Pre-Employees*, or *All Employees* security groups for these domains:
    - *Learning Access*
    - *Self-Service: Learning*
    - *Self-Service: Take Surveys*
    - *Worker Data: Public Worker Reports*
2. To add pre-hires as a security group that can start or initiate a business process, configure these business processes and their security policies in the Learning Core functional area:
    - *Drop Learning Enrollment*
    - *Enroll in Content*
3. Access the Maintain Dashboards report.

    In the Required for Groups prompt in the Worklets section of these dashboards, provide access to pre-hire security groups:
    - Learning
    - My Library (for access to the Learning Paths worklet)
    - Onboarding

    See Steps: Set Up Dashboards and Landing Pages.

Concept: Security in Learning

You can restrict access to learning content using:

- *Access Learning Media* as the Access Restriction for Authentication Condition rule on the Manage Authentication Policies report to restrict media access based on IP restrictions.
- Security category segments for programs and courses associated with a particular security category. Learners who are members of a security group with access to the segment can find the restricted content using the Browse Learning Content report.

- Topic security segments for learning content associated with a particular topic. Topic-based security creates a more contextual user experience for learners so that:
  - Only members of learning administrator groups with access to a specific topic segment can create content for topics within the segment.
  - Only learners with access to a specific topic segment can view content and create stand-alone lessons for topics within the segment.

If learners have access to a category on a program or course, but don't have access to the associated topic, Workday includes the content in the Browse Learning Content report, but excludes the topic from the Topics view.

If the security changes for a program or course after learners have completed the content, and those learners no longer have access, the content remains in their enrollment history, but they can't view the details.

The *Learning Access* domain in the Learning Core functional area provides segmented access to the catalog. If you add any segment-based security groups for security categories or topics to this domain, Workday restricts access to all content by security category or topic segment. Users can only access content associated with security categories or topics in those segments, if they're members of the security group within the Group Criteria of the segment-based group.

You can add groups based on these Workday-delivered security types to the *Learning Access* domain:

- *Public Groups*
- *Segment for Learning Category*
- *Segment - Learning Topic*
- *User-Based Groups*

Note: To provide access to all learning self-service tasks, learners need *View and Modify* access to the *Learning Access* domain.

Use the Manage Learning Security Segments report to view your Learning security set up. You can also configure:

- Who can access your learning topics.
- Which users are members of which security category.

Related Information

Concepts

Concept: Configurable Security

Concept: Security Groups

Concept: Locations and Location Hierarchies

Tasks

Create Access Restrictions

Steps: Set Up Cloud Connect for Learning Using Cloud Connect for Learning Platform on page 2038

Examples

2025R1 Feature Release Note: Go1 Available in the CCL Platform

2025R1 Feature Release Note: O'Reilly Available in the CCL Platform

2025R1 Feature Release Note: Emtrain Available in the CCL Platform

2025R1 Feature Release Note: Big Think Available in the CCL Platform

2025R1 Feature Release Note: Intuition Available in the CCL Platform

2025R2 Feature Release Note: LinkedIn Available in the CCL Platform

2025R2 Feature Release Note: OpenSesame Available in the CCL Platform

2025R2 Feature Release Note: Speexx Available in the CCL Platform

2025R2 Feature Release Note: Udemy Available in the CCL Platform

Reference: Access to Learning Content by Report

You can use segment-based security to configure access to learning content, depending on your security requirements. Workday restricts access to content on some reports, depending on whether learners are members of security groups with access to a topic or security category.

Learner Access Scenario	Access by Report
Access to the topic on a course but not to the security category.	Learners can't access the course on these reports: • Browse Learning Content • Topics
Access to the security category on a program or course, but not to the topic.	Learners can access the program or course on the Browse Learning Content report, but can't browse to the content from the Topics report.
Access to the security category on a program, but not to the security category on a course content item.	Learners can access the program but not the course on these reports: • Browse Learning Content • View Learning Program
Access to the topic and security category on a program, but not to the topic on a course content item.	Learners can't access the course on the Topics report. However, they can access the program and the course on these reports: • Browse Learning Content • View Learning Program
Access to the topic on a program, but not to the security category on a course content item.	Learners can access the course on the Topics report, but can't access the course on these reports: • Browse Learning Content • View Learning Program

Related Information

Concepts

Concept: Security Groups

Reference: Learning Business Processes

Workday delivers these business processes in the Learning Core and Extended Enterprise for Learning functional areas. Use them to configure and define the security policies for learning in your organization and for your extended workforce.

Business Process	Functional Area	Description
Cancel Course Offering	Learning Core	Initiates when you cancel a course offering. You can create condition rules and custom notifications on the *Cancel Course Offering* business process, using report fields for learning content on the Learning Course Offering Management Event business object.

Business Process	Functional Area	Description
Cancel Learning Enrollment	Learning Core	Initiates when you cancel an enrollment for a course offering. You can create custom notifications on the *Cancel Learning Enrollment* business process, using report fields for learning content on the Learning Enrollment Event business object. To be eligible for cancellation, ensure that the enrollment is not part of a *completed* program or has an associated: • Equivalency record. • Expiration date. • Learning assignment. • Pricing record.
Drop Learning Enrollment	Learning Core	Initiates when learners drop an enrollment for a program, a course offering, or a digital course (both internal and external). You can create condition rules and custom notifications on the *Enroll in Content* business process, using report fields for learning content on the Learning Enrollment Event business object. Example: Learners can drop on-demand courses without manager approval, but not if they're required learning (either campaigned courses or manager enrolled). Use these report fields to define a condition rule to remove manager approval for on-demand courses flagged as required learning: • *On Demand Enrollment* • *Required Learning Enrollment*
Edit Course Additional Data	Learning Core	Initiates when you enable selected security groups to approve the addition of custom fields to learning courses.
Edit Course Offering Additional Data	Learning Core	Initiates when you enable selected security groups

Business Process	Functional Area	Description
		to approve the addition of custom fields to learning course offerings.
Edit Program Additional Data	Learning Core	Initiates when you enable selected security groups to approve the addition of custom fields to learning programs.
Enroll in Content	Learning Core	Initiates when learners enroll in a course offering or a digital course (both internal and external). If a course is full, the *Waitlist in Course* initiating action enables learners to waitlist until a seat is available. When a course begins, Workday automatically drops learners from the waitlist. You can create condition rules and custom notifications on the *Enroll in Content* business process, using report fields for learning content on the Learning Enrollment Event business object.
Manage Course	Learning Core	Initiates when you create and edit learning courses and manage their versions.
Manage Course Offering	Learning Core	Initiates when you schedule or edit course offerings, or update offerings to a new course version. Configure the business process security policy to enable learning administrators or instructors to move instructor-led classroom training in course offerings online. Grant access to security groups for the *Update Offering to Online Only* initiating action. Configure the Copy Course Offering task by granting access to security groups for the *Copy Course Offering* initiating action on this business process to create a copy of an existing course offering.
Manage Equivalency Rule	Learning Core	Initiates when you create and edit equivalency rules.

Business Process	Functional Area	Description
Manage Extended Enterprise Learner	Extended Enterprise for Learning	Initiates when you create or edit extended enterprise learners.
Manage External Learning Assessor	Extended Enterprise for Learning and Learning Core	Initiates when you create or edit an external learning assessor.
Manage External Learning Instructor	Learning Core	Initiates when you create or edit external learning instructors.
Manage External Learning User	Extended Enterprise for Learning and Learning Core	Initiates when you create or edit external learning user accounts.
Manage Internal Learning Assessor	Learning Core	Initiates when you create or edit an internal learning assessor.
Manage Internal Learning Instructor	Learning Core	Initiates when you create or edit internal learning instructors.
Manage Learning Certification Rule	Learning Core	Initiates when you issue or update certifications for learning content.
Manage Lesson	Learning Core	Initiates when you create and edit internal stand-alone lessons.
Manage Program	Learning Core	Initiates when you create and edit learning programs and manage their versions.
Mass Cancel Learning Enrollments	Learning Core	Initiates when you cancel multiple enrollments for 1 or more course offerings. You can create custom notifications on the *Mass Cancel Learning Enrollments* business process, using report fields for learning content on the Learning Enrollment Event business object.
Mass Enroll	Learning Core	Initiates when: • Managers enroll their team members in learning courses. • Users with access to the Find Workers to Enroll report run the Learning Facilitated Enroll task. Once you configure this business process for Manager Enroll, Workday displays an Enroll My Team button on these reports: • View Course • View Digital Course

Business Process	Functional Area	Description
		For the Learning Facilitated Enroll task, Workday displays a Facilitated Enroll button on the Find Workers to Enroll report.
Request Extended Enterprise Learner	Extended Enterprise for Learning	Initiates when affiliation managers request learning access for new or existing users for their affiliations. Workday recommends first configuring these business processes, which are subprocesses on the *Request Extended Enterprise Learner* business process: • *Manage External Learning User* • *Manage Extended Enterprise Learner*

Related Information

Tasks

Create Custom Business Processes

Edit Business Process Security Policies

Edit Business Processes

Reference: Security Domains for Learning

You can configure these domains in the Learning Core and Extended Enterprise for Learning functional areas. They provide access to tasks and reports for Learning and Extended Enterprise Learning.

Domain	Description
Learning Access	Provides access to learning self-service tasks and reports. Learners with access to this domain can: • Search for learning content. • View programs, courses, and lessons. • Set their learning preferences. • Complete learning surveys. • View their progress for learning content. • Express interest in courses. • Add content to learning paths.
Maintain Archived External Learning User	Provides access to the Unarchive External Learning User task, which enables users to unarchive external learning users who aren't active workers.
Manage: Create and Edit Learning Roles	Provides access to administrative tasks and reports to manage learning assessors and instructors.
Manage: E-Commerce for Learning	Enables administrators to set up and configure the learning content payment processor.

Domain	Description
Manage: Extended Enterprise	Provides extended enterprise learning administrators with the ability to manage affiliations, job profiles, and dashboard access.
Manage: Extended Enterprise Affiliation Learners	Provides affiliation managers access to extended enterprise learners in their affiliation.
Manage: Extended Enterprise Learner Type	Provides users with the ability to create and manage extended enterprise learner types. Users with View access on the *Manage: Extended Enterprise* domain can view the learner type you assign to an extended enterprise learner.
Manage: Facilitated Enrollments	Provides selected users with access to the Find Workers to Enroll report to manage enrollments for blended and digital courses. We recommend that users with access to this domain don't have access to the *Manage: Learning Course Enrollments* domain. This ensures they can only enroll learners that they have access to. You can add a validation on the *Mass Enroll* business process definition to prevent selected user groups from enrolling learners into required learning.
Manage: Learner Content Subscriptions	Provides access to learning content subscription functionality for extended enterprise learners who need to access learning content for a certain time period.
Manage: Learning Additional Data	Provides administrator access to create and manage custom objects for learning content.
Manage: Learning Assignment	Provides administrator access to manage campaign record assignments and learning assignment waive reasons. Configure this domain to grant *View* and *Modify* permission to the Learning Administrator security group.
Manage: Learning Certifications	Provides access to administrative tasks and reports to manage Learning and Talent certifications.
Manage: Learning Content	Provides access to some administrative tasks and reports to manage learning content.
Manage: Learning Course Enrollments	Provides access to administrative based enrollment tasks. You can configure the domain security policy to provide access for users in an unconstrained user group. These users aren't Learning Administrators, but can mass enroll and mass drop learners from courses in the organizations they support. You can also restrict access using learning security category or topic segments.

Domain	Description
Manage: Learning Pricing	Provides access to most tasks for configuring pricing enablement, including: • Training credit mappings. • Learning organization payment configurations. • Prices and advanced pricing rules on courses and course offerings.
Manage: Learning Pricing Rules	Provides access to create condition rules for pricing enablement.
Manage: Learning Virtual Classroom Integration	Provides access to web services that manage the virtual classroom integration for your tenant. Workday recommends that you create an Integration System User (ISU) and grant them *View* and *Modify* permission on the new domain. We recommend using these user names for virtual classroom integration with Microsoft Teams: • For the ISU: *Learning_Integrations_User*. • For the ISSG: *Learning_Integrations_Group*.
Manage: Mass Enrollments	Provides constrained access to these tasks: • Mass Drop by Role • Mass Enroll by Role
Self Service: On the Job Training	Provides access to tasks, reports, and data related to training activity lessons. You can configure this domain to grant *View* and *Modify* permission to these security groups: • Self Service - External Learning Assessor • Self-Service - External Learning Instructor • Self Service - Internal Learning Instructor • Self-Service - Learning Assessor
Manage: Self-Registration	Provides extended enterprise learning administrators with the ability to manage and report on self-registration URLs.
Manage: Unrestricted Mass Enrollments	Provides unrestricted access to the Find Workers to Enroll report and these tasks: • Learning Mass Enroll • Mass Drop
Person Data: Certifications	Provides access to another person's certification information.
Person Data: Learning	Provides access to another person's learning transcript.
Reporting: Learning Pricing	Provides access to data sources for reporting on pricing configuration and enrollment pricing records.

Domain	Description
Reports: Archived External Learning Users	Provides access to reports that display information on archived external learning users.
Reports: Extended Enterprise Affiliations	Provides access to reports on extended enterprise affiliations.
Reports: Extended Enterprise Affiliation Learners	Provides affiliation managers access to reports on learners in their affiliation.
Reports: Extended Enterprise Usage Metrics	Provides access to reports that enable you to track the number of active extended enterprise learners in your tenant. You can use this information to measure your product usage over time.
Reports: Learning Campaign Records	Provides access to the Learning Campaign Record report data source, enabling you to report on learning campaigns.
Reports: Learning Record	Provides access to reports that display learning record data, including: • Assignments. • Enrollments. • Equivalencies. • Historical tracking. • Media tracking.
Self-Service: Certifications	Provides users with access to their certification information.
Self-Service: Extended Enterprise Learning	Provides extended enterprise learners with the ability to view their own information.
Self Service: Learning	Provides access to the learner to view their course calendar and learning transcript.
Self-Service: Learning Assessor	Enables external learning assessors to view their profiles.
Self-Service: Learning Instructor	Provides access to roster management tasks and reports such as: • Instructor schedules. • Grading and attendance for course offerings. • Waitlists. You can grant unrestricted access or restrict access so instructors can view enrollment and grading information only on courses for which they are the primary or secondary instructor. Grant permissions to the: • All Internal Learning Instructors and All External Learning Instructors security groups for unrestricted access.

Domain	Description
	• Internal Learning Instructor as Self and External Learning Instructor as Self security groups for restricted access.
Set Up: Learning Catalog	Provides access to a large number of tasks and reports that enable administrators to manage learning content.
Set Up: Learning External Content Integrations	Provides access to the Configure External Content task and the external content integrations for Learning.
Set Up: Sale Item	Provides access to tasks and reports that enable you to manage sales items for learning program and course costs.
View External Learning User	Provides access to view external learning users.
View: Sale Item	Provides access to view a specific sales item.

You can configure these domains in the System functional area.

Domain	Description
Calendar Download Access	Provides access to download iCalendar (.ics) files.
Drive	Provides access to the Drive user interface to create and manage Workday files associated with media files.
Set Up: Learning Security Segments	Provides access to administrators to manage security segments for learning content.
Questionnaire Creation and Distribution	Provides access to questionnaires in learning survey lessons.
Questionnaire Results	Provides access to tasks and reports related to results in learning survey lessons.
Self-Service: Take Surveys	Enables learners to participate in learning survey lessons.

You can configure these domains in the Backpack Hub Service functional area.

Domain	Description
Manage: Media Advanced	Provides access to manage media and set passing scores on video interactions.
Manage: Media Settings	Provides access to manage settings for media content.
Media Reporting	Provides access to media tracking data for reporting.

Related Information

Reference

2023R2 What's New Post: Managed Self-Registration

Learning Pricing

Setup Considerations: Pricing

You can use this topic to help make decisions when planning your configuration and use of Pricing Enablement for Learning. 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 enables you to configure pricing and price display options, including direct e-commerce capabilities, for learning courses and course offerings. You can configure prices in different currencies and use condition rules to set prices for groups of learners and extended enterprise learners. Workday creates pricing records for each enrollment. You can report on prices or use web services to send them to applications that support billing or payment processing.

Business Benefits

Pricing your learning content and allowing learners to purchase it through a third-party payment processor enables you to:

- Communicate the value of your training by displaying prices to users.
- Report on prices associated with each course or course offering enrollment.
- Monetize your training and create new revenue streams.

Use Cases

This table describes use cases for pricing learning content:

Audience	Use Case
External (Extended Enterprise)	Strategically price learning content according to contracts with customers, partners, and other extended enterprise affiliates.
Internal (Learning)	Track and measure the value of interdepartmental training programs.

Questions to Consider

Questions	Considerations
Who do you want to configure pricing for?	Workday supports pricing enablement for workers and extended enterprise learners. You can enable functionality for workers only, extended enterprise learners only, or both.
Which time zone is most appropriate for enabling new training credit mappings?	New mappings that go into effect can impact currency values and prices for all users. Consider which time zone will minimally impact your users and select it from the Time Zone Credit Mapping prompt in tenant setup. If you don't select a time

Questions	Considerations
	zone, training credit mappings become effective on pacific time.
Which currencies should I plan to include in my training credit mappings?	You can configure whichever currencies you want to display prices in. The currencies you include in your training credit mappings have no relationship to currency used elsewhere in Workday, nor do they respect the preferred currencies of individual users. Consider the audiences who will consume your learning content and the currencies you need to communicate value to them. Each supervisory organization and extended enterprise affiliation can only have 1 currency.
How many training credit mappings can I create?	You can create as many training credit mappings as you want, but only 1 can be in effect at a time. You can prepare new training credit mappings for the future and set an effective date so they automatically apply when ready. You can't edit or delete training credit mappings that are currently in effect. To change an existing training credit mapping, you must copy it, edit it, then set a new effective date.
Who should be in charge of pricing administration functionality?	Workday secures pricing functionality to different domains than learning administration functionality. Administrators who manage your learning catalog might not understand your pricing strategy or contractual obligations with your affiliates. Similarly, pricing administrators might not understand the details of individual courses. Consider this as you decide: • Who gets access to pricing and pricing rule security domains. • How you might configure business process definitions to ensure appropriate approvals.
What are the differences between course costs and pricing?	The Costs section on the Create Course task is intended to itemize and display the cost of course-related expenses and materials on the course. The Pricing section is for configuring the enrollment price for a course. You might need to explain these differences to users who can edit courses.
Can I use decimals in pricing configurations?	You can enter up to: • 10 digits before the decimal point and 5 digits after the decimal point in training credit mappings and course prices. • 12 digits before the decimal point and 4 digits after the decimal point in pricing rules. The final calculated price for a course can have up to 20 digits before the decimal point and 10 digits after.

Questions	Considerations
	Workday rounds prices for learners who view pricing enabled learning content to the decimal place appropriate for each currency. Example: Prices in USD round to the hundredths decimal place while prices in JPY round to the nearest whole number. In custom reporting, you can use either rounded report fields or unrounded report fields on the Learning Enrollment Pricing Record data source.
How do learners browse and access e-commerce enabled courses?	The Manage Learning Content report allows you to identify purchasable learning content and configure custom sliders that will present this information to learners.

Recommendations

Create pricing rules to change the price of a course for a set of users who meet the conditions you define.

Requirements

To use pricing and e-commerce, you must subscribe to Workday Learning. You can also use pricing and e-commerce with Extended Enterprise Learning.

Workday requires these components to calculate the price for an enrollment:

- A training credit mapping with a current effective date.
- A payment configuration for the organization the learner belongs to.
- A default price, or training credit value, on the course or course offering with pricing enabled.

Limitations

- You can't price learning programs or stand-alone lessons.
- You can’t use mass enrollment or Enroll My Team methods for e-commerce enabled courses.
- Learners can’t purchase multiple courses with a single payment.
- You can’t drop enrollments that are in *pending payment* state. To do it, you must cancel the associated event.

Tenant Setup

The Enable Pricing Configuration for Person Types prompt enables the configuration of prices for workers or extended enterprise learners. If you disable pricing configuration, you can still:

- Report on enrollment prices.
- Use web services to get pricing data out of Workday.
- Use web services to specify training credits and pricing rules for courses.

Security

These domains in the Learning Core functional area:

Domain	Considerations
Manage: E-Commerce for Learning	Secures the tasks related to the learning content payment processor configuration.

Domain	Considerations
Manage: Learning Pricing	Secures most pricing configuration functionality for pricing administrators.
Manage: Learning Pricing Rules	Secures the Create Worker Pricing Rule and Create Extended Enterprise Learner Pricing Rule tasks. You don't need access to this domain to add pricing rules to a course.
Reporting: Learning Pricing	Secures report data sources needed to create custom reports for pricing and pricing records. This domain is for users who need to report on prices, but not configure them. Note: Contextual security applies to learning enrollment pricing records so that managers and affiliation managers can only view records for learners who are in their organization at the time of enrollment. Administrators can view all records.

Business Processes

Business Process	Considerations
Enroll in Content	You must edit the business process definition to allow active workers and Extended Enterprise learners to purchase content. You can configure a step so managers or affiliation managers can approve enrollment prices.
Manage Course	You can configure a step so pricing administrators can approve course prices.
Manage Course Offering	You can configure a step so pricing administrators can approve course offering prices.
Mass Enroll	You can configure a step so managers, affiliation managers, or pricing administrators can approve enrollment prices for each learner.

Reporting

You can create custom reports with the:

- Learning Contents report data source to view pricing by course.
- Learning Enrollments report data source to view pricing records by enrollment.

Integrations

You can use these web services to configure pricing:

- *Get Training Credit Mappings*
- *Get Learning Organization Payment Configuration*
- *Get Learner Pricing Rules*
- *Put Training Credit Mapping*
- *Put Learning Organization Payment Configuration*
- *Put Learner Pricing Rule*

- *Manage Course Offering*
- *Manage Learning Course*

You can use these web services to enable e-commerce in courses and course offerings:

- *Get Learning Blended Courses*
- *Get Learning Courses*
- *Get Learning Course Offerings*
- *Get Learning Digital Courses*
- *Manage Course Offering*
- *Manage Learning Course*
- *Put Learning Blended Courses*
- *Put Learning Course Offering*
- *Put Learning Digital Course*

You can also use the *Get Learning Pricing Records* web service to send enrollment pricing records to other third-party applications. The only way to change the Document Payment Status field from *Unpaid* is with the *Put Learning Pricing Record Document Payment Status*.

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 Pricing for Learning

Prerequisites

Set up Learning or Extended Enterprise Learning.

Context

You can configure pricing and price display options for internal and external learners.

Steps

1. Edit Domain Security Policies.

   Configure security policies for these domains:

   - *Manage: Learning Pricing*
   - *Manage: Learning Pricing Rules*
   - *Reporting: Learning Pricing*
2. Access the Edit Tenant Setup - HCM task.

   Use these prompts on the Learning section to select who you can configure pricing for, and when new training credit to currency mappings become effective:

   - Enable Pricing Configuration for Person Types.
   - (Optional) Time Zone for Training Credit Mappings.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.
3. Access the Maintain Training Credit Mappings task.

   Specify the value of 1 training credit in each currency you want to configure pricing for.

   Security: *Manage: Learning Pricing* domain in the Learning Core functional area.
4. Create Learning Organization Payment Configurations on page 1934.

5. (Optional) Create condition rules for pricing.

   You can access these tasks to create condition rules that change the default price of courses for groups of learners:

   - Create Extended Enterprise Learner Pricing Rule.
   - Create Worker Pricing Rule.

   Security: *Manage: Learning Pricing Rules* in the Learning Core functional area.
6. Create Learning Courses on page 1986.

   Enter the default price for the course in the Price (Training Credits) field, and select the Enable Pricing check box. You can optionally use the Advanced Pricing Rules grid to apply any pricing rules you've created.
7. (Optional) Edit Business Processes.

   Update these business process definitions to include approval steps for pricing:

   - *Enroll in Content*
   - *Manage Course*
   - *Manage Course Offering*
   - *Mass Enroll*

   Examples: Managers or affiliation managers can approve enrollments. Pricing administrators can approve pricing changes to courses.

Result

Workday applies pricing settings to courses. After a learner enrolls in a course, Workday:

- Creates an enrollment pricing record.
- No longer displays the pricing details on the course.

Next Steps

Create a custom report using:

- The Learning Contents report data source to view pricing configurations for courses.
- The Learning Enrollments report data source to view pricing records for enrollments.

Set up and configure E-Commerce for Learning.

Related Information

Concepts

Setup Considerations: Pricing on page 1927

Tasks

Steps: Set Up E-Commerce for Learning on page 1932

Reference

Reference: Edit Tenant Setup - HCM

Steps: Set Up E-Commerce for Learning

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. To determine your subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *MSA*, you must enable this feature through Innovation Services.
- *UMSA*, you can skip the Opt in to E-Commerce for Learning through the Innovation Services Opt-In prerequisite step.

For more information, see this Community article.

- Set up Learning or Extended Enterprise Learning.
- Review Setup Considerations: Pricing on page 1927.
- Opt in to E-Commerce for Learning through the Innovation Services Opt-In task. Select E-Commerce for Learning service in the Learning category on the Available Services tab.
- Set up pricing. See: Steps: Set Up Pricing for Learning on page 1931.

Context

You can configure e-commerce capabilities in Workday Learning to allow active workers and Extended Enterprise learners to purchase learning content through Stripe, a third-party payment processor.

Steps

1. Edit Domain Security Policies.

   Configure the security policy for *Manage: E-Commerce for Learning* domain in the Learning Core functional area.
2. Access the Maintain E-Commerce for Learning task.

   Select Stripe as the Learning Content Payment Processor and use the Set up Stripe option to create an account ID and link it to your existing Stripe account, or create a new account.
3. Use the Onboard Stripe for Learning E-Commerce task to complete the onboarding process in Stripe.
4. (Optional) Access the Test Learning Content Payment Processor Connection task to verify the connection after setting up Stripe.
5. Create Learning Courses on page 1986.

   Enter a price for the course in the Price (Training Credits) field and select the Enable Pricing and Enable E-Commerce check boxes. Note: On digital courses also select the Requires Enrollment check box.
6. Edit Business Processes.

   Update the *Enroll in Content* business process definition to add the Require Learning E-Commerce Purchase service step and the Learning E-Commerce Purchase allowed action immediately after. This ensures Workday prompts learners to make a purchase before accessing the content. Note: Configure the security policy for *Employee as Self*, *Extended Enterprise Learner as Self*, and *Contingent Worker as Self*.

Result

Workday applies pricing settings to courses and course offerings. After enrolling, learners can purchase content by clicking the Purchase button, which redirects them to the payment processor website. Upon successful payment, learners can access the learning content.

Note: For inquiries about refunds, discounts, or receipts, please contact Stripe or refer to their documentation.

Related Information

Reference

2025R1 Feature Release Note: E-Commerce for Learning

Create Learning Organization Payment Configurations

Prerequisites

- Security: *Manage: Learning Pricing* domain in the Learning Core functional area.
- Enable pricing configuration for the *Worker* or *Extended Enterprise Learner* person type on the Edit Tenant Setup - HCM task.

Context

Configure the currency and price display options for supervisory organizations and extended enterprise affiliations. You can create a configuration for each organization or apply a configuration to subordinate learning organizations in a hierarchy for more simple setup.

Steps

Access the Create Learning Organization Payment Configuration task.

As you complete the task, consider:

Option	Description
Supervisory Organization	Select organizations to include in the payment configuration. This prompt only displays when you enable pricing for the *Worker* person type.
Extended Enterprise Affiliation	Select organizations to include in the payment configuration. This prompt only displays when you enable pricing for the *Extended Enterprise Learner* person type.
Include Subordinate Learning Organizations	Applies configuration options to subordinates of selected supervisory organizations and extended enterprise affiliations. Subordinate organizations that already have their own payment configuration retain their existing settings. If you remove an organization from a payment configuration that includes subordinates, its subordinates no longer inherit pricing settings.
Display Pricing In	Select a display option for prices.
Currency	Select a currency to use for organizations in this payment configuration. Workday doesn't consider the preferred currency settings of individual users when displaying prices.

Next Steps

- Create a custom report with the Learning Organization Payment Configurations data source to review which learning organizations belong to or inherit which learning organization payment configurations.
- Use the Move Learning Organization Payment Configuration task to move organizations from 1 learning organization payment configuration to another. To move an organization, the old and new learning organization payment configuration must have the same setting on the Include Subordinate Learning Organizations check box.

Related Information

Tasks

Create Custom Reports

Reference: Pricing Terminology for Learning

This table defines pricing concepts and terminology for Workday Learning and Extended Enterprise Learning:

Term	Description
Advanced Pricing Rule	A condition rule used to change the default Price (in Training Credits) on a course for a group of learners.
Document Payment Status	A report field on the Learning Enrollment Pricing Record business object that tracks the payment status of an enrollment. Workday automatically sets the status to *Unpaid*. You can update the status with the *Put Enrollment Pricing Record Document Payment Status* web service to reflect payments processed in third-party systems.
Learning Enrollment Pricing Record	Pricing data that Workday records with each course enrollment. Pricing records enable you to report on prices as Workday calculates them at the time of enrollment. The only element of this record you can edit is the Document Payment Status.
Learning Organization Payment Configuration	Specifies the currency and price display option for members of an extended enterprise affiliation or supervisory organization.
Training Credit	The standard currency used in exchange for consuming learning content. You can define: • How much a credit is worth in each currency. • How many credits each course or course offering is worth.
Training Credit Mappings	Specify the value of a single training credit in different currencies. Training credit mappings become effective on pacific time unless otherwise specified on the Edit Tenant Setup - HCM task.

Learner Experience

Setup Considerations: Learner Experience

You can use this topic to help make decisions when planning your configuration of the learner 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

You can provide tailored experiences for different learners based on their characteristics in Workday.

Business Benefits

- Configure different interfaces for different audiences in your organization, providing flexibility.
- Provide consistency for your audience by applying your brand to the Learning Home page.
- Make it easy for learners to identify required or relevant content.
- Create an engaging, more streamlined experience for learners to browse your catalog or complete their content.
- Improve learner interaction with learning paths sharing functionality.

Use Cases

- Configure separate banner images and header texts for specific audiences.
- Promote a task, report, or external content to your learners using spotlight cards.
- Add links to relevant content that learners can access on the panel menus.
- Highlight important updates by displaying announcements on the Home page.
- Target content for specific groups of users.
- Enable learners to share their learning paths with others.

Questions to Consider

Questions	Considerations
How do you want to display information to your learners?	Workday provides a default configuration including: • A side panel from which learners can return to their learning homepage, view links, the My Learning, and Discover pages. • Customizable banner image and welcome message. • Cards, called Spotlight Cards, that enable learners to see their current status in, and type of learning content. • The ability for learners to swipe to view required or recommended content. You can configure pages to display content that: • Is in progress, required, or of interest to a learner. • Develops learner skills or competencies, or is of interest to the learner. • Required. You can also: • Add menu items for tasks, reports, or external content in the links section of the side panel.

Questions	Considerations
	• Create spotlight cards that display that you can use to highlight tasks, reports, or both to a Learner. • Display required content dynamically. Three or more items of content display from left to right this view. Fewer than 3 items of content display vertically.
Which content do you want to call attention to?	To make content more visible and easier to access, you can add links to content, custom reports, or tasks on: • The links section of the main navigation menu. • Spotlight cards that display on the learning homepage. • Highlights that you add to your page, which learners can use to swipe through the content.
How do you want to configure the experience for different learners?	You can use segmented security to configure different learner experiences for different types of workers. Examples: • All employees. • Contingent workers. • External learners. • Managers. • Pre-hires. You can structure your required content to display sequentially on the page when you want your learners to complete courses in a certain order. Spotlight cards and links only display to learners who have access to the tasks or reports that you add.
How do you want your learners to browse your learning catalog?	You can configure a spotlight card that you link to your learning content report. Learners can then browse your catalog to find content that is relevant to their interests. Learners can also use the Discover page to help them develop their skills or competencies or just find content of interest. You can also enable language preferences so learners receive learning recommendations in their preferred languages.

Recommendations

Add these to your My Learning page to provide your learners with the best experience:

- Continue Learning.
- Required Learning.

Provide more relevant content recommendations for learners by enabling machine learning on:

- Based on Your Skills to Develop.

- Recommended for You.
- Suggestions for You.

To maximize performance, reduce the number of security groups.

Requirements

You must opt in to access the tasks to configure the learner experience interface. You can opt out at any stage.

Limitations

Workday provides a default configuration to ensure a consistent experience for your learners. You can't configure:

- The interface on which learners consume content.
- The top 3 menu items on the side panel.
- More than 3 spotlight cards per page.
- More than 3 custom sliders per page.
- More than 5 announcements on the Home page.
- More than 120 characters in spotlight card subtitles.

To provide a streamlined experience, you can only add 3 or fewer of these Workday-delivered spotlight cards to your Learning Home and My Learning pages:

- Create Lesson.
- Drop Enrollment.
- Edit Lesson.
- Edit Preferences.
- View Learning Transcript.

You can only add:

- Continue Learning to the Home and My Learning pages.
- Highlights to the Home page.
- Most Popular, Popular in Your Role, or Recently Added to the Home and Discover pages.
- Required for You to the Home and My Learning pages.
- Saved for Later and Learning Paths to the My Learning page.

You can only translate your spotlight cards into French, Italian, Portuguese, and Spanish.

Tenant Setup

Use the Edit Tenant Setup - HCM task to configure tenant-wide options for:

- Course and lesson rating. Workday suggests content with high ratings to learners.
- Packaged content. Example: SCORM digital courses.
- Learning paths.
- Language preferences for learning recommendations.

Security

Configure these domains in the Learning Core functional area:

Domains	Considerations
Learning Access	Enables users to: • View content information.

Domains	Considerations
	• View content progress.
Manage: Share Learning Paths	Enable users to share their learning paths with others.
Set Up: Tenant Setup - Worklets *Set Up: Learner Experience*	Users with access to these domains can configure the learner interface.

Business Processes

No impacts.

Reporting

Reports or Dashboards	Considerations
Browse Learning Content report	Add this report, or your custom version, to spotlight cards that enable learners to browse your learning catalog. Learners can use the *External Content Type* facet on this report to filter external content if they've configured Skillsoft Percipio in their tenant.
My Library dashboard	Enables learners to manage their learning paths and create a personalized curriculum from the learning catalog.

Integrations

Web Services	Considerations
Get Learning Navigation Items *Put Learning Navigation Item*	Use to view or add links to relevant content.
Get Learning Page Items *Put Learning Page Item*	Use to view or add content items to your pages.
Get Spotlight Cards *Put Spotlight Cards*	Use to view your current configuration, or load spotlight cards into Workday.

Connections and Touchpoints

Touchpoints	Considerations
Learning Content	Learners can view courses and lessons you create on their Learning interface.
Opportunity Graph	Learners can identify courses ranked most highly by workers in positions on their Opportunity Graph.
Talent	You can use the survey functionality from Talent as a lesson type to get feedback on the usability of your learner interface.

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: Learning on page 1871

Setup Considerations: Learning Content on page 1947

Tasks

Steps: Maintain Access to Learning Content on page 1914

Reference

2021R2 What's New Post: Learning Paths and Sharing

Steps: Set Up Learner Experience

Prerequisites

- Review Setup Considerations for Learner Experience.
- Save Searches for any reports you would like to use for custom sliders.

Context

You can use the Workday-delivered configuration or configure a customized learner experience so learners can access, complete, or view content using:

- Custom links that learners can use to access tasks, custom reports, or external content.
- Spotlight cards that highlight specific content for groups of learners.
- Custom sliders that enable learners to access personalized learning content.

Steps

1. (Optional) Configure Branding for Learning on page 1941.

   Configure your own banner image and header text for the Learning Home page.
2. (Optional) Configure Learning Spotlight Cards on page 1942.

   Create spotlight cards that direct learners to specific content. Example: A custom report from which they can browse your learning catalog to find content that helps them develop new skills.
3. (Optional) Steps: Set Up Learning Paths on page 1943.

   Enable learners to create and share personalized learning paths.
4. (Optional) Access the Create Learning Custom Slider task.

   Select the saved search that you want to use to display personalized content to learners on Workday Learning homepages.

   You can use these data sources when creating search reports for custom sliders:

   - Learning Assignment
   - Learning Content
   - Learning Enrollment
   - Learning Record

   Security:

   - *Set Up: Learner Experience* domain in the Learning Core functional area.
   - *Set Up: Tenant Setup – Worklets* domain in the System functional area.
5. (Optional) Add Home and Dashboard Announcements

   Use the Configure Announcements task to display up to 5 announcements on the Learning Home page.

6. Access the Maintain Learner Experience task.

   Select Customized Configuration on the tab for the page that you want to configure.

   As you add rows, consider:

Option	Description
Page Content	Select a card that Workday displays to your learners. You can select the order in which your content items display. You can add up to 3 custom sliders to these pages: • Learning Home • My Learning • Discover To add a slider, select Custom Sliders and then select the slider you want to display on the page.
Condition Rule	Add condition rules to specify who can view external links. Example: Add a condition rule display an external link to managers.
Task/ Report or External Link	Add a link that displays on the side panel on the Learning Home page.
Required for Groups	Select the groups that you want to display the custom slider to.

7. (Optional) Set Up Language Preferences for Learning Recommendations on page 1945.

   Enable learners to set their language preferences for the content that appears in learning recommendations.
8. (Optional) You can select Default Configuration to return to the Workday-delivered configuration.

   Security: *Set Up: Learner Experience* domain in the Learning Core functional area.

Next Steps

To view or change custom sliders, access the:

- Edit Learning Custom Slider task.
- View Learning Custom Slider report.

Related Information

Reference

Reference: Learning Content Organization on page 1902

Reference: Workday-Delivered Reports for Learning on page 2102

2021R2 What's New Post: Learning Paths and Sharing

2022R1 What's New Post: Custom Learning Sliders

Examples

Example: Create a Custom Report to Save Searches for Custom Learning Sliders on page 1946

Configure Branding for Learning

Prerequisites

- Select file types to upload to Workday on the Edit Tenant Setup - System task in the System Setup section.

- Create condition rules to configure branding for different users on the Create Branding Rule task.
- Security: *Set Up: Tenant Setup - System* domain in the System functional area.

Context

You can personalize Workday Learning by adding your own banner image and header text to the Learning Home page.

Steps

1. Access the Configure Tenant Branding task.
2. Click Other tab to add the banner image and the header text to the Learning Home page.
3. As you complete the task, consider:

Option	Description
Branding Rule	Add condition rules and apply 1 to each banner. For example, you can define 1 banner image for managers and other for external learners. When you don't create condition rules, Workday displays the same banner image and header text for all users.
Branding Image	The recommended banner size is 1440 x 193. To comply with Web Content Accessibility Guidelines AA (WCAGAA) standards, avoid placing text over the banner image. When you don't add a branding image, Workday displays the header text without a banner.
Branding Text	When you don't specify branding text, Workday displays this default text: *What will I learn today?*

Configure Learning Spotlight Cards

Prerequisites

Security: These domains in the Learning Core functional area:

- *Set Up: Tenant Setup - Worklets*
- *Set Up: Learner Experience*

Context

You can configure spotlight cards to highlight specific tasks, reports, or external content to your learners. You can configure different spotlight cards to deliver information to specific groups of learners. You can't currently make spotlight cards inactive once you've configured them.

Steps

1. Access the Manage Learning Spotlight Cards report.
2. Edit or view your spotlight cards in the Custom Cards area.

3. Configure the Workday delivered cards in the Delivered Cards area. Example: Configure the Browse Learning Catalog spotlight card to link to your custom report to enable your learners to find content of interest.
4. As you complete the task, consider:

Option	Description
Save As	Enter an identifier for the name with the *Put Spotlight Cards* web service to load the card into Workday
Title	Enter the text to display the spotlight card name to your learners.
Subtitle	Enter a description of fewer than 120 characters that describes the spotlight card.
Button Label	Displays to the learners on the spotlight card, enter an intuitive label. Example: Add 'Open Video' when you link to an external video.

5. (Optional) From the related action menu of your spotlight card, select Translation > Translate Instance.

   Select the language into which you want to translate the name, title, and subtitle of your spotlight cards. Currently you can select from French, Spanish, Italian, and Portugese.

Next Steps

- Add spotlight cards to your learner experience.
- Use the Edit Learning Spotlight Card task to edit your spotlight cards.

See: Setup Considerations: Learner Experience on page 1935.

Related Information

Reference

Reference: Learning Content Organization on page 1902
Reference: Workday-Delivered Reports for Learning on page 2102

Steps: Set Up Learning Paths

Prerequisites

Review setup considerations for Learner Experience.

Context

You can set up learning paths and path sharing functionality to enable learners to:

- Create their own personalized curriculum from the learning catalog.
- View and save paths that others have shared with them.
- Manage privacy settings to enable others to view and share their paths.

Steps

1. Access the Edit Tenant Setup - HCM task.

   Select the Enable Learning Paths option to enable learners to add content to learning paths.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

2. (Optional) Access the Maintain Learner Experience task.

   Add these sliders to your My Learning page:

   - Saved for Later
   - Learning Paths

   Security:

   - *Set Up: Tenant Setup - Worklets* domain in the System functional area.
   - *Set Up: Learner Experience* domain in the Learning Core Functional area.
3. (Optional) Edit Domain Security Policies.

   Provide users with view and modify access to the *Manage: Share Learning Paths* domain in the Learning Core functional area to enable them to use the paths sharing functionality.
4. (Optional) Access the Maintain Dashboards task.

   To enable learning paths on mobile, add these sliders to the My Library dashboard:

   - Saved for Later
   - Learning Paths Created by You
   - Learning Paths Saved by You

   Security: *Set Up: Tenant Setup - Worklets* domain in the System functional area.

Result

Learners can create, edit, and share their personalized learning paths. They can also use My Library report to see the learning paths they created or saved.

To add content to a learning path, learners can navigate to the stand-alone lesson or course of interest and click the Save option.

Related Information

Reference

2021R2 What's New Post: Learning Paths and Sharing

Available Innovation Services – Service Descriptions and Exhibits

Set Up Learning for Career Hub Plan

Prerequisites

- Set up Career Hub.
- Set up learning paths.

Security:

- *Learning Access* domain in the Learning Core functional area.
- *Self-Service: Career Hub* domain in the Career Hub functional area.
- *Set Up: Learner Experience* domain in the Learning Core Functional area.
- *Set Up: Tenant Setup - Worklets* domain in the System functional area.

Context

Workers can save learning suggestions to their Career Hub Plan. You can configure Workday to display sliders on the Learning Home page that contain learning items in a worker's Career Hub Plan and learning suggestions to help grow their career.

Steps

1. Access the Maintain Learner Experience task.
2. On the Learning Home tab, select the Customized Configuration option.

3. Add a new row and select the Grow Your Career slider from the Page Content options.
4. On the My Learning tab, select the Customized Configuration option.
5. Add a new row and select the Learning Items in Your Career Hub Plan slider from the Page Content options.

   Note: You must configure both the Grow Your Career slider and the Learning Items in Your Career Hub Plan slider. If you only configure 1 of the sliders, it won't display. The Learning Items In Your Career Hub Plan slider only displays once learning content is added to the worker's career plan.

Next Steps

Users can browse courses in Learning and add learning content using the Add to Career Hub Plan related action. If the user hasn't completed their Career Hub profile, a message will prompt them to complete the process.

Related Information

Tasks

Steps: Set Up Career Hub on page 1549

Steps: Set Up Learning Paths on page 1943

Reference

2023R1 What's New Post: Learning in Career Hub Plan

Set Up Language Preferences for Learning Recommendations

Prerequisites

- Review Setup Considerations for Learner Experience.
- Ensure all learning content has at least 1 language assigned in the language field. You can use the *Manage Learning Course* web service for bulk updates.
- Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

Context

You can configure Workday Learning to allow learners to set their language preferences for the content displayed in learning recommendations.

Steps

1. (Optional) Access the Configure Optional Fields task to make the Language field required in learning content. See: Hide or Require Optional Fields.
2. Access the Edit Tenant Setup - HCM task.

   In the Learning section, select the Enable Language Preferences check box.

Result

After learners specify their preferred languages in the Learning Preferences task, Workday displays learning recommendations in those languages within:

- Career Hub
- Manager Insights Hub
- Opportunity Graph

- These Learning sliders:
    - Based on Your Interests
    - Based on Your Skills to Develop
    - Grow Your Career
    - Most Popular
    - Popular in Your Role
    - Recently Added
    - Recommended for You
    - You Might Also Be Interested in

Note: When no content is available in a learner's preferred language, Workday doesn't display the corresponding slider. Example: If a learner selects German as their preferred language but no learning content is tagged with German, no recommendations will appear.

These worklets don't take into consideration the learner's preferred language:

- Continue Learning
- Required for You
- Highlights
- Learning paths
- Custom sliders

Related Information

Concepts

Setup Considerations: Learner Experience on page 1935

Reference

2025R1 Feature Release Note: Learning Recommendations in Preferred Language

Example: Create a Custom Report to Save Searches for Custom Learning Sliders

This example illustrates how to create a custom report to save searches for custom learning sliders. You can also use a saved search to create custom learning sliders.

Context

You can create custom sliders to display personalized learning content based on saved searches. You want to create a custom report using the Learning Content data source to save searches.

Steps

1. Access the Create Custom Report task.
2. Enter Custom Slider Learning Content in the Report Name field.
3. Select Advanced from the Report Type prompt.
4. Select Learning Content from the Report Data Source prompt.
5. Click OK.
6. Under the Additional Info section, access the Columns tab.
7. Select the Learning Content field on the Field column.
8. Access the Share tab.
9. Select Share with all authorized users for the Report Definition Sharing Options field.
10. Access the Advanced tab.

11. Under the Facet Options section, add, at least, 1 of your preferred facet filters.

    Example:

    - Access Type
    - Certification
    - Content Provider
    - Course Offering Instructors
    - Created by Worker
    - Learning Unit Type
    - Skill Level
12. Click OK.
13. Click Run.
14. Select the check boxes of the filters that you want to save.
15. Click the Save button.
16. Enter a Name for your saved search.
17. Click OK.

Next Steps

Access the Create Learning Custom Slider task.

Related Information
Tasks
Save Searches
Steps: Set Up Learner Experience on page 1940

Learning Content

Setup Considerations: Learning Content

You can use this topic to help make decisions when planning your configuration and use of learning content. 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

With Workday Learning, you can create content, such as courses, lessons, and programs, to add to a learning catalog for your organization.

Business Benefits

- Associate content with certifications so that you can reward learners for successfully completing learning content.
- Associate learning content with competencies when you create or edit a course or program so that users can search for content by competencies.
- Ensure that learning content meets requirements before publication by adding approval steps to the business processes.

- Gain insights on content in your learning catalog by creating a discovery board.
- Increase efficiency of catalog maintenance by enabling subject matter experts to create their own content.
- Increase flexibility and improve the user experience by blending internal and external learning content.
- Make it easier to educate and ensure compliance in your organization.
- Provide an interactive learning environment by enabling employees to personalize their content, such as content on performance goals.
- Simplify searches by grouping topics in your catalog according to specific skills, such as HR and Product Management.

Use Cases

- Create and issue certifications to learners based on their completion of associated learning content.
- Create courses that instructors deliver in person, have digital content, or a combination of both.
- Curate project management content to build project design skills and expertise.
- Enable your learners to provide feedback through questionnaires or ratings.
- Deliver a mandatory Health and Safety course to a group of first responders.
- Include third-party external content, such as Skillsoft or YouTube videos, in your courses, lessons, and programs.
- Set a deadline for an online Security Training course that all employees must complete.
- Tag media as sensitive so that users outside your organization can't view it.
- Notify managers and HR Business Partners when learning content is assigned to full-time workers in your organization. This functionality doesn't support extended enterprise learners.
- Create version schemas and add them to blended courses in your learning catalog, so that you can version your content consistently.

Questions to Consider

Question	Consideration
What type of content do you need to create for your organization?	You can create and mix these content types: • Blended courses: A combination of digital content and 1 or more scheduled, instructor-led lessons. • Digital courses: A combination of digital content items that don't include a scheduled, instructor-led lesson. • Stand-alone lessons: A single piece of content such as a recorded lecture or a job aid. • Programs: A combination of courses and lessons.
What content items do you need to include in your learning courses?	Both blended and digital courses can include any combination of these items, depending on the needs of your organization: • Documents, such as course guides, activity guides, and job aids. • External materials and links. • Images and diagrams. • Learning activities.

Question	Consideration
	• Presentations, videos, simulations, and recorded webinars. • Quizzes, knowledge checks, surveys, and exams.
Do you have existing media content that you need to load from external systems?	Workday handles any element that isn't an external link or survey as media content. Example: Documents, recorded webinars, software simulations, tests, quizzes, and videos. Cloud Connect for Learning and Public Learning Content enable you to import third-party media content. Workers can also access external content by search or through links as a recommended course. You can import media into Workday using: • The Workday Learning interface to load documents or graphics to an existing course or lesson. • Media importer or web services to bulk load external learning content. • Skillsoft to add new content and update existing course materials.
Do you want to monitor content creation?	All users can create content but you can monitor its creation by adding approval steps to ensure that content meets specified requirements before publication.
How do you want to manage your learning content?	You can create assessors and instructors to plan schedules and assess learners. You can assign them to content depending on the lesson type: • Assessors: You can create and assign multiple assessors for each enrollment in course offerings with training activity lessons. • Instructors: You can create internal instructors from workers already in your tenant and external, third-party instructors for courses and lessons. You can also assign subject matter experts as instructors for specific lessons.
Who do you want to access your learning content?	You can use segmented security to provide access to learning content and control the ability to edit it. Examples of segmented security groups are: • All employees. • Contingent workers. • External learners. • Managers. • Pre-hires.

Question	Consideration
	You can also suggest equivalent courses for workers when they can't access their desired course.
Do you want to receive learner feedback on the quality of your learning content?	You can configure your tenant to enable learners to rate their learning content. When you enable ratings, learners can rate their completed courses and programs, including SCORM. They can also rate standalone lessons in the learning catalog at any stage of their enrollment.

Recommendations

- Configure segmented security so that topics inherit or override their catalog's default security if you've created multiple learning catalogs for your organization.
- We recommend that you’ve fewer than 250,000 courses in your learning catalog. This number doesn't include imported records or content.
- Workday associates each topic in your learning catalog with an image. You can use any image that meets your company requirements.
- Use a total pixel size of 1,427 x 803 for your images. You might have to crop your image if it exceeds the recommended parameters.
- Use an image aspect ratio of 16:9 (in case of 1,366 x 768), and 4:3 (in case of 1,024 x 768).

Requirements

Create a topic before you can build learning content. Topics group your content so that learners can find it in the learning catalog.

Limitations

- Inactive external content is only removed from the *Browse Learning Content* report after the weekly maintenance window on Saturday is complete.
- Workday can't track external materials. You can't set lessons with external materials as required learning because you can't know their completion status.
- You can apply a single security segment to either learning catalogs or learning topics, but not both.
- You can only add 1 piece of learning content per learning certification rule.
- You can only display courses as a comma-separated list in your email notifications.
- You can't include surveys in a course until you activate them. You can activate a survey by creating a link for it, enabling it to function as a lesson within a course.
- You can't select media items from Drive when using Mobile.

Tenant Setup

Use the Edit Tenant Setup - HCM task to configure these tenant-wide options for your learning content:

Option	Description
Enable Express Interest	Enables users to express interest in courses when no suitable offerings are available to them in a specified location and date range.
Enable Learning Paths	Enables learners to add content to learning paths.
Enable Pricing Configuration for Person Types	Enables pricing configuration for workers and Extended Enterprise learners. Once you enable it for at least 1 person type, you can configure:

Option	Description
	• Learning organization payment configurations. • Prices for individual courses and course offerings. • Pricing rules. • Training credit mappings.
Enable Security Categories	Enables you to restrict access by security category segment.
Enable Packaged Content	Enables you to upload packaged media content in course lessons.
Enable Packaged Content Interaction Reporting	Enables you to report on learner responses in courses that contain media lessons with packaged content. This setting applies to interaction response data for new completions of future packaged content.
Enable Packaged Content on Mobile	Enables users to view packaged content for learning lessons on: • Android. • iOS.
Enable Rating on Courses and Learning Content	Enables users to rate content that they're enrolled in and any stand-alone lessons in the learning catalog.

Security

Domain	Consideration
Learning Access domain in the Learning Core functional area	Enables users to: • Complete learning content. • Set preferences. • View content information. • View content progress.
Manage: Learning Content in the Learning Core functional area	Enables you to access learning content management tasks and reports.
Set Up: Learning Catalog in the Learning Core functional area	Enables you to access the learning catalog for administrative reports and tasks.
Manage: Media Import in the Backpack Hub Service functional area	Enables you to import large volumes of video and packaged content media files. This domain is only available when you enable Media Cloud in your tenant.
Manage: Media Settings in the Backpack Hub Service functional area	Enables you to access and manage settings for media content.
Create and Manage Surveys in the System functional area	Enables you to create, edit, copy, view, launch, close, and cancel surveys.

Domain	Consideration
Manage Surveys in the System functional area	Enables you to create, edit, copy, view, launch, close, and cancel surveys.
Self-Service: Learning Assessor in the these functional areas: • Extended Enterprise for Learning • Learning Core	Enables external learning assessors to view their profiles.
Self-Service: Take Surveys in the System functional area	Enables users to access Workday survey lessons.

Business Processes

Business Process	Consideration
Cancel Course Offering	Enables you to create condition rules and custom notifications.
Edit Course Additional Data *Edit Program Additional Data*	Enables you to select security groups to approve the addition of custom fields to learning content.
Enroll in Content	Enables you to create condition rules and custom notifications using report fields for learning content on the Learning Enrollment Event business object. Example: Learners can drop on-demand courses without manager approval, unless they're required learning (either campaigned or manager-enrolled courses).
Manage Course *Manage Lesson* *Manage Program*	Enables you to add approval steps to ensure that content meet requirements before publication when workers: • Create learning content. • Edit learning content. • Manage learning content versions.
Manage Course Offering	Enables you to configure the business process security policy to enable learning administrators or instructors to move instructor-led classroom training online in course offerings.
Manage External Learning Assessor *Manage Internal Learning Assessor*	Enables you to create and edit internal and external learning assessors.
Manage External Learning Instructor *Manage Internal Learning Instructor*	Enables you to create and edit internal and external instructors.
Mass Enroll	Enables managers to enroll their teams in a course.
Waitlist in Course	Enables learners to join a waitlist until a seat is available.

Reporting

Report or Dashboard	Description
Translate Business Object	Create translated titles and descriptions for learning content.
Courses and Lessons Created (Last 12 Months)	Monitor the amount of content that users create per month.
Learning Admin dashboard	Provide an administrative view of learning content with access to: • Learner self-service tasks. • Manage reports that enable you to maintain the learning catalog and provide insight into the value and effectiveness of training.
Learning Content by Rating	Use this report to identify the: • Highest-performing content. • Performance for learning courses and stand-alone lessons.
Learner Engagement	Evaluate enrollments and completions, so you can examine why some learners engage more than others. The report only displays data for the last complete month.
Learning Trainer dashboard	Enable trainers to: • Find workers to enroll in courses. • Manage grading and attendance. • Manage training activities. • Manage waitlists. • View schedules for lessons that they're teaching.
My Library dashboard	Enable learners to manage their learning paths and create a personalized curriculum from the learning catalog.

You can use the Learning Contentreport data source in custom reports to track learning content data for your organization.

Integrations

Web Service	Consideration
Edit Learning Course Additional Data *Edit Learning Course Offering Additional Data* *Edit Learning Program Additional Data*	Enables you to update effective-dated custom fields for learning content.
Enroll in Learning Content	Enables you to enroll learners into learning content. Respects due dates that you set when you mass enroll learners using this web service.

Web Service	Consideration
Manage External Learning Instructor *Manage Internal Learning Instructor*	Enables you to create internal instructors from workers inside your tenant and external instructors.
Manage Equivalency Rule	Enables you to create or update equivalency rules.
Manage Learning Course *Manage Lesson* *Manage Learning Program*	Enables you to create or update learning content types. Use the Legacy check box on the *Manage Learning Course* web service to enable a course to display as a legacy course on reports and identify when it uploads as a legacy course. This check box is noneffective dated. If you uncheck it in the future, all versions of the course will be unchecked.
Manage Learning Prerequisite Rule	Enables you to create or update prerequisite rules.
Manage External Learning Assessor *Manage Internal Learning Assessor*	Enables you to create or update external and internal learning assessors.
Put Learning Content Subscription	Enables you to create or update subscriptions for learning content.
Put Learning Imported Content *Put Learning Imported Record*	Enables you to bulk load existing content or enrollments into Workday.
Put Learning Other Unit Types	Enables you to create or update other unit types for digital and blended courses.
Put Learning Topic	Enables you to create or update learning topics.
Put Media Settings	Enables you to update the Restrict Access check box setting for a specific media item.

Workday also supports integrations with third-party media content providers, including:

- Coursera
- Go1
- Harvard ManageMentor®
- LinkedIn Learning™
- OpenSesame
- Pluralsight
- Skillsoft Percipio
- Udemy Business
- YouTube

Connections and Touchpoints

Touchpoint	Consideration
Career and Development Planning	Workday Learning helps learners identify courses ranked highest by workers in their positions on their Opportunity Graph.

Touchpoint	Consideration
Onboarding	You can create required learning campaigns to display learning content on the Required for You worklet on the Onboarding dashboard.
Talent	You can: • Use the survey functionality from Talent as a lesson type within a course. Surveys enable you to get feedback on the course, that you can use to improve your learning content. • Use Talent Marketplace to suggest learning content to help close skills gaps. • View the learning content you completed to achieve a competency, and suggestions for other content. • View recommended learning content that's relevant to skills that you want to develop or improve. • Import exact and synonymous skills from Skillsoft Percipio and Udemy Business. When external skills match a Skills Cloud skill in your tenant, Workday attaches them to the imported content and displays them in areas such as recommendations, search facets, course details, and worker profiles. Note: Workday Learning doesn't support importing of external content with more than 25 skills.

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: Learning Topics on page 1901
Concept: Opportunity Graph on page 1540
Setup Considerations: Talent Marketplace on page 1569

Tasks

Steps: Set Up Competencies on page 1969
Steps: Set Up Skills Cloud on page 1888
Enable Skills Cloud on page 1973
Set Up Onboarding Landing Page on page 757
Create Learning Courses on page 1986
Create Learning Course Offerings on page 1995
Create Learning Programs on page 2001
View and Edit Learning Content on page 2005
Configure External Content on page 2051
Manage Schedules and Grading and Attendance on page 2087
Maintain Learning Unit Types on page 1900
Steps: Set Up Cloud Connect for Learning Using Legacy Tasks on page 2043
Steps: Set Up Public Learning Content on page 2045

Reference

Reference: External Content Provider Configurations on page 2056

Examples

Troubleshooting: Configure Cloud Connect for Learning on page 2062

Available Innovation Services – Service Descriptions and Exhibits

2022R2 What's New Post: Cloud Connect for Learning: Content Import and Tracking for Coursera

2022R2 What's New Post: Cloud Connect for Learning: Content Import for Pluralsight

2022R1 What's New Post: Cloud Connect for Learning: Completion Tracking for LinkedIn Learning and Udemy

2022R2 What's New Post: Completion Tracking for Pluralsight in Cloud Connect for Learning

2023R1 What's New Post: OpenSesame Content Import and Tracking

Go1 Content Import and Tracking

https://community.workday.com/articles/413086

Setup Considerations: Learning Lessons

You can use this topic to help make decisions when planning your configuration and use of lessons. 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 Are They

Lessons are an item of learning content that users can access as a single unit or as part of a course. Examples:

- Course guide.
- Job aid.
- Movie.
- Recorded lecture.
- Software simulation.

Business Benefits

- Continuously improve your content by creating surveys to gather learner feedback.
- Encourage social learning by enabling users to personalize content and share expertise by easily uploading videos or other lesson content.
- Optimize distribution of educational and compliance content throughout your organization.
- Streamline catalog management by enabling subject matter experts to create and manage their own content.
- Target areas of your organization with audience-specific content.
- Facilitate compliance and record-keeping by providing a verifiable record of learner understanding for important content.

Use Cases

- Build lessons from scratch or using previously loaded media.
- Create lessons using content from Workday Learning or imported material, or a combination of both.
- Create media or instructor-led segments.

- Create single lessons for business tasks or combine multiple lessons to create a course.
- Define an approval process for new content to maintain a high standard of lesson content.
- Display featured or recommended content to learners.
- Host individual lessons in different locations over a specified time period.
- Include materials related to job-training activities. Example: A forklift driving demonstration and follow-up assessment.
- Require learners to take lessons for legal compliance training.
- Require learners to confirm that they have read and understood a policy, safety procedure, or other important content.

Questions to Consider

Question	Consideration
What content do you want to create for lessons?	You can create: • External content. Examples: Websites or video links. • Media. Examples: Documents or movies. • Surveys. • Acknowledgments.
Which lesson types do you want to add to blended and digital courses?	You can add these lesson types to blended courses: • Acknowledgment • External Content • In Person Classroom (Instructor Led) • Media • Survey • Training Activity • Virtual Classroom (Instructor Led) You can add these lesson types to digital courses: • Acknowledgment • External Content • Media • Survey
How do you want to manage locations for instructor-led lessons?	You can select different locations for each instructor-led lesson. Lesson locations can be anywhere your business has tagged as a training business site.
How do you want to manage expiration dates for lessons?	You can ensure the continuity of lessons by setting an end date on the current lesson that's the same as the start date of the new version.

Recommendations

- Enforce lesson order to ensure that mandatory lessons are taken in the correct sequence.
- To ensure that instructors can track attendance and enter grades at lesson level, assign them as both primary and lesson-level instructors.
- Upload an image to represent the subject matter of instructor-led lessons.

Requirements

You must create topics before you create lessons. Topics enable you to categorize learning content for ease of access.

Limitations

- Workday can't track external materials. You can't set lessons with external materials as required learning because you can't know their completion status.
- Workday doesn't support SCORM or AICC packaged content files for stand-alone lessons.
- Workday doesn't track lessons. To track progress for a single lesson, build a single-lesson course.
- You can't include Acknowledgment, External Content, Training Activity, or Surveys lesson types in stand-alone lessons.
- You can't assign a correct answer to a survey response. Workday Learning only uses surveys to gather feedback.
- You must launch a survey before you can add it as a lesson to a course.
- You need to access Workday on desktop to mark lessons complete.
- Content ratings can only be enabled or disabled for all content types in your tenant rather than individual lessons. Comment functionality is independent of content ratings.
- The enrollment status of every lesson needs to be complete to rate a course or a program, including SCORM.

Tenant Setup

Access the Edit Tenant Setup - HCM task to configure these tenant-wide options for lessons:

Option	Description
Enable Packaged Content	Enables you to upload packaged media content as lessons in a course.
Enable Packaged Content on Mobile	Enables users to view packaged content for learning lessons on: • Android. • iOS.
Enable Rating on Courses and Lessons	Enables users to rate lessons that they're enrolled in and stand-alone lessons in the learning catalog.

Security

Domain	Considerations
Learning Access domain in the Learning Core functional area.	Enables users to: • Complete lessons. • Set learning preferences. • View lesson information. • View lesson progress.
Create and Manage Surveys in the System functional area.	Enables users to create, edit, copy, view, launch, close, and cancel survey lessons.
Manage Surveys in the System functional area.	Enables users to create, edit, copy, view, launch, close, and cancel survey lessons.
Self-Service: Take Surveys in the System functional area.	Enables users to access Workday survey lessons.

Business Processes

Business Process	Description
Manage External Learning Assessor *Manage Internal Learning Assessor*	Enables you to create and edit internal and external learning assessors.
Manage External Learning Instructor *Manage Internal Learning Instructor*	Enables you to set up and manage internal instructors from workers already in your tenant and external, third-party instructors.
Manage Lesson	Enables you to create and edit of all types of lessons, including creating new versions of an existing lesson. You can add approval steps to ensure that lessons meet requirements before publication.

Reporting

Report or Dashboard	Description
Courses and Lessons Created (Last 12 Months)	Monitor the rate at which users create learning content. Example: Use this information to plan for which departments require more lessons.
Learning Content by Rating	Monitor the quality of your learning catalog through ratings-based groupings of lessons.
Learning Trainer	Enable trainers to: • Manage grading and attendance. • Manage training activity lessons. • Manage waitlists. • View schedules for lessons that they're teaching.

Integrations

Web Service	Consideration
Manage External Learning Instructor *Manage Internal Learning Instructor*	Enables you to designate external third-party users as external instructors and workers as internal instructors.
Manage Lesson	Enables you to create or update stand-alone lessons.
Manage External Learning Assessor *Manage Internal Learning Assessor*	Enables you to create or update internal or external learning assessors.

Connections and Touchpoints

Touchpoint	Consideration
Onboarding	You can create required learning campaigns to display lessons on the Required for You worklet on the Onboarding dashboard.

Touchpoint	Consideration
Talent	You can use survey functionality from Talent as a lesson type within a course to get feedback so that you can improve your content.

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: Talent Marketplace on page 1569

Tasks

Configure External Content on page 2051

Reset Learning Due Dates on page 2091

../../staffing/onboarding/onboarding-landing-page/dan1370797176572.dita

Reference

2025R2 Feature Release Note: Acknowledgment Lesson Type

Setup Considerations: Learning Campaigns

Note: We plan to migrate Campaign functionality to Engagement Builder in a future release. Workday recommends that you start using Engagement Builder for greater efficiency and visibility into your engagements. See: ../../../manage-workday/collaboration/engagement-builder/setup-considerations-engagement-builder.dita.

You can use this topic to help make decisions when planning your configuration and use of Learning Campaigns 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

Leaning campaigns enable you to engage target audiences by promoting learning content and automatically sending notifications to learners.

Business Benefits

You can use learning campaigns to:

- Assign required content to help meet your organization's compliance needs.
- Improve efficiency by dynamically identifying specific groups of learners based on learner data.
- Ensure consistency in the delivery of learning content by defining schedules.
- Prominently display required learning content on the Learning dashboard.

Use Cases

- Assign a course about workplace safety to your entire department.
- Assign content to new hires.
- Assign a required leadership program to all the managers in your organization.
- Promote annual security policy training to your entire organization.

Questions to Consider

Question	Consideration
What content do you want to promote?	You can include 1 or more of these learning content items in your campaigns: • Courses • Lessons • Notifications • Programs • Surveys
How do you want to notify learners of content?	You can promote content to learners using: • Notifications. • The Required for You worklet. • Custom sliders on the Learning Dashboard. You can configure up to 3 reminders per campaign item. Workday removes campaign content from the Required For You slider after the campaign's end date, even if the learner hasn't completed the content. Workday doesn't send campaign content to learners that have previously completed the content, even if they completed the content outside of the campaign. Workday sends campaign reminders based on the recipient's timezone.
Which learners do you want to send your learning campaigns to?	You can create campaign audiences to assign and track learning content for specific audiences. You can configure dynamic updates to enable Workday to automatically: • Remove learners when they no longer meet the audience criteria. • Send the campaign to learners again if they dropped out of the audience prior to completion and rejoin. You can run campaigns based on your audience. When you have a set audience, you can select Run Now to run your campaign. When you have a dynamic audience that changes daily or weekly, you can select a daily or weekly recurrence. Example: New learners join or existing learners are removed regularly and you want to avoid selecting Run Now every time a new learner joins or leaves. Workday updates the audience size count the next time the campaign is launched.
How do you want to manage large volumes of campaigns?	You can save time by creating message templates to automatically populate information into new campaigns that you create.

Question	Consideration
When setting an end date on a campaign and the end date is the same as the due date by default, will reminders go out if you confgiure them for the due date?	If your due date is the same as your end date, the campaign will end at 12am based on your tenant timezone. Reminders configured on the due date won't trigger as the campaign has already ended. Part of the reminder requirements is that the campaign needs to be valid. In this case, we recommend configuring the reminder 1 day before the due date instead.

Recommendations

To avoid delayed notifications and other system processes, Workday recommends that you contact the Workday Production Readiness team to help you test and prepare for running large volume campaigns in Production. Examples of large volume campaigns include those with:

- Audience sizes of over 100,000 workers.
- Frequent dynamic audience additions of over 100,000 workers.
- Over 100 daily scheduled campaigns.

For an audience size of 100,000, Workday recommends a minimum campaign duration of 30 days.

If you have a campaign audience that exceeds 50,000 learners, use a saved search instead of a custom report to create your campaign audience. Results for custom reports are limited to 50,000.

If your campaign audience exceeds 100,000, break the audience into multiple campaigns.

Test your campaign configuration in your sandbox tenant. We recommend that you:

- Test different users to ensure that they receive the campaign.
- Run reports to ensure results are accurate.
- Ensure results are correct when identifying your target audience. Example: If there are 50 managers included in your custom report for the campaign audience, the campaign should be sent to 50 managers.

Requirements

- You must use the Worker data source when creating custom reports for learning campaigns.
- To use the Campaign Email Analytics by Item report, you must set up email analytics. See: Steps: Set Up Email Analytics.

Limitations

- You can’t rescind a campaign from individual learners; you have to rescind the entire campaign.
- If a learner completes a campaign and the campaign is relaunched, the learner will not receive the campaign again.
- You can't use copied custom versions of the Find Workers report to create saved searches for campaign audiences.
- You can't configure campaigns to automatically enroll a learner. Learners must manually enroll or begin the content when they receive a campaign item.

Tenant Setup

You can access the Notification Delivery Settings section of the Edit Tenant Setup - Notifications task to configure settings for learning notifications.

If you disable reminders on Edit Tenant Setup-Notifications, Workday queues the reminders and then sends queued reminders when they're enabled.

Security

Security	Description
Administer Campaigns in the System functional area.	Enables you to create, edit, and view campaigns.
Security segments: • *Extended Enterprise Campaigns* • *Learning Campaign*	Enables you to configure delivery settings for the Extended Enterpirse Campaigns or Learning Campaigns notification types for your security groups.

Business Processes

Configure the *Campaign Event* business process to perform these actions on campaigns:

- Approve
- Copy
- Create
- Edit
- Rescind
- Submit
- View

Reporting

Reports or Dashboards	Description
Business Process and Integration Notifications report	View the status of all notifications that are sent to learners.
Campaign Email Analytics by Item report	Identifies the campaign: • Click rate • Content type • Item delivered • Marked as spam rate • Name • Open rate • Received rate • Unsubscribe rate See: Steps: Set Up Email Analytics.
Campaign Status by Category report	Identifies the campaign category and status of the campaign. You can drill down to view learners and their status.Example: You can see that a learner's campaign category is Required and the status is In Progress.
Learning Campaign report	View learning campaigns from the previous 12 months on the Learning Admin dashboard.
Learning dashboard	Display learning campaign content prominently to learners.
View Campaign report	View a list of campaigns in the tenants.

Integrations

You can use these web services with campaigns:

- *Get Campaign Categories*
- *Get Connect Campaigns*
- *Put Campaign Category*
- *Submit Connect Campaign*

Connections and Touchpoints

Features	Considerations
Learning Assignments	Enables you to track campaigns and email analytics.
Recruiting Campaigns	You can create campaigns that enable recruiters to send branded marketing communications to pools of prospects or candidates.
Student Recruiting Campaigns	You can create a campaign for a student recruiting cycle.
Surveys	You can create campaigns that deliver surveys to target audiences.

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: Configure Google Calendar for Learning

Context

You can create calendar invites that automatically sync with course offering updates and enrollment events. The integration ensures that learners have the most current information in their calendars as they receive updated invites when the course offering changes. If the offering is cancelled; or the attendee drops or is dropped from the offering, they receive a cancellation email.

Workday doesn't retroactively add the calendar integration for existing course offerings. Additionally, Workday prevents you from downloading the iCalendar (.ics) file type for offerings scheduled after activating the feature.

The calendar integration only processes calendar events created in the same tenant type. Example: Events created for old course offerings in an Implementation tenant won't be picked up in your Production tenant. Workday recommends that you cancel any such course offerings in Production and create new offerings or copy the old offerings before enrolling learners.

Workday recommends caution when testing this feature in non-Production environments as learners will receive real emails.

Steps

1. Register the Learning Integration with Google.

   See Configure Google Cloud Platform for Learning Calendar Integration.
2. (Optional) Access the Create Integration System User task.

   Create an integration system user (ISU). We recommend using *Learning_Integrations_User* for the user name.

   Security: *Integration Security* domain in the Integration functional area.

3. Access the Edit Tenant Setup - HCM task.
    a) In the Learning section, select the Enable Calendar Integration check box.
    b) As you complete the Learning Calendar Integration section, consider:

Option	Description
Calendar Provider	Select *Google Calendar*.
Integration System User	Select the ISU you created.

    Security: *Set Up: Tenant Setup - HCM* in the System functional area.
4. Create Integration System Security Groups.

    As you complete the landing page, consider:

Option	Description
Type of Tenanted Security Group	Select *Integration Security Group (Constrained)* or *Integration Security Group (Unconstrained)*.
Name	We recommend using *Learning_Integrations_Group*.

    Assign your ISU to the integration system security group you create.
5. Maintain Security Group Permissions.

    Add the *Set Up: Learning External Content Integrations* domain to the Report/Task Permissions section with *View* and *Modify* access, and Integration Permissions section with *Put* access.
6. Activate Pending Security Policy Changes.
7. Access the Edit Tenant Set Up – HCM task.

    As you complete the Learning Calendar Integration section on the Parameters grid, consider:

Option	Description
Service Owners Key	Workday uses this text after you set up the project on Google Cloud Platform. Contact your IT department or Cloud administrator to set this up.
Mailbox	Enter the email address from which you want to generate the calendar invites. Ensure that this email address matches the address entered in Google Cloud Platform. We limit the number of emails you can generate in 24 hours to 10,000 internal emails and 3,000 external emails.
Restricted to Environment	When you select an environment, Workday prevents your Preview settings from overriding your Production settings when your Production tenant data is used to refresh your Preview tenant data.

8. Access the Manage Learning Calendar Message Templates task.

   Create and manage content for your classroom, virtual classroom, and cancellation message templates.

   - Workday enables you to configure message templates at tenant level and applies them to all email invites generated as a result of this integration.
   - The integration doesn't run until you configure message templates so that empty calendar invites don't go out to learners.
   - The integration doesn't utilize domain-wide delegation, ensuring that Workday doesn't have read and write access to all mailboxes in your tenant.

   Security: *Set Up: Learning Catalog* in the Learning Core functional area.

Result

- Instructors and enrolled attendees receive the same version of the invite. Attendees can't view other attendees on invites.
- Workday uses the learner's time zone to send invites and displays them correctly in their calendar.
- Workday sends email invites to learners with any email client.
- Workday limits attendees on a single invite to 500, and automatically creates another invite when you reach this limit. You can generate a maximum of 9,900 emails in 24 hours.

Next Steps

Access the Learning Calendar Integration Status report to view:

- Whether the integration is running at that moment. The integration is set to run every 15 minutes.
- The number of invites sent in the past 24 hours.
- The number of invites that ran in the past 24 hours.
- Related course offerings and lessons for any pending invites

You can only view this report when you enable Google Calendar integration for your tenant.

Related Information

Concepts

Concept: Calendar Message Templates on page 2018

Reference

2021R1 What's New Post: Outlook Calendar Integration for Learning

Steps: Configure Microsoft Outlook Calendar for Learning

Context

You can create calendar invites that automatically sync with course offering updates and enrollment events. The integration ensures that learners have the most current information in their calendars as they receive updated invites when the course offering changes. If the offering is cancelled, or the attendee drops or is dropped from the offering, they receive a cancellation email.

Workday doesn't retroactively add the calendar integration for existing course offerings. Additionally, Workday prevents you from downloading the iCalendar (.ics) file type for offerings scheduled after activating the feature.

The calendar integration only processes calendar events created in the same tenant type. Example: Events created for old course offerings in an Implementation tenant won't be picked up in your Production tenant. Workday recommends that you cancel any such course offerings in Production and create new offerings or copy the old offerings before enrolling learners.

Workday recommends caution when testing this feature in non-Production environments as learners will receive real email invites.

Note: To create calendar events, the integration needs ReadWrite access to a single mailbox defined in the tenant setup. Workday uses this to send calendar events to learners and instructors.

See Configure Application Access Policy and Limit Application Permissions to Specific Exchange Online Mailboxes to configure policy rules using Microsoft Powershell to restrict ReadWrite access to one mailbox.

Steps

1. Register the Learning integration with Microsoft Outlook.

   See Register Your Client-Side Application for Learning Calendar Integration with Microsoft Outlook.
2. (Optional) Access the Create Integration System User task.

   Create an integration system user (ISU). We recommend using *Learning_Integrations_User* for the user name.

   Security: *Integration Security* domain in the Integration functional area.
3. Access the Edit Tenant Setup - HCM task.
   a) In the Learning section, select the Enable Calendar Integration check box.
   b) As you complete the Learning Calendar Integration section, consider:

Option	Description
Calendar Provider	Select *Microsoft Outlook Calendar*.
Integration System User	Select the ISU you created.

   Security: *Set Up: Tenant Setup - HCM* in the System functional area.
4. Create Integration System Security Groups.

   As you complete the landing page, consider:

Option	Description
Type of Tenanted Security Group	Select *Integration Security Group (Constrained)* or *Integration Security Group (Unconstrained)*.
Name	We recommend using *Learning_Integrations_Group*.

   Assign your ISU to the integration system security group you create.
5. Activate Pending Security Policy Changes.
6. Access the Edit Tenant Set Up – HCM task.

   In the Learning section, enter values for these fields on the Parameter grid to customize your message templates. Consult with your IT department for these values:

   - *Client ID*
   - *Client Secret*
   - *Mailbox*
   - *Tenant ID*

   Workday masks the values that you enter for *Client ID* and *Client Secret* when you set up this integration for the first time. After set up, we don't display the full values to provide additional security for this sensitive information. We recommend that you set up a new mailbox to manage your invites as the mailbox might get busy.

7. Access the Manage Learning Calendar Message Templates task.

   Create and manage content for your classroom, virtual classroom, and cancellation message templates.

   - Workday enables you to configure message templates at tenant level and applies them to all email invites generated as a result of this integration.
   - The integration doesn't run until you configure message templates so that empty calendar invites don't go out to learners.

   Security: *Set Up: Learning Catalog* in the Learning Core functional area.

Result

- Instructors and enrolled attendees receive the same version of the invite. Attendees can't view other attendees on invites.
- Workday uses the learner's time zone to send invites and display them correctly in their calendar.
- Workday sends email invites to learners with any email client.
- Workday limits attendees on a single invite to 500, and automatically creates another invite when you reach this limit. You can generate a maximum of 9,900 emails in 24 hours.

Next Steps

Access the Learning Calendar Integration Status report to view:

- Whether the integration is running at that moment. The integration is set to run every 15 minutes.
- The number of invites sent in the past 24 hours.
- The number of invites that ran in the past 24 hours.
- Related course offerings and lessons for any pending invites

You can view this report only when you enable Microsoft Outlook Calendar integration for your tenant.

Related Information

Concepts

Concept: Calendar Message Templates on page 2018

Reference

The Next Level: Outlook Calendar Integration for Workday Learning Webinar

Reference: Microsoft Environments for Workday Learning on page 2026

Steps: Configure Translation Templates for Calendar Email Invites

Prerequisites

Configure Google or Microsoft Outlook calendar for your tenant.

See: Steps: Configure Google Calendar for Learning on page 1964 or Steps: Configure Microsoft Outlook Calendar for Learning on page 1966.

Context

You can create and send email translation templates in the specified language of a course offering, improving the user experience for employees around the world. To ensure that the integration implements the translation templates correctly, set only one language on your course offering.

Steps

1. Access the Edit Tenant Setup - HCM task.

   In the Learning section, select the Enable Message Translation Template check box.

2. Access the Manage Learning Calendar Message Templates task.

   On the Translations tab, click Translate Message Templates and select a user language.

   Workday enables you to set up these templates at tenant level and applies them to all email invites generated from this integration. We provide default messages for the Classroom, Virtual Classroom, and Cancellation templates. You can customize the templates to display specific information in the email subject and body.
3. Use the Instructor Led Offering business object to add dynamic fields.

   Select the Activated check box to ensure that translation templates send correctly.

Next Steps

- When you create a course offering, ensure that the Language field for the course offering matches the language for the translation template.
- Use the Translate Learning Calendar Template task to create additional translation templates.

Related Information

Reference

2021R1 What's New Post: Outlook Calendar Integration for Learning

Steps: Manage Learning Content

Context

The learning catalog comprises programs, blended and digital courses, course offerings for blended courses, and stand-alone lessons. You can create and maintain courses and course offerings to enable learner enrollment. Workday supports peer learning by enabling you and your employees to create stand-alone lessons, as an employee self-service task.

Steps

1. Access the Maintain Sales Item Groups task.

   Create a sales item group for items that relate to learning programs and course costs.

   Security: These domains in the Learning Core functional area:

   - *Set Up: Sale Item*
   - *View: Sale Item*
2. Access the Create Sales Item task.

   Create sales items that relate to program and course costs. Sales items include:

   - Catering.
   - Course materials.
   - Fees for instructors.
   - Room rental.

   You can add these sales items when you create or edit programs and courses. The total of all sales items on a program or course provides the overall cost. If there are no sales items, the learning content has no cost. Workday displays the Cost value on these reports so that learners can view the cost before they enroll:

   - View Learning Program
   - View Course

   Security: The Create Revenue Category task is secured to the *Set Up: Basic Revenue Category Worktag* domain.

   Provide both *View* and *Modify* access to the *Set Up: Basic Revenue Category Worktag* domain.

3. (Optional) Create skills to tag to your learning content.

   See Enable Skills Cloud on page 1854.
4. (Optional) Create competencies to add to your learning content.

   See Steps: Set Up Competencies on page 122.
5. Create Learning Courses on page 1986.
6. Create Learning Course Offerings on page 1995.
7. (Optional) Access the Create Lesson task.

   Create stand-alone lessons to add content such as videos and documents to your learning catalog as a single lesson. Ensure that you select a media type that Workday supports.

   Note: You can't add SCORM or AICC packaged media files to stand-alone lessons.

   See FAQ: Uploading and Viewing Videos.

   Security: These domains in the Learning Core functional area:

   - *Learning Access*
   - *Manage: Learning Content*
8. (Optional) Move Instructor-Led Classroom Training Online on page 2000.
9. (Optional) Create Learning Programs on page 2001.
10. View and Edit Learning Content on page 2005.
11. (Optional) Create Learning Equivalency Rules on page 2009.
12. (Optional) Create Learning Prerequisite Rules on page 2011.
13. (Optional) Configure External Content on page 2051.

    Enable learners to access content from third-party providers.
14. (Optional) Set up Learner Name for Packaged Content.

    Enable Workday to send a learner's name, ID, or both, to third-party packaged content providers.

    - Access the Edit Tenant Setup - HCM task.
    - In the Packaged Content section, select the Send Learner Name to Third-Content Provider check box.
15. (Optional) Share media items that you've uploaded to Workday with other learning administrators so they can also add the media to courses.

    a. Access Drive from the Workday main menu.
    b. Select the media file or folder that you want to share and click Share to configure permissions.

    Security: *Drive* domain in the System functional area.

    Only users with access to the *Drive* domain can access media that you share.
16. (Optional) Configure Learning Content Highlights Rules on page 2013.
17. (Optional) Translate Business Data.

    Configure translations for field values on these business objects in the *Learning: Learning – Course Management* category to support global learning:

    - *Course* (for course offerings)
    - *Instructor Led Lesson*
    - *Learning Course*
    - *Learning External Content Item*
    - *Learning Media Content Item*
    - *Learning Survey Content Item*
18. (Optional) Create learning campaigns to recommend content to users.

    See Steps: Set Up and Launch Learning Campaigns on page 1973.

19. (Optional) Copy managers and HR business partners (HRBP) on reminders generated from learning content. You can use role assignments to define the HRBP. This functionality doesn't support extended enterprise learners.

Related Information

Concepts

Concept: Best Practices for Creating Videos

Concept: Managing Files and Folders in Drive

Concept: Skills Cloud Translations on page 1866

Reference

The Next Level: Peer Learning

The Next Level: Prepare for a Workday Learning Deployment

Steps: Set Up Learning Content Description Generation and Revision

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Security: *Manage Learning Content* or *Set Up: Learning Catalog* in the Learning Core functional area.

Context

Learning content description generation and revision enables you to revise learning course descriptions using generative artificial intelligence and reducing manual effort. You can condense, expand, and professionalize the tone of existing text descriptions of digital and blended courses.

Workday uses these data points to revise learning course descriptions:

- Learning course title.
- Learning course description.

Note: We recommend that you establish best practices for reviewing, editing, and verifying the accuracy of the AI-generated content before use.

Steps

1. Access the Innovation Services and Data Selection Opt-In task.

   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.
2. On the Innovation Services Opt In tab, select HCM on the Available Services tab.
3. On the Maintain Innovation Services Data Selection Opt In tab, select HCM: HCM ML Features and Third Party Connectors GA.
4. Select the Opt In check box to enable the Learning Data category.
5. Access the Edit Tenant Set Up - HCM task.
6. In the Learning section, select Enable AI Generated Learning Content Description.

   You might need to wait up to 24 hours after you opt in for the AI-assisted options to display on your tasks.

Result

You can use the Condense, Expand, and Professionalize AI-assisted options on the Description field on these tasks, to revise learning course descriptions:

- Create Course
- Edit Course

Related Information
Reference
Workday Community: Generate and Revise Learning Content Descriptions

Steps: Set Up Advanced Catalog Management

Prerequisites

Security: These domains in the Learning Core functional area:

- *Learning Access*
- *Manage: Learning Content*
- *Manage: Learning Course Enrollments*
- *Set Up: Learning*
- *Set Up: Learning Catalog*

Context

You want to create multiple learning catalogs and configure segmented security so that topics inherit or override their catalog security.

Steps

1. Access the Create Learning Catalog task to create 1 or more catalogs for your learning content.
2. Access the Maintain Learning Catalogs task to set up content hierarchy for your learning catalogs.

   You can set catalogs to inactive to prevent Workday from using them for security evaluation.
3. Access the Create Learning Security Segment task to set up segmented security for your learning catalogs.

   Add a note to the Learners with Access field to act as a reminder of which learners can access the security segment. Example: All Employees.

Result

You've created a hierarchy for your learning catalogs to simplify how Workday applies security to your learning content.

Next Steps

Access the Manage Learning Security Segments task to view security configuration and which content learners can access.

Related Information

Tasks

Create Segment-Based Security Groups

Reference

2021 R2 What's New Post: Advanced Catalog Management

Steps: Set Up and Launch Learning Campaigns

Prerequisites

Note: We plan to migrate Campaign functionality to Engagement Builder in a future release. Workday recommends that you start using Engagement Builder for greater efficiency and visibility into your engagements. See: ../../../manage-workday/collaboration/engagement-builder/setup-considerations-engagement-builder.dita.

Create learning content to include as campaign items.

Context

You can create learning campaigns that engage target audiences in learning activities by:

- Promoting content on their Learning dashboards. When you create required learning campaigns, Workday displays the content in the Required for You worklet. You can create a custom slider to display all other campaigns.
- Sending notifications about the learning content.

The learning content might be:

- Legally required compliance courses, such as workplace violence prevention.
- Courses that the company or a manager wants their department to take, such as how to complete their expense reports.

To avoid delayed notifications and other system processes, Workday recommends that you contact the Workday Production Readiness team to help you test and prepare for running large volume campaigns in Production. Examples of large volume campaigns include those with:

- Audience sizes of over 100,000 workers.
- Frequent dynamic audience additions of over 100,000 workers.
- Over 100 daily scheduled campaigns.

For an audience size of 100,000, Workday recommends a minimum campaign duration of 30 days.

Steps

1. (Optional) Determine if your event is large enough that you need to work with the Workday Production Readiness Team. See Workday Community: Customer Events: Best Practices and Production Readiness for guidelines about opening up a Production Readiness case.
2. Create Segment-Based Security Groups.

   Grant your security group access to the *Extended Enterprise Campaigns* or *Learning Campaigns* segments.

3. Access the Domain Security Policies for Functional Area report.

   Select Domain Security Policy > Enable from the related actions menu of the *Administer Campaigns* domain security policy.

   Security: These domains in the System functional area:

   - *Security Activation*
   - *Security Configuration*
4. Edit Domain Security Policies.

   Grant permissions to your security group to the *Administer Campaigns* domain.
5. Edit Business Process Security Policies.

   Configure the security policy for the *Campaign Event* business process to add your security group.

   The security group must have access to the *Extended Enterprise Campaigns* or *Learning Campaigns* segments.
6. (Optional) Edit Business Processes.

   Configure the *Campaign Event* business process definition to include an approval step.
7. Enable and configure delivery settings for the Extended Enterprise Campaigns or Learning Campaigns notification types.

   See Reference: Edit Tenant Setup - Notifications.
8. (Optional) Create Email Templates.

   Email templates enable you to define the layout for email notifications. Create a custom template for emails associated with learning campaigns using the *Learning Campaign Emails* email template behavior.
9. Create learning audiences and campaigns.

   To assign and track required learning for specific audiences, select the *Required Learning* category on the Create Campaign task.

   You can enable dynamic updates to campaign audiences to:

   - Remove learners from audiences when they no longer meet the audience criteria. Workday removes any campaigned learning content from their Learning dashboards, including:
     - Learning content in the announcements area at the top.
     - Incomplete required learning content on the Required for You worklet and Progress > Required section.
   - Resend learning campaigns, when learners rejoin the audience.

   To enable dynamic updates, select the *Enable dynamic removal and resend* option on the Exclusion Rule prompt on these tasks:

   - Copy Campaign
   - Create Campaign
   - Edit Campaign

   Note: For pre-hire audiences, if you want campaigned content to remain as required learning when they transition to employees, remove the *Enable dynamic removal and resend* option.

   See Steps: Set Up Campaigns.

10. (Optional) Rescind a learning campaign.

    To rescind a learning campaign, you must:

    a. Edit the course in the campaign to *Inactive* to remove the requirement for all audience members.
    b. Delete the course from the campaign.
    c. Remove the incorrect workers from the campaign audience.
    d. Edit the course items in the campaign back to active.
    e. Add the course back into the campaign.
    f. Launch the campaign. It automatically picks up the course the next time it runs if you've scheduled a daily campaign run.

Next Steps

Access the Edit Campaign Categories task to update a course in your campaign. Examples: Due date or whether the content is required or not required learning. This update takes effect immediately and updates all open assignments in the campaign. Workday displays the update to all learners who have assigned, enrolled, and in progress enrollments.

Related Information

Concepts

Concept: Email Templates

Setup Considerations: Learning Campaigns on page 1960

Reference

Reference: Event-Specific Best Practices

Steps: Set Up Learning Certifications

Prerequisites

Create learning content.

See: Setup Considerations: Learning Content on page 1947.

Context

You can issue and renew certifications to learners based on their successful completion of associated learning content. Certifications improve learner engagement by encouraging skill development and help to ensure compliance in your organization.

You can use the Leaning Enrollments report data source in custom reports to print a completion certificate using a business form layout. See Steps: Create a Business Form Layout.

Steps

1. Access the *Create Business Process Definition* task to create a default definition for the *Manage Learning Certification Rule* business process.
2. Access the Create Certification task.

    - Create an issuer for the certification. Example: Workday Learning.
    - Create a name for the certification. Example: Health and Safety.

    Security: *Manage: Learning Certifications* domain in the Learning Core functional area.
3. Configure the *Manage Learning Certification Rule* business process definition.

4. Access the Create Learning Certification Rule task.

    - Select the learning content for the certification. Example: Health and Safety.
    - Select effective dates for the certification rule.
    - Select the Display on Content check box to display the related certification information to learners on the content overview and completion pages.

    Note:

    - If you rescind a certification rule, Workday removes the achievement, but doesn't delete the certification as this information remains useful for reporting purposes.
    - Learners must successfully complete the learning content within the effective dates in order to receive the certification.
    - Workday bases the expiry date of a learning certification on the expiry of the associated learning content.
    - We only display relevant certifications for the associated learning content.
    - You can only add 1 piece of content per certification rule.

Result

- Workday Learning issues a Health and Safety certification to all employees who successfully complete the Health and Safety course.
- Learners can view details for their awarded certifications using the View Certifications report of the content completion page or the Certifications tab on their Career Profile.

Next Steps

Configure the *Manage Learning Certification Rules* report to display on the Learning Admin dashboard so that you can manage content and effective dates for learning certifications.

Related Information

Reference

2021R2 What's New Post: Learning Certifications

Steps: Set Up Integration System User Security for Calendar Integrations

Prerequisites

- Configure Google Cloud Platform.
- Register a new application in the Microsoft Azure portal.
- Security: These domains in the Integration and System functional areas:
    - *Integration Security*
    - *Security Configuration*

Context

All calendar integrations for Learning require an integration system user (ISU) and integration system security group (ISSG). It's Workday policy to use an ISU with only the appropriate access for integration purposes. Administrators shouldn’t configure any integration security.

Steps

1. Access the Create Integration System User task.

   Create an ISU. We recommend using *Learning_Integrations_User* for the user name.

   - Each integration system must have a unique ISU.
   - Keep the session timeout value of zero to prevent session expiration.
   - Select the Do Not Allow UI Sessions check box to prevent the ISU from signing into Workday through the user interface.
2. Access the Create Security Group task.

   Create an ISSG and assign your ISU to it. We recommend using *Learning_Integrations_Group* for the user name.

   See: ../../../authentication-and-security/configurable-security/security-groups/integration-security-groups/wvu1571267715376.dita.
3. Access the Maintain Permissions for Security Group task to update domain security policies.
4. Add the *Set Up: Learning Catalog* domain to the Report/Task Permissions section with *View* and *Modify* access, and the Integrations section with *Put* access.
5. Run the Activate Pending Security Policy Changes task.

   Activate pending security policy changes for the integration.
6. Access the Edit Tenant Setup - HCM task.
7. Select the Enable Calendar Integration check box.

   Select a calendar provider and enter ISU details in the Learning Calendar Integration section.

Result

Workday assigns the ISU to the *Learning_Integrations_Group* security group so that they can run the integration for your organization.

Next Steps

Create and manage calendar invites that automatically synchronize with course offering updates and enrollment events.

Steps: Set Up Integration System User Security for Virtual Classroom Integration with Microsoft Teams

Prerequisites

- Create and configure your virtual classroom integration with Microsoft Teams.

  See: Steps: Set Up Virtual Classroom Integration with Microsoft Teams on page 1978.
- Security: These domains in the Integration and System functional areas:
  - *Integration Security*
  - *Security Configuration*

Context

All virtual classroom integrations with Microsoft Teams require an integration system user (ISU) and integration system security group (ISSG). Each integration system must have a unique ISU. It's Workday policy to use an ISU with only the appropriate access for integration purposes. Administrators shouldn’t configure any integration security.

Steps

1. Access the Create Integration System User task.

   Create an ISU. We recommend using *Learning_Integrations_User* for the user name.

   - Each integration system must have a unique ISU.
   - Keep the session timeout value of zero to prevent session expiration.
   - Select the Do Not Allow UI Sessions check box to prevent the ISU from signing into Workday through the user interface.

   Security: The *Integration Security* domain in the Integration functional area.
2. Access the Create Security Group task.

   Create an ISSG and assign your ISU to it. We recommend using *Learning_Integrations_Group* for the user name.

   Security: The *Security Configuration* domain in the System functional area.
3. Access the Maintain Permissions for Security Group task to update domain security policies.
4. Access the *Manage: Learning Virtual Classroom Integration* domain.

   Add the ISSG to the Report/Task Permissions section with *Modify* access and Integration Permissions section with *Put* access so that the integration can run.

   Security: The *Manage: Learning Virtual Classroom Integration* domain in the Learning Core functional area.
5. Run the Activate Pending Security Policy Changes task.

   Activate pending security policy changes for the integration.

Result

Workday assigns the ISU as part of the virtual classroom integrations with Microsoft Teams security group.

Next Steps

Create course offerings that include virtual classroom lessons for instructor-led training.

Steps: Set Up Virtual Classroom Integration with Microsoft Teams

Prerequisites

- Register a new application in the Microsoft Azure portal:
  - Take note of its Application (Client) ID value.
  - Give the application these API permissions:
  - *OnlineMeetings.ReadWrite.All*
  - *User.Read.All*
  - Add a Client Secret to this application.

  Note: To create calendar events, the integration needs ReadWrite access to a single mailbox defined in the tenant setup. Workday uses this to send calendar events to learners and instructors. See Configure Application Access Policy and Limit Application Permissions to Specific Exchange Online Mailboxes to configure policy rules using Microsoft Powershell to restrict ReadWrite access to one mailbox.
- Workday adds the Client ID that you generate from Microsoft Azure to your tenant.
- Configure policy rules using Microsoft PowerShell.
- Create and configure a new integration system.

Context

You want to integrate Workday Learning with Microsoft Teams so that you can create course offerings that include virtual classroom lessons for instructor-led training. This lesson type enables large, geographically diverse populations to join virtual classes for instructor-led training.

Steps

1. Create an Integration System User (ISU) for virtual classroom integration with Microsoft Teams.

   See Steps: Set Up Integration System User Security for Virtual Classroom Integration with Microsoft Teams.
2. Access the Create Integration System task.

   Add values for system name and template. We recommend you use the *Workday-delivered Learning Virtual Classroom for MS Teams Template* template.

   Security: The *Integration Build* domain in the Integration functional area.
3. From the related actions menu of the View Integration System report, select Workday Account.

   Select Edit Account for Integration System and add your ISU on the Workday account.
4. From the related actions menu of the View Integration System report, select Configure Integration Attributes for Integration System.

   Populate values for these fields:

   - Client ID: From your Microsoft Azure setup.
   - Client Secret: From your Microsoft Azure setup.
   - Tenant: Your Microsoft tenant ID.
   - Mailbox: To generate the Microsoft Teams link.

   Security: The *Integration Build* domain in the Integration functional area.
5. Access the Manage Course Offering business process and navigate to the Edit Business Process Definition task from the related actions.

   Add a new step and select *Integration* for the Type. This action prompts you to configure the integration system. If you've followed these steps, you don't need to select *Run as User*, as the integration automatically selects your ISU. Select your integration, and click *OK*.

   Use the Integration System - Proposed report field to create a condition rule so that this step only runs when the associated lesson has selected the integration. We recommend using different condition rules when you enable more than 1 integration, or instance of the integration, so that the correct condition rule runs for the correct integration.

   These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
6. (Optional) Configure attendance synchronization.

   Give *OnlineMeetingArtifact.Read.All* API permission to the application in the Microsoft Azure portal.

   Access the Learning section of the Edit Tenant Setup – HCM task. From the Select Virtual Classroom Integrations prompt, select the Microsoft Teams integration you want to use.

   Enter values on the Minimum Percentage for Full Attendance and Minimum Percentage for Partial Attendance fields. Select the Track Non-Attendance for Virtual Classroom check box.
7. (Optional) Set an instructor as a co-organizer of virtual classroom meetings so that they can create and manage breakout rooms.

Result

You can now create course offerings that include virtual classroom lessons for instructor-led training.

Note: Workday doesn't support unlimited capacity for course offerings that include virtual classroom lessons with Microsoft Teams integration.

Next Steps

See FAQ: Attendance Synchronization for Virtual Classroom Integration with Microsoft Teams and Zoom.

Related Information
Reference
2022R2 What's New Post: Virtual Classroom Integration with Microsoft Teams
2023R1 What's New Post: Virtual Classroom Integration with Microsoft Teams - Attendance Synchronization
Reference: Microsoft Environments for Workday Learning on page 2026

Steps: Set Up Virtual Classroom Integration with Zoom

Prerequisites

- Create and activate a server-to-server OAuth application in Zoom.
  - Add a name to your application. Workday recommends that you use *Learning Virtual Classroom Integration* for the application name.
  - Take note of its *Account ID*, *Client Secret*, and *Client ID*.
  - Add a short description, contact name, and developer contact information. You can populate the contact information fields at your own discretion.
  - Add these scopes:
    - *user:read:user:admin* - To ensure all instructors are users in the zoom tenant.
    - *meeting:write:meeting:admin* - To create meetings on behalf of default mailbox and organizer mailboxes
    - *meeting:delete:meeting:admin* - To delete old meetings, when editing lessons to update the organizer field.
    - *meeting:read:list_past_participants:admin* - To get attendance records for meetings created by Workday integration. This scope is optional. This is required if you’re planning to use Virtual Classroom Integration with Zoom - Attendance Synchronization that will be delivered in the future release.
- Create a default Zoom account associated with a mailbox for this integration.
- Security: *Manage: Learning Virtual Classroom Integration* domain in the Learning Core functional area.

Context

You want to integrate Workday Learning with Zoom to enable you to automatically create Zoom meeting links when scheduling virtual classroom lessons in course offerings. This will improve the learning admin experience for scheduling virtual classroom lessons and enhance the virtual classroom lessons for your global workforce.

You can add an organizer for a Zoom virtual classroom lesson. The organizer's mailbox associated with the Zoom account will be used to schedule a Zoom meeting, and the organizer will be the host for the virtual classroom lesson. If you enable calendar integration, Workday sends a meeting invite with a Zoom meeting link to learner's Outlook or Google calendar.

If you don't add an organizer on the course offering with a Zoom virtual classroom lesson, then the Zoom account associated with the default mailbox will be used to generate the Zoom link. Workday strongly recommends that you update the course offering and add the lesson level instructor and organizer after you identify an instructor to avoid limitations from Zoom related to concurrent meetings.

Note: Your integration will fail if you schedule or update an offering with an organizer who isn't in your Zoom tenant.

Note: Workday recommends caution when testing this feature in non-production environments as real email invites will be sent to learners' mailboxes.

Steps

1. Access the Create Integration System User task.

   Create an Integration System User (ISU). We recommend using *Learning_Integrations_User* for the user name.

   - Each integration system must have a unique ISU.
   - Keep the session timeout value of zero to prevent session expiration.
   - Select the Do Not Allow UI Sessions check box to prevent the ISU from signing into Workday through the user interface.

   Security: The *Integration Security* domain in the Integration functional area.
2. Access the Create Security Group task.

   - Your Type of Tenanted Security Group is *Integration System Security Group (Unconstrained)*.
   - We recommend you use *Learning Integration Group* for the user name.
   - Assign the ISU that you created to this security group.

   Security: *Security Configuration* domain in the System functional area.
3. Access the Maintain Permissions for Security Group task to update domain security policies.
4. Access the *Manage: Learning Virtual Classroom Integration* domain.

   Add the ISSG to the Report/Task Permissions section with *View* and *Modify* access, and the Integration Permissions section with *Get* and *Put* access so that the integration can run.

   Security: The *Manage: Learning Virtual Classroom Integration* domain in the Learning Core functional area.
5. Run the Activate Pending Security Policy Changes task.

   Activate pending security policy changes for the integration.
6. Access the Create Integration System task to add values for the System Name and Template fields.

   We recommend you use the Workday-delivered *Learning Virtual Classroom for Zoom* template.

   Security: The *Integration Build* domain in the Integration functional area.
7. Run the View Integration System report.

   From the related actions menu:

   - Select Workday Account > Edit and add your ISU on the Workday account.
   - Select Configure Integration Attributes for Integration System and populate values for these fields:
     - Account ID: From the Zoom app you created on your Zoom setup.
     - Client ID: From the Zoom app you created on your Zoom setup.
     - Client Secret: From the Zoom app you created on your Zoom setup.
     - Mailbox: The mailbox associated to the default Zoom account that you created on Zoom Admin console.
     - Participant Limit: Populate this field based on the lowest limit that your Zoom licenses support. Example: If instructor A has a business license with a maximum participant limit of 300 and instructor B has an enterprise license with a maximum participant limit of 500, enter the participant limit as 300 in Workday.

   Security: The *Integration Build* domain in the Integration functional area.

8. Access the *Manage Course Offering* business process and navigate to the Edit Business Process Definition task from the related actions.
    a) Add a new step.
    b) Select *Integration* for Type.

       This action prompts you to configure the integration system. If you've followed these steps, you don't need to select *Run as User* as the integration automatically selects your ISU.
    c) Select your Zoom integration and click OK.

   Security: These domains in the System functional area:

    - *Business Process Administration*
    - *Manage: Business Process Definitions*
9. From the related actions menu of the new step, select Business Process > Maintain Step Conditions.
    a) In the Maintain Step Conditions task, select *Create Condition Rule* from the Rule prompt.
    b) In the Create Condition Rule task, enter Description.
    c) Create these 2 rule conditions:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Integration Systems - Proposed*	*any in the selection list*	*Value specified in this filter*	Zoom Integration System
Or	*Integration Systems - Current*	*any in the selection list*	*Value specified in this filter*	Zoom Integration System

10. Access the Edit Tenant Setup – HCM task.
11. Select a Zoom integration from the Select Virtual Classroom Integrations prompt.
12. (Optional) Configure attendance synchronization.

    Add *meeting:read:list_past_participants:admin* and *meeting:read:list_past_instances:admin* scopes to your server-to-sever OAuth application.

    Access the Learning section of the Edit Tenant Setup – HCM task. From the Select Virtual Classroom Integrations prompt, select the Zoom integration you want to use.

    Enter values on the Minimum Percentage for Full Attendance and Minimum Percentage for Partial Attendance fields. Select the Track Non-Attendance for Virtual Classroom check box.

Result

You can automatically add Zoom meeting links to courses or send meeting invites with Zoom meeting links to learner's Outlook or Google mailbox.

Next Steps

See FAQ: Attendance Synchronization for Virtual Classroom Integration with Microsoft Teams and Zoom.

Related Information

Reference

Reference: Zoom Limitations for Virtual Classroom Integration on page 2025

Virtual Classroom Integration with Zoom

Configure Google Cloud Platform for Learning Calendar Integration

Prerequisites

Set up a Google Cloud account.

Context

Before you can enable Google Calendar integration for your Workday tenant, you must configure the Google Cloud Platform.

Steps

1. Sign into the Google Cloud Platform.
2. Configure the Google Cloud Platform.

   See the *GCP Configuration Steps* in Google Calendar Integration and Language Support.
3. Note the Service Owner Key in JSON format and organizer mailbox values from your Google Cloud Platform configuration.

   You'll need to enter these values in the Edit Tenant Setup - HCM task in Workday when you enable Google Calendar integration for your tenant.

Next Steps

Enable Google Calendar integration for your Workday tenant.

See Configure Google Calendar for Learning.

Register Your Client-Side Application for Learning Calendar Integration with Microsoft Outlook

Prerequisites

Set up administrator access to an Azure Active Directory (AD) tenant.

Context

When you register your client application for the Learning calendar integration with Microsoft Outlook, the Microsoft identity platform can provide authentication and authorization services for the application and its users.

You can configure permissions to enable the Learning calendar integration web API to:

- Access Microsoft Graph.
- Read and write calendars in all mailboxes.

Note: To create calendar events, the integration needs ReadWrite access to a single mailbox defined in the tenant setup. Workday uses this to send calendar events to learners and instructors.

Steps

1. Register the application in the Azure portal and add credentials:

   - Enter a display name that you can easily recognize as the client for the application. Example: *Learning Calendar*.
   - For Supported account types, select a suitable option for your organization.
   - Take note of your Application (client) ID and Tenant ID values, and add a client secret. You'll need these values for setting up your Microsoft Outlook integration in Workday.

   See Quickstart: Register an application with the Microsoft identity platform.

2. Add API permissions for the application.

   Enable the Learning calendar integration web API to access Microsoft Graph:

   - Add Calendars.ReadWrite as the application permission.
   - Grant admin consent for your client application.

   See Quickstart: Configure a client application to access a web API.
3. Configure policy rules using Microsoft Powershell to restrict ReadWrite access to one mailbox.

   See Configure Application Access Policy and Limit Application Permissions to Specific Exchange Online Mailboxes.

Related Information

Reference

FAQ: Microsoft Outlook Integration with Workday Learning on page 2033

Create Stand-Alone Learning Lessons

Prerequisites

- Access the Manage Topics task to create learning topics that categorize your learning content.
- Configure Drive to manage access to, and security for, many file types. See Steps: Set Up Drive .
- Sign up for Workday Media to enable learners to consume media content.
- Create any videos or documents that you want to include as media lessons.
- Configure the *Manage Lessons* business process and the security policy in the Learning Core functional area.
- Security:

  These domains in the Learning Core functional area:

  - *Learning Access*
  - *Manage: Learning Content*

Context

You can create items of learning content that users can access as single stand-alone units or as part of a course.

Stand-alone lessons don’t require enrollment and are a good way to support peer-to-peer learning. They typically have a narrow focus on a single subject. Examples include:

- Course guides.
- Job aids.
- Recorded lectures.
- Software demonstrations.
- Videos.
- Any other item that learners can access on their own as a single unit.

Steps

1. Access the Create Lesson task.
2. As you complete the task, consider:

Option	Description
Title	Enter a unique title for the lesson. Note: While stand-alone lessons can't reuse other stand-alone lessons titles, you can reuse the stand-

Option	Description
	alone lesson title when building a lesson within a course.
Media	Select or drop a unique media file for each stand-alone lesson. Workday doesn't support SCORM or AICC packaged media files for stand-alone lessons.
Exclude From Recommendations	Workday populates these content container worklets on the Learning dashboard with recommendations for relevant learning content: • Based on Your Interests • Based on Your Skills to Develop • Most Popular • Popular in Your Role • Recently Added • Recommended for You • You Might Also Be Interested In Workday also includes learning recommendations on these reports: • Opportunity Graph (in the Popular for This Role section). • View Competency. Select this option to exclude the lesson from the results.
Exclude From Search and Browse	Select this option to exclude lessons from appearing in the Browse Learning Content report and global search results. Administrators, assessors, and instructors for excluded lessons can still view them using global search. If you've customized the Browse Learning Content report for your company, Workday recommends that you manually update the *Exclude from Search and Browse* filter on pre-existing reports.

3. (Optional) To enable learners to create and edit stand-alone lessons, add the *Employee as Self* security group to the Create Lesson initiating action on the *Manage Lesson* business process security policy.
4. (Optional) Add an approval or review step to the *Manage Lesson* business process.

Related Information

Concepts

Setup Considerations: Learning Content on page 1947

Tasks

Create Learning Courses on page 1986

Create Learning Courses

Prerequisites

- Create learning instructors.

  See: Steps: Set Up Learning Instructors on page 1888.
- Create any videos or documents that you want to include as media lessons.
- To add additional data that is specific to your organization, you can create custom fields for learning courses. You can only use these custom fields in calculated fields for your learning content.
- To get feedback on a course, course offering, or lesson, or to evaluate learner knowledge, you can add a survey. Before adding a survey as a lesson, access the Create Survey task. Create and launch the survey and select the Send via link option. Workday generates a link that Learning uses to enable you to add the survey as a lesson. You don't need to copy the link.

Security: These domains in the Learning Core functional area:

- *Learning Access*
- *Manage: Learning Content*
- *Set Up: Learning Catalog*

Context

Create a course and add lessons.

Steps

1. Access the Create Course task.
2. As you complete the task, consider:

Option	Description

Course Type	Select either:
	• *Create Blended Course*: Enables you to include these lesson types:
	  ◦ External Content.
	  ◦ In Person Classroom (Instructor Led) or Virtual Classroom (Instructor Led).
	  ◦ Media (video, packaged content, and documents).
	  ◦ Survey.
	  ◦ Acknowledgment lessons, which allow learners to acknowledge their understanding of learning content.
	  ◦ Training Activity lessons enable you to upload documents such as assessments, observations, or demonstrations for when a learner must demonstrate a manual training skill that a live trainer must sign off. Example: Warehouse forklift driving. A trainer teaches a learner how to drive a forklift and then the learner demonstrates their forklift driving

Option	Description
	ability. The training materials for this training activity lesson could include PDF documents such as a Warehouse Demonstration Manual that the learner must study, and a Forklift Assessment Checklist that the trainer uses to assess the learner's forklift driving. The trainer uses this live assessment to give the learner a *Pass/Fail* for the training activity lesson in Workday. A blended course is a template from which you can create unique course offerings. You can schedule offerings in different locations for instructor-led classroom training, and at different times, for both classroom training and webinars. Learners can then select the offering they want to enroll in. You can also use a blended course to create a digital course with different versions that contain only digital content. The blended course can contain any lesson combination of external content, media, and surveys. All course offerings relate to a blended course, so you can report on the course as a whole. Workday applies effective dating to blended courses, so you can: • Report on their changes over time. • Schedule course offerings based on the course version that you're viewing. A course version is effective until you add a new version. If you add a new version for a course, Workday replaces the current version. The current version expires unless its Effective Date is in the future. In that case, it remains available for editing so that you can plan future enhancements to the course. • *Create Digital Course*: Enables you to include any lesson type except Instructor Led and Training Activity lessons. You don't need to schedule digital courses, so course offerings don't apply.
Skills	(Optional) You can tag skills to your course using 1 of these prompt options:

Option	Description
	• By Category: To access pre-existing tenanted skills. • Recommended Skills: Machine learning produces a set of recommended skills based on the title and description of your content. • Create Maintained Skills: Enables you to create a new tenant-specific skill. Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
Language	(Optional) You can tag 1 or more languages to your course, enabling learners to find it when they browse the learning catalog by a specific language.
Security Category	To restrict access to the course by security category segment, either: • Select a security category. • Click Create Learning Security Category to create a new category and restrict the category and course by security segment. Note: Workday doesn't apply effective dating to this prompt, so changes to blended courses affect all course offerings.
Exclude from Recommendations	Workday populates these content container worklets on the Learning dashboard with recommendations for relevant learning content: • Based on Your Interests • Most Popular • Popular in Your Role • Recently Added • Recommended for You Workday also includes learning recommendations on these reports: • Opportunity Graph (in the Popular for This Role section). • View Competency. Select this option to exclude the course from the results.
Exclude from Search and Browse	Select this option to exclude courses from appearing in the Browse Learning Content report and global search results. Administrators, assessors, and instructors for excluded courses can still view it using global search.

Option	Description
	If you've customized the Browse Learning Content report for your company, Workday recommends that you manually update the *Exclude from Search and Browse* filter on pre-existing reports.
Disable Express Interest	(Optional) For offerings on blended courses, select this check box to disable the Express Interest button for learners.
Version Schema	(Optional) For blended courses, select a version schema. See: Create Version Schemas for Blended Courses on page 1998
Custom Version Label	You can specify a unique name for your versioned content so that learners can more easily identify which version to consume.
Version Notes	(Optional) For blended course types, enter rich text notes about the Version.
Effective Date	You can specify a date in the future to postpone availability for scheduling course offerings.
Time Value	(Optional) Helps learners gauge the amount of time they need to complete all of the lessons in the course, including any instructor-led lessons and digital content. Depending on how long you think the class lasts, overestimate and round appropriately. Example: if you select *Minutes*, round to the nearest 5 or 15 minutes when entering Total Course Duration.
Retrain Window Value	(Optional) Enter a number of either weeks or months to specify the time period of the retrain window. The retrain window triggers retraining content to display on the Required For You slider within the defined window. The Retrain Window recognizes a successful completion for initial assignments and retraining assignments if a learner completes the content when the Retrain Window is open.
Weeks/Months Before Expiration	Select either weeks or months in relation to the Retrain Window Value.
Enable Auto-Enrollment from the Waitlist	For blended course types, select this check box to enroll learners from a waitlist automatically when space in a course offering becomes available. Ensure that you also set the Waitlist Capacity field.
Minimum Enrollment Capacity	The minimum number of enrollments that make the course offering viable. The default is zero. If the number of enrollments doesn't meet this

Option	Description
	value, the course offering can still go ahead as scheduled. The value is for reporting purposes only.
Maximum Enrollment Capacity	For blended course types, specify the maximum number of learners who can enroll in a course offering. Enter a value greater than zero to enable learners to enroll.
Course Number	(Optional) Your company can use your own numbering scheme for courses. Enter the number that your company uses to identify the course.
Status	Indicates whether the digital course is: • Open: Open for enrollment. • Closed: No longer available for enrollment. On the Learning dashboard, learners who enrolled in a course, then started or completed it, can continue to access the course from the Progress menu.
Requires Enrollment	For digital courses, this setting indicates whether the course: • Requires enrollment (the default). The *Enroll in Content* business process applies to learner enrollments. • Is available on demand. If you clear the check box, when learners begin the on-demand course, Workday creates an enrollment record in the background to support robust reporting.
Waitlist Capacity	For blended course types, this value specifies the number of spaces on the waitlist. Enter a number greater than zero to configure a waitlist for the course.
Expiry Period	(Optional) Specify an expiry period that applies to enrollments for this course. You can create expiration rules that define learner group rule conditions and expiry periods for each group, on these grids: • Advanced Learning Expiration Rules • Advanced Learning Expiration Rules for Extended Enterprise Learners Access the Create Learner Group Rule task from the Learner Group Rule prompt to define condition rules, or select an existing rule. For extended enterprise learners, use the Create Extended Enterprise Learner Group Rule task.

Option	Description
	Workday automatically adjusts the expiry period of the course for learners who meet the rule conditions of a learner group rule. The expiration date, duration, or recurrence frequency setting is the default expiry period of the course for learners who don't meet the learner group rule conditions for any expiration rule.
Unlimited Capacity	(Optional) Indicates that there's no limit to the number of learners that can enroll in a course offering. Selecting this check box overrides the Maximum Enrollment Capacity value.
Units	Add the available unit types, or add additional unit types to the Units grid. Use the Manage Other Unit Types task (secured to the *Set Up: Learning Catalog* domain) to add additional unit types. When you add units to a course or course offering, Workday displays them on the View Course report so that learners understand the units associated with the content and their value.
Cost	Add the sales item to the Cost grid when creating or editing a course. Use the Create Sales Item task (secured to the *Set Up: Sale Item* domain) to create sales item to add it to the Cost grid. Course costs enable you to itemize and track the internal costs associated with offering a course. The total cost of the sales items that you add to a course is visible to learners who browse learning content. If you add multiple sales items to a course, you will only be able to report on the total of the sales items as you can't itemize sales items in custom reports.
Pricing	Enter the number of training credits that the course is worth in the Price (Training Credits) field. You can use these grids to set prices for groups of learners that are different from the default course price: • Advanced Pricing Rules for Workers • Advanced Pricing Rules for Extended Enterprise Learners

Option	Description
	Use the Create Worker Pricing Rule and Create Extended Enterprise Learner Pricing Rule tasks (secured to the *Manage: Learning Pricing Rules* domain) to configure condition rules for use in advanced pricing rules. This Pricing section only displays when you enable pricing configuration for at least 1 person type on the Edit Tenant Setup - HCM task. Select Enable E-Commerce check box to add a mandatory prerequisite step of completing a successful payment through a payment processor before the learner can consume the content. Enable E-Commerce check box only displays when you configure E-Commerce for Learning on the Maintain E-Commerce for Learning task.
Lesson Details	You can add multiple instructor-led and training activity lessons to blended courses. Before you add these lesson types, specify: • Allowed Instructors: Who can teach the classroom training and webinar lessons in the course. • Allowed Assessors: Who can assess the training activity lessons in the course. • Location: Active business sites where you can schedule classroom training for offerings.
Enforce Lesson Order	Select this check box to apply the order number sequence defined in the lesson order. When selected, learners can't access self-directed mandatory lessons (including media, surveys, and external link lessons) until they complete the previous required content. • When the course contains any virtual or in-person instructor-led training lessons, subsequent lessons are available after the end date of the instructor-led lesson. • When the course contains any required training activity lessons, subsequent lessons are available after grading and attendance is completed. To enforce the lesson order you need to have, at least, 2 mandatory lessons, with one of them being self-directed.

3. (Optional) In the Competencies grid, add competencies that relate to the course. Workday tags the course and course offering with the competencies that you add.
4. Click Add Lesson to add 1 or more lessons.

5. As you complete the lesson details, consider:

Option	Description
External Content	Enables you to link to external content or existing lessons by adding their URL to the Content URL field.
Lesson Order	Sequences the lessons within the course. The lessons display in sequence from 1-*n* by default. You can reorder the sequence, if necessary by changing the number in this field. To ensure learners complete the required lessons in the designated sequence, select the Enforce Lesson Order check box.
Make Lesson Mandatory	Indicates whether the lesson counts towards the course completion. Clear the check box if you want to make the lesson optional. You can add both mandatory and optional lessons.
Media	If you select a media file from Drive, to avoid access errors, ensure that you or the media owner shares the file in Drive with other learning administrators who might need to review and approve the course as part of the *Manage Course* business process. Restrict access to media content using: • The Edit Settings button on the View Media report. • The View Media button on the administrator view of the learning content. Setting the *Restrict Access* flag to *Yes* ensures that Workday restricts content based on the authentication policy.
Provide Course Grade	For media lessons, you can select the Provide Course Grade check box to nominate the lesson as the one that provides the overall course grade if it is: • A video that contains multiple choice questions as video interactions and has a Passing Score value set. • Packaged content.
Track Attendance	Indicates whether to record attendance for the instructor-led lesson for learners who enroll in the course.
Track Grades	Indicates whether to record grading details for the instructor-led lesson for learners who enroll in the course. If you select the check box, the primary instructor or a learning administrator must provide the overall course grade.

Option	Description
	The Grading Scheme that you can use to evaluate learner proficiency for the lesson is currently limited to *Pass/Fail*.

Result

Workday routes the course for review or approval, depending on your *Manage Course* business process configuration.

Next Steps

- Access the Edit Tenant Setup - HCM task to enable packaged content for your tenant.

  See: Setup Considerations: Packaged Content for Learning on page 2064.
- Access the Schedule Offering report and select a blended course. Create course offerings from this blended course if the *Manage Course* business process is complete.
- Use the Translate Business Object report to translate field values on the *Learning Course* business object in the *Learning: Learning – Course Management* category to support global learning.

  You can also edit translations from the related actions menu of the learning course or topic. Example:

  1. Access the View Digital Course report.
  2. Select the Administrative tab.
  3. Select Translation > Translate Instance as a related action on the Digital Course title or Topics name.

     See Translate Business Data.

Related Information

Concepts

Concept: Best Practices for Creating Videos
Concept: Effective Dates
Concept: Expiry Periods for Learning Content on page 2014

Tasks

Create and Send Surveys
Create Business Process Condition Rules
Create Custom Field Types
Create and Edit Custom Object Definitions
Enable Skills Cloud on page 1854
Steps: Set Up Competencies on page 122
Steps: Set Up Skills Cloud on page 1852
Steps: Set Up Learning Content Description Generation and Revision on page 1971

Reference

FAQ: Uploading and Viewing Videos
Reference: Editing Videos
Reference: Security Domains and Drive Item Management
Reference: Learning Content Effective and Non-Effective Dated Fields on page 2027
The Next Level: Learning Video Interactions
2022R2 What's New Post: Fixed Recurring Expiration Dates

Create Learning Course Offerings

Prerequisites

- Security: These domains in the Learning Core functional area:
  - *Manage: Learning Content*
  - *Set Up: Learning Catalog*
- Create a blended course.

  See: Create Learning Courses on page 1986.
- To add additional data that is specific to your organization, you can create custom fields for learning course offerings. You can only use these custom fields in calculated fields for your learning content.
- If you want to schedule an instructor-led classroom training lesson in a specific room at an existing business site location, ensure that you create a location with a Location Usages value of *Training Room* and a Superior Location that's a business site.
- To set unlimited enrollment capacity for a course offering, access the Edit Course Offering task or Schedule Offering report and select the Unlimited Capacity check box. You can only select or deselect this check box when there are no enrollments on the course offering, including cancelled, rescinded, or dropped enrollments. Once you set enrollments for a course offering to unlimited capacity and the offering has any enrollments, you can't switch back to limited capacity, and vice versa.

Context

Learning course offerings are specific instances of a course that are made available to learners for enrollment. The course offerings can be scheduled based on the version of a blended course.

A blended course serves as a template from which you can create unique course offerings, allowing for a combination of different lesson types, including external content, media, and surveys. Each offering is associated with specific dates and locations, providing learners with options that suit their needs.

Steps

1. Access the Schedule Offering report.
2. Search for the blended course that you want to schedule as a course offering.
3. The View Course report displays the current version. You can schedule the offering based on the current version, or click View beside a different version on the Versions tab. Click Scheduling to open the Schedule Course Offering task.
4. (Optional) Access the Configure Optional Fields task.

   You can mark these fields as required for the relevant lesson types on course offerings:

   - Instructor Led Lesson - Instructor
   - Instructor Led Lesson - Location
   - Language
   - Training Activity Assessor
   - Virtual Instructor Led Lesson - Instructor

   When you mark these fields as *Required for All*, they display as required on all tasks and web services where a course offering can be created or edited. If you don't mark them as required on the tasks or web services, they display as optional by default. You can also mark them as required for specific security groups only. Examples: Managers, Team Leads.

   Primary Assessors, Primary Instructors, and Primary Locations aren't supported fields on the Configure Optional Fields task. To make 1 or more of these fields required, you must configure a custom validation on the *Manage Course Offering* business process.

5. As you complete the task, consider:

Option	Description
Maximum Enrollment Capacity	Specify the maximum number of learners that can enroll in the course, if different for this offering. Enter a value greater than zero in this field to enable learners to enroll in the offering.
Update Status from Offering Dates	For courses with instructor-led lessons that aren't required learning, Workday automatically updates the Status field. Based on the start and end dates of the course offering, Workday moves the offering from *Open* to *In Progress*, to *Closed*. If you want to set the availability status manually, clear the check box. The status for closed course offerings that have passed their end date remains *In Progress* after you update grading and attendance if the instructor-led lessons are required learning.
Status	Indicates the availability status for the course offering: • Open: Open for enrollment. • In Progress: Course offering not available for enrollment. • Closed: No longer available for enrollment. Learners who have enrolled in, started, or completed the course can continue to access it from the Progress menu on the Learning dashboard.
Language	If the course is available in multiple languages, select 1 or more languages to enable learners to filter their search by a specific language when they browse the learning catalog.
Instructor Led Details	If the course offering contains instructor-led or training activity lessons, you can set: • Primary Instructors: Can enter grading and attendance results for the overall course and for all lessons in the course. Primary instructors can also override results that instructors enter for individual instructor-led training lessons. Required for in person classroom and virtual classroom lessons. • Primary Assessors: Can enter assessment results for training activity lessons. Primary assessors can also override results that assessors enter for individual training activity lessons. Required for training activity lessons. • Primary Location: The primary business site for the offering. You can schedule multiple lessons in different locations. Required for classroom lessons.

6. Add or edit lesson details that apply to the course offering. As you complete the details for instructor-led lessons, consider:

Option	Description
Location	For classroom training, you must either: • Select an existing location. • Configure ad hoc location details.
Time Zone	For classroom training, if you configure an ad hoc location, you must specify the time zone that corresponds to the location where the instructor will deliver the lesson. For virtual classroom training, you must specify the time zone that corresponds to the location where the instructor will host the virtual classroom lesson. When displaying virtual classroom start and end dates and times, Workday automatically localizes these details, based on your preferred time zone. Course offering start and end dates and times also reflect localized virtual classroom times. Classroom training lessons display in the time zone of the location on the lesson.
Organizer	Workday displays this field in the lesson level, only when you select Integration System for the Virtual Classroom Setup field and then select a Zoom integration for the Integration System field. If you select an instructor on a lesson for a zoom integration, the Organizer field becomes mandatory. Workday populates the Organizer field with the list of instructors selected in the Instructors field. Instructors and organizers must have a valid work email address associated with a Zoom account which is used to generate the Zoom meeting link.

Result

Learners can find courses and enroll in course offerings on the Learning dashboard. When they select the Select Offering task, the offerings table displays:

- A *Save* filter filter which learners can use to search and save results under a personalized name for future use. Example: Paris Location
- Course offerings by their start date.
- Cost and Version details only if you add values to them.
- Offerings that have capacity at the top of the list. It displays full offerings with waitlists at the bottom of the list.
- The lesson location on the primary table:
    - If no lesson location is configured, we display the primary location by default.
    - This can display multiple locations if lessons exist in multiple locations within a course.

Workday checks for an exact match between the learner location and the course location, and displays them first on the list but we don't apply a proximity check.

Instructors can view start and end dates and times for the offering lessons that they deliver on the Instructor Schedule Calendar.

Next Steps

- If you edit the time or date for a course offering that has a virtual classroom lesson, an update sends to all registered attendees with the new time or date for the Google or Microsoft Outlook calendar event that was created for the lesson.
- If the Track Attendance and Track Grades check boxes are selected on an offering, you can access the Manage Grading and Attendance task to record details for learners who are enrolled in the offering.
- Use the Translate Business Object report to translate field values on the *Course* business object in the *Learning: Learning – Course Management* category to support global learning.

  See Translate Business Data.
- Use the *Cancel Course Offering* business process to cancel a course offering and notify the enrolled learners and their managers. Workday hides canceled course offerings from the Browse Learning Content report so that learners can no longer view them.

Related Information
Tasks
Create Locations

Create Version Schemas for Blended Courses

Prerequisites

- Security: These domains in the Learning Core functional area:
  - *Manage: Learning Content*
  - *Set Up: Learning Catalog*
- Create a blended course.

  See: Create Learning Courses on page 1986.

Context

You can create version schemas for blended courses in your learning catalog, so that you can version your content consistently. This provides the ability to automatically label blended courses in your organization, and enables you to track and report details, such as content and learner consumption.

Steps

1. Access the Create Version Schema task.
2. As you complete the task, consider:

Option	Description
Schema Name	You can specify a unique name for your schema. Example: GMS Version Schema
Prefix	(Optional) You can specify prefix text to affix to the schema label. Example: Version
Major Version	Enter an numeric version label to identify the schema version. Example: 1

Option	Description
Increment	Enter the value by which you want to increment the version each time you make an update.
Postfix	(Optional) You can specify postfix text to affix to your schema label. Example: (INTERNAL)
Allow Minor Version	(Optional) Selecting this option enables you to make minor version updates. A minor update means that the version number adds an increment after the decimal point. Example: Version 1.1
Inactive	Select this option if you want to make your version schema inactive.
Schema Preview	You can preview the version schema label that displays to learners. Example: Version 1 (INTERNAL)

3. Click Submit on the Create Schema task to save your changes.
4. Navigate to your chosen blended course.
5. Open the Admin view and select Edit on the related actions menu.
6. To create a new effective version, select the Add New Version Effective Date option and select a date.

   The new active version of the course commences on this chosen date.
7. Navigate to the Versioning section of the Edit Course task.
8. Select a Version Schema from the drop-down list:
   - Select *Minor* (if the schema permits) or *Major* from the Version Update Type options.
   - Ensure that you've selected the Display Schema Label to Learners option.
   - Check the Schema Preview field to ensure that the version added by the schema is set to display for learners.
   - (Optional) Enter a Custom Version Label value.
   - (Optional) Add an explanation note to the Version Notes field that displays on the blended course. Example: 2024 Version for All Learners.
9. Click Submit on the Edit Course task to save your changes.

Result

- You've created version schemas and added them to your blended courses.
- Version details can be viewed when learners select the Enroll button. Learners can view which versions of learning content they've enrolled in and completed on the Learning tab of their Workday profile.

Example

If you want to rescind an earlier version of a blended course, we strongly recommend that you rescind in the correct order. This is a best practice and helps to avoid performance issues with your versions.

Example: You create multiple versions of a course and name them Version 1, Version 2, Version 3, and Version 4. You decide to rescind Version 2 of the course. To maintain order within your catalog, you should first rescind Version 4, then rescind Version 3 before you rescind Version 2, when Version 2 was created before Version 3 and Version 4.

Next Steps

You can create another new effective version by selecting Edit on the Edit Course task:

- Select the Add New Version Effective option.
- Select a future date.
- Select a Version Update Type.

You can update an existing version by selecting Edit on the Edit Course task:

- Select the Existing Version Effective option.
- Select a date between the current date and the new effective version.
- Select the version you want to update. The version label doesn't increment or change.

If you edit a schema that's used on a course, we update labels on the existing versions of the course to adhere to the new schema, including on the learner transcript.

Select View as Learner and navigate to Additional Course Details to view which version is used for the offering.

Navigate to the Versions tab of the Admin view for the learning content to:

- Add a new version.
- View a previously created version of a course. Versions effective in the past that were created before the version schema was added to a piece of learning content aren't given a number by the schema. Versioning starts at the current effective version, or if this doesn't exist, the first future effective version.
- View all versions.

Navigate to the Scheduling tab to:

- View all scheduled offerings.
- View a version of a specific offering.

Move Instructor-Led Classroom Training Online

Prerequisites

- Configure the *Manage Course Offering* business process security policy in the Learning Core functional area. Grant access to security groups for the *Update Offering to Online Only* initiating action.
- Schedule webinar sessions to host online training. You'll need the webinar URL and login details before you convert the training.
- Run the Manage Learning Content report to select the blended course containing the instructor-led classroom training lessons that you want to move online.

Context

You can move an existing course offering online by changing its instructor-led classroom training lessons to webinars.

Steps

1. On the View Course report for the blended course, select the Scheduling tab.
2. Select Course > Update Offering to Online Only from the related actions menu of the course offering.
3. Select lessons to convert from classroom training to webinars.
4. Enter the webinar details for each lesson. For Time Zone, specify the time zone of the location where the instructor will host the webinar.

Next Steps

- On the course offering, verify that Workday has converted the instructor-led classroom lessons to instructor-led webinars.
- Notify all instructors and learners of your changes.

Related Information

Tasks

Steps: Set Up Security for Learning on page 1913

Reference

Reference: Learning Business Processes on page 1918

Create Learning Programs

Prerequisites

- Create any courses and stand-alone lessons that you want to include as content items.
- Create any skills that you want to tag to a program.

  See: Enable Skills Cloud on page 1854.
- To add additional data that is specific to your organization, you can create custom fields for learning programs. You can only use these custom fields in calculated fields for your learning content.
- Configure any external content that you want to include as content items.
- Security: These domains in the Learning Core functional area:
  - *Manage: Learning Content*
  - *Set Up: Learning Catalog*

Context

Workday Learning programs enable you to:

- Group courses and lessons.
- Create learning campaigns using a single program content item that includes multiple courses and lessons.

Programs make it easier for:

- You to create required learning campaigns that cover an entire curriculum.
- Users to enroll in required learning.

When learners click Begin on the View Learning Program report, Workday effectively enrolls them on the program as part of a background process.

Workday enrolls learners in programs, but doesn't initiate a business process, so learners don't need approval to enroll. Workday initiates the *Enroll in Content* business process for each course that the learner enrolls in within a program.

Steps

1. Access the Create Program task.
2. As you complete the task, consider:

Option	Description
Skills	(Optional) You can tag skills to your program using 1 of these prompt options: • By Category: To access pre-existing tenanted skills.

Option	Description
	• Recommended Skills: To access recommended skills, if you've opted into Skills Cloud and signed the Innovation Services Agreement. Machine learning produces a set of recommended skills based on the title and description of your content. • Create Maintained Skills: Enables you to create a new tenant-specific skill. Security: *Set Up: Skills and Experience* domain in the Worker Profile and Skills functional area.
Language	(Optional) You can tag 1 or more languages to your program, enabling learners to find it when they browse the learning catalog by a specific language.
Requires Enrollment	• If selected learners view an Enroll button on the program, which ensures that their manager approves their enrollment before they can start consuming the content. • If not selected learners view a Start Program button. They can start consuming the content immediately and Workday creates an automatic enrollment for them in the background.
Security Categories	Select or create a security category to restrict access to the program by security segment.
Exclude from Recommendations	Workday populates these content container worklets on the Learning dashboard with recommendations for relevant learning content: • Based on Your Interests • Most Popular • Popular in Your Role • Recently Added • Recommended for You Workday also includes learning recommendations on these reports: • Opportunity Graph (in the Popular for This Role section). • View Competency. Select this check box to exclude the program from the results.
Exclude from Search and Browse	Select this option to exclude programs from appearing in the Browse Learning Content report and global search results.

Option	Description
	Administrators, assessors, and instructors for excluded programs can still view it using global search. If you've customized the Browse Learning Content report for your company, Workday recommends that you manually update the *Exclude from Search and Browse* filter on pre-existing reports.
Version	(Optional) Enter an alphanumeric version label.
Version Notes	(Optional) Enter rich text notes about the Version.

3. (Optional) In the Cost grid, add sales items that relate to the program.
4. (Optional) In the Competencies grid, add competencies that relate to the program. Workday tags the program with the competencies that you add.
5. (Optional) Configure program expiration rules.

   In the Expiration Rules section, configure expiry periods for:

   - Default Expiration Rule.
   - Advanced Learning Expiration Rules for Workers.
   - Advanced Learning Expiration Rules for Extended Enterprise Learners.

   See: Concept: Expiry Periods for Learning Content on page 2014
6. Click Add Content to add learning content from the learning catalog in your tenant.

   You can add:

   - Blended courses.
   - Digital courses (both internal and external third-party content).
   - Lessons (both internal stand-alone lessons and external content).

   As you add content items, consider:

Option	Description
Enforce Content Order	Select this check box to apply the order number sequence defined in the content order. When selected, learners can't complete mandatory content items until they successfully complete the previous required content items. • When a course or course offering requires enrollment, learners can enroll but won’t be able to start the course until they complete the previous required content items. • When the program contains any blended courses with offerings with virtual or in-person instructor-led training, subsequent required content is not available until grading and attendance is completed. To enforce the lesson order you need to have, at least, 2 mandatory content items in the program.

Option	Description
	Order sequencing doesn’t apply when: • Learners access the course outside of the program. Example: using the global search, using reports, or sliders. • Learners have successfully completed the content outside of the program prior to enrollment and Recognize Previous Completion is enabled.
Skip Enrollment Approval	Indicates whether you want to enable learners to skip enrollment approval for content within a program.
Requires Successful Completion	Indicates whether the course or lesson is mandatory. You need to complete mandatory content items to complete the program successfully.
Recognize Course Expiration Dates	Indicates whether Workday recognizes expiration periods on learning content for courses in the context of the program. If you select this check box and the Recognize Previous Completion check box, we recognize previous completions up until the point of expiry. If a learning content is in an expired state, the program won't move to completed until the expired content is completed. If you don't select this check box, but select Recognize Previous Completion, we ignore the expiry and the program moves to completed.
Recognize Previous Completions	Indicates whether the program recognizes previous completions for the content item in the learning transcript of the learner. When you select this check box, you must select one of these options to specify whether to recognize: • All Previous Completions. • Completions that occur on or after the As-of Date. • Completions that occur Within Date Range. When learners complete the content item on the same day that they enroll in a program, the program recognizes the completion even if you: • Don't select Recognize Previous Completions. • Set a Within Date Range value and the completion date is outside the date range. When you select this check box but not Recognize Course Expiration Dates, learning

Option	Description
	content for the course won't expire in the context of the program.

Result

Workday routes the program for review or approval, depending on your *Manage Program* business process and generates a unique reference ID for the program. You can also overwrite the reference IDs with legacy reference IDs using the *Manage Learning Program* web service.

Next Steps

To search for the program, run the Manage Learning Content report.

Related Information

Tasks

Steps: Set Up Competencies on page 122

Steps: Set Up Skills Cloud on page 1852

Enable Skills Cloud on page 1854

Reference

Reference: Learning Content Effective and Non-Effective Dated Fields on page 2027

Workday 2021R2 What's New Post: Program Expiration Rules

View and Edit Learning Content

Prerequisites

Security: These domains in the Learning Core functional area:

- *Learning Access*
- *Manage: Learning Content*
- *Manage: Learning Course Enrollments*
- *Set Up: Learning Catalog*

Context

You can use the Manage Learning Content report to search for learning content, which can include:

- Blended Courses.
- Digital Courses (with Access Type of Requires Enrollment or On Demand).
- Lessons (stand-alone).
- Programs.

You can use the Edit Course task to edit a specific blended or digital course. You can search for a course by either:

- *Topic*
- *Delivery Mode*:
    - *Hybrid* (contains both instructor-led and media lessons).
    - *In-Person* (contains instructor-led lessons only).
    - *Self-Directed* (contains media lessons only).

For courses with hybrid or in-person delivery modes, you can:

- Update a specific version, based on its effective date, or select the current version.
- Add a new version with a different effective date.

You can select the View as Admin button to view content as an administrator and to enable Workday to remember this setting preference. To consume learning content, learning administrators and trainers must select the View as Learner button on the learning reports or access the content through the Learning dashboard.

Steps

1. Run the Manage Learning Content report.
2. View and edit details for learning content. Workday displays 1 of these reports, based on the content type that you select:

<table>
<tr><th>Report</th><th>Enables you to:</th></tr>
<tr><td>View Course</td><td>View and edit a particular version or add a new version of a blended course on the Administrative tab. The Versions section lists all versions where the Manage Course business process has completed.

If you edit non-effective-dated fields, Workday updates the fields on all course versions. Non-effective-dated fields include:
Course Title
Skill
Description
Topics
Inactive
Cover Image
Workday applies effective dating to all other fields on courses. If you edit effective-dated fields in a course version, your changes apply only to that version.
Schedule course offerings from the version that you're viewing. Select More > Schedule.
Update course offerings to the version that you're viewing and apply version labels and notes, if available on that version. Example: When you edit these values on a course version, you can</td></tr>
</table>

Report	Enables you to:

	also update these values on 1 or more offerings:
	• Contacts
	• Cost
	• Expiry Period
	• Units
	Select More > Update Offering to Version to select 1 or more offerings to update.
	Workday updates the selected offerings and adds, removes, or replaces these lesson types:
	• External Content
	• Media
	You can't update these lesson types in the selected course offerings, but you can update the offering version:
	• Instructor-led classroom or webinar lessons.
	• Surveys.
	• Course offerings with lesson-order conflicts.
	• Drill into course offerings on the Offerings grid on the Administrative tab to:
	  • View and edit a course offering.
	  • Enroll your team in a course offering.
	  • Manage the grading and attendance roster.
	  • Drop enrollments.
	  • Manage or view waitlists.
	  • Add a course offering to your calendar.
	• Create course reminders.
	• Run the View Content Equivalency Rules report when there are 1 or more equivalency rules associated with the course.

View Digital Course	• View and edit a digital course. • Enroll your team in a digital course. • Drop enrollments. • Run the View Content Equivalency Rules report. Workday doesn't apply effective dating to digital courses.
View External Lesson	• View a third-party external lesson.

Report	Enables you to:
	• Inactivate or activate an external lesson.
View External Digital Course	• Launch a third-party external digital course. • Enroll your team in an external digital course. • Drop enrollments for your team in an external digital course. • Inactivate or activate an external digital course. You can't play inactive courses. • Mark an external digital course as complete. • Run the View Content Equivalency Rules report.
View Learning Lesson	View and edit internal stand-alone lesson details. You can't edit videos or documents after you submit lessons.
View Learning Program	• View and edit a particular version or add a new version of a program on the Administrative tab. The Versions section lists all versions where the *Manage Program* business process has completed. • View program content items.

From the administrator view, you can also access the AI Summarize Feedback tab to use Generative AI (GenAI) to summarize user feedback comments on courses, lessons, and programs. Note: Feedback summary is not available for external content.

Result

If you update a media file in a digital course, these are the impacts on your learners:

- For learners who have completed the course prior to replacing the media file, the course will remain complete, but the lesson with a new media file within the course will be incomplete. If learners click the View Course Again button, the new media file will be available.
- Learners who have not started the course or are in progress need to complete the lesson with the new media file.

Next Steps

- Manage reminders for your learning content.

  See: Create and Manage Reminders for Learning Content on page 2090.
- Add third-party material to your learning content.

  Concept: Packaged Content on page 2069

Related Information

Tasks

Steps: Set Up Learning Content Description Generation and Revision on page 1971

Reference

2025R1 Feature Release Note: AI Summarization of Content Feedback

Create Learning Equivalency Rules

Prerequisites

- Configure the *Manage Equivalency Rule* business process definition.
- Security: These domains in the Learning Core functional area:
  - *Manage: Learning Content*
  - *Set Up: Learning Catalog*

Context

You can create equivalency rules so you can define learning content as equivalent to 1 or more other content, improving compliance management in your organization. Equivalencies support your curriculum planning and simplify how learners find equivalent content to satisfy learning requirements.

When a learner retakes learning content that satisfies equivalency rules, Workday creates a new equivalent learning record.

When a learner completes an equivalent course, Workday creates:

- An equivalent record for the assigned course using the expiration from the assigned course.
- A retraining record for the assigned course.

Example: You assign a Digital Course A to a learner and, instead, the learner completes a Blended Course B, which is an equivalent course. The learner gets an equivalent record for the Digital Course A, which closes the assignment, creating a retraining record based on the equivalent record rather than the enrollment. Digital Course A will appear in the Required For You slider based on the expiration date of the assigned course (Digital Course A). On viewing Digital Course A, the learner can also view the equivalent Blended Course B.

When learners complete 1 or more content that is equivalent to a particular content, Workday displays an *Equivalency* status on the thumbnail image for that content. We display this status to indicate that learners don't need to complete the content because they've already earned an equivalency from another content. We only display this status when learners haven't interacted with the content. If they enroll in, start, or complete the content, we override the equivalency and update the thumbnail to display 1 of these statuses:

- *Not Started*
- *In Progress*
- *Completed*

Note: If a learner has been mass enrolled into content by a learning administrator, they have a *Not Started* enrollment. If they complete an equivalent content, they satisfy the assignment and Workday removes it from the Required for You worklet. Their enrollment in the original content remains marked as *Not Started* until they complete it or drop it.

When required learning content is due or overdue, or content is due to expire, we display the due date or expiration date and 1 of these statuses:

- *Due*
- *Overdue*
- *Expired*

When an equivalent record is made inactive, it's ignored by Workday and isn't counted.

Steps

1. Access the Create Learning Equivalency Rule task.

2. As you complete the task, consider:

Option	Description
Singular Equivalency Rule	Enables you to add multiple contents into the Source and Target fields.
Group Equivalency Rule	Enables you to make multiple contents equivalent to each other quickly, so learners can gain equivalency in multiple contents.
Source	The learning content that learners must complete to achieve an equivalency in the Target content. Enter a single content item in the row to specify that learners must complete 1 source item in order to generate the equivalency record. Create separate rules of single content items if you want to provide learners with a choice of equivalency options. Enter multiple content items in the same row to specify that learners must complete all source items in order to generate the equivalency record.
Target	The learning content that the learners achieve the equivalency in by completing the Source content.
Two-Way	Indicates that learners can take learning content in the Source or Target fields and achieve an equivalency in either. This option applies only to singular equivalency rules.
Display Equivalency Records on Learning History	Select to display the achieved equivalency in the Learning History section of the Learning tab on the Career profile group. Workday displays a row for each equivalency with a Record Type of *Equivalent Record*.
Display Equivalency Options on Course	Select to display an Equivalent Options section on these reports: • View Course • View Digital Course • View External Digital Course This section indicates whether learners can complete equivalent content instead of the selected content. Learners must complete all content listed under a particular option to earn the equivalency. To make it easier for learners to earn equivalencies, we display the equivalency group option with the least amount of content left to complete first.

Result

Workday routes the learning equivalency rule for review or approval, depending on your *Manage Equivalency Rule* business process configuration.

Next Steps

- Run the Manage Learning Equivalency Rules report to view and edit singular and group equivalency rules in your tenant.
- Run the Manage Learning Content report to search for a particular course that has an associated equivalency rule. Select View Content Equivalency Rules on these reports:
  - View Course
  - View Digital Course
  - View External Digital Course
- Create custom reports using the Learning Equivalency Record report data source to report on:
  - Equivalency records.
  - Related learner and learning content that granted the equivalency.
- Create a report using the Learning Record report data source to report on equivalency records alongside Learning Enrollments.
- Users can run the My Transcript report to view equivalency records in chronological order.

Related Information

Reference

2023R2 What's New Post: Learning Equivalency Retraining

Create Learning Prerequisite Rules

Prerequisites

Security: These domains in the Learning Core functional area:

- *Manage: Learning Content*
- *Set Up: Learning Catalog*

Use your learning catalog to identify the prerequisite rules you want to create.

Context

You can create prerequisite rules that define completion of 1 or more courses or programs as a prerequisite to the enrollment or consumption of other learning content. Prerequisites enable you to manage completion of content in your learning catalog.

Workday replaces the enrollment option with a View Prerequisites button when a learning course or program has related prerequisites that learners must complete before they can enroll in the target content. Workday continues to indicate these prerequisites by displaying a Pending Items button on the target content until learners successfully complete the prerequisite content.

Steps

1. Access the Create Learning Prerequisite Rule task.
2. As you complete the task, consider:

Option	Description
Target	The learning course or program that learners can consume once they complete the required prerequisite items.

Option	Description
Qualifier	Indicates whether learners must either complete or enroll in the prerequisite items.

3. Create rules for the prerequisite content that specify the learning course or program that learners must complete or enroll in before they can consume the target content:

Option	Description
AND	Enter multiple prerequisite items in the same row. Example: Enter *Project Design* and *Project Metrics* in the same row to specify that learners must complete both items before consuming *Project Management*.
OR	Enter each prerequisite item in a separate row. Example: Enter *Project Design* in 1 row and *Project Metrics* in a separate row to specify that learners complete either item before they can consume *Project Management*.

Result

Workday displays details of the rules you've created for the content on the View Learning Prerequisite Rule report.

Next Steps

Run the Manage Learning Prerequisite Rules report to view and edit all prerequisite rules in your tenant.

Create Observational Checklists

Prerequisites

- Configure the *Manage Observational Checklist* business process and security policy in the Staffing functional area.
- Security: *Manage: Observational Checklist* in the Learning Core functional area.

Context

Observational Checklists help you provide a structured framework for assessing your learners. You can create detailed observational checklists and manage them through Get Observational Checklists and Manage Observational Checklist web services and Manage Observational Checklist business process.

You can design comprehensive observational checklists with a clear hierarchy of sections, tasks, and specific evaluation criteria, ensuring consistent and thorough assessments.

Note: Workday doesn’t support adding Observational Checklists as course lessons in learning content. We're targeting to support this in a future release.

Steps

1. Access the Create Observational Checklist task.
2. Enter these values:

Field	Value
Title	A title for the observational checklist.

Field	Value
Description	A description to the observational checklist.
Language	Select a language for the observational checklist. This contributes to an easy and efficient search experience by prioritizing and indexing observational checklists based on language preferences.
Allow Feedback	Select this check box to receive feedback on this checklist.

3. Click Add Section to add sections to the checklist.
4. Enter these values:

Field	Value
Order	Workday displays the unique order for the section. You can edit this field to change the order of the sections.
Title	A unique title for the section.
Description	A description for the section.

5. Click + Add to add a task to the section.
6. Enter these values:

Field	Value
Task Title	A unique title for the task.
Task Description	A description for the task.
Evaluation Criteria	Click + to add title and description for the evaluation criteria.

7. Click + Add to add another task above the existing task.

   You can add a task below the existing task by clicking the 3 dots on a task.
8. Click Save for Later to save the changes if you want to exit the observational checklist without submitting it.
9. Click Submit.

Result

Workday creates the observational checklist, which you can edit to create the revisions for the same checklist.

Configure Learning Content Highlights Rules

Prerequisites

Security: *Set Up: Learning Catalog* domain in the Learning Core functional area.

Context

You can use condition rules for specific learner groups to determine which learning content items display in the Highlights worklet on the Learning dashboard.

Steps

1. Access the Configure Learning Content Highlights task.
2. As you complete the task, consider:

Option	Description
Order	Indicates the order in which the rules apply. When learners are eligible for the same content under different rules, Workday only displays the first instance in the Highlights worklet.
Rule	Select or create a learner group rule for learners within the company or extended enterprise learners.
Display Until	Select a date to indicate when Workday should no longer display the content in the worklet.
Content	Select 1 or more content items to display for each rule, adding a row for each.
Order	In the subsection, select the display order for the content items in the worklet.

Next Steps

Configure the Highlights worklet on the Learning dashboard.

Related Information
Tasks
Configure Dashboard Content

Concept: Expiry Periods for Learning Content

Workday enables you to set an expiry period for courses and programs. For compliance or local regulations, you might need learners to re-enroll in content after a certain amount of time, which you can determine with an expiry period. Expiry periods enable you to manage retraining needs across your organization, based on required learning that originates from:

- Learning campaigns.
- Learning administrator mass enrollment.
- Manager enrollment.

We display an *Overdue* status label on learning content that learners don't complete prior to the expiration date set on the content. You can also remind learners to complete required content or require workers to retake content for multiple reasons, ensuring they receive regular and updated training.

Expiration Date and Expiration Duration

When specifying an expiry period for a course or program, you can select either a:

- Date: The expiration date automatically displays on the learner history after the learner completes their learning content .
- Duration: The expiration duration automatically calculates an expiration date relative to the date that the learner completes their learning content .
- Recurrence Frequency: The expiration recurrence frequency calculates the next expiration date based on the current expiration date and your preferred recurrence frequency. Example: The current expiration date is January 15. You configure the expiry period to recur every 6 months. The next expiration date is July 15.

The expiration date, duration, or recurrence frequency displays on the Administrative tab when you're viewing the content and on the Learning report on the Career profile group.

You can mass reset expiration dates on learning records that have a future expiration date using the Reset Expiration Date on Learning Records task.

To reset expiry periods on completed enrollments to zero, select the check box for 1 or more learning records and clear the Expiry Period value. Workday removes the expiry periods from the selected learning records.

Workday automatically runs a daily background job to recalculate expiration dates on learning records based on your Expiry Period settings. This update doesn't apply to expiration dates you reset manually using the:

- Reset Expiration Date on Learning Records task.
- *Put Learning Enrollment* web service operation.

When loading enrollments using the *Put Learning Enrollment* web service operation, the *Manual Expiration Override* flag indicates whether to:

- Allow the job to override the expiration date. Set the flag to N (false).
- Prevent overrides. Set the flag to Y (true).

When the expiration date is in the past, the background job sets the expiration date to today's date.

Retrain Window

You can configure a retrain window to specify a time period to display retraining content on the Required For You slider, ensuring that learners complete retraining within the defined window.

Workday displays content on the Required For You slider and opens the retrain window on the earliest of these dates:

- Start of retrain window (if configured on the content).
- Course reminder date (if configured).
- Content expiry date.

For content with a Recurrence Frequency expiry period, learners must complete their retraining assignment within the retrain window to view the next expiration date. Once the current expiration date on the course has passed, the current and next expiration dates update in line with the recurrence frequency set on the content.

The Retrain Window recognizes a successful completion for initial assignments and retraining assignments if a learner completes the content when the Retrain Window is open:

- Learners who complete content for the first time inside the Retrain Window receive the next expiration date for their retraining assignment if they successfully complete the content.
- Learners who complete content for the first time outside the Retrain Window receive the current expiration date on their retraining assignment if they successfully complete the content.

Expiration Date Reminders and Statuses

When you view a course or program that has an expiry period, you can configure reminders that automatically notify learners about the expiration date of their completed enrollment. You can configure Workday to send reminders on the expiration date or on a date relative to the expiration period. Workday doesn't send a reminder if the course or program has already expired.

For courses and programs with configured reminders, we display the required learning content on the Required for You worklet when the first reminder triggers, with a status of *Due* and their due date on their content thumbnail images. If learners don't complete the content by the due date, we display an *Overdue* status, to indicate that that the learning content is still available but they need to update their completion.

If there are no reminders, we display the *Overdue* status directly.

Advanced Learning Expiration Rules

When you're creating or editing a learning course or program, you can create learner groups and define expiry period rules that apply to different learner groups. Example: In an organization, office staff is required to take a manual handling course every 2 years but engineers are required to take the course annually. You can set up a learner group for office staff and a learner group for engineers to specify different learning expiration rules.

If a learner doesn't meet the rule conditions of the learner group, the default expiry period of the content applies to their enrollment. If a learner meets multiple rule conditions, the first advanced learning expiration rule in the table will apply to their enrollment.

Related Information

Reference

Workday 2021R2 What's New Post: Program Expiration Rules

2022R2 What's New Post: Fixed Recurring Expiration Dates

Learning Webinar - Assignments: Now and Next - Recording and Materials

Concept: Completion Status for Learning Content

Learning Transcripts

Workday displays a learning transcript for each learner on the Learning report on their Career profile. The Learning History section on this report indicates the completion status for all learning content associated with the learner. Workday only considers a video lesson complete when a learner watches 100% of the content.

Completion Status for Digital Courses

Workday changes the status of digital course enrollments with lessons that aren't required learning to *Completed* once learners complete all mandatory lessons in the course. Update grading and attendance for digital course enrollments with lessons that are required learning to change the status to *Completed*.

Workday doesn't provide completion tracking on all external digital courses. To complete an external digital course for Harvard ManageMentor®, learners must click Mark Complete on the View External Digital Course report.

Workday provides completion tracking on Coursera, LinkedIn Learning™, Pluralsight, Skillsoft, Skillsoft Percipio, Udemy Business, and YouTube courses.

Completion Status for Blended Courses

Workday tracks completion for all media lessons in blended courses, regardless of whether you set Track Attendance or Track Grades on the course offering. When entering time, replace the numerical value instead of deleting it to ensure Workday updates the information.

Workday displays a completion status of *Not Started* before the start date and time of the first instructor-led lesson.

Workday determines the *In Progress* status based on whether you select Track Attendance or Track Grades on the course offering. If:

- Not selected, we display *In Progress* from the start date and time of the first instructor-led lesson until the end date and time of the last instructor-led lesson.
- Selected, we display *In Progress*:
    - From the start date and time of the first instructor-led lesson until the end date and time of the last instructor-led lesson.
    - When an instructor or learning administrator hasn't entered attendance and grading results for individual required lessons and the overall course.

Workday determines the *Completed* status based on whether you select Track Attendance or Track Grades on the course offering. If:

- Not selected, we display *Completed* after the end date and time of the last instructor-led lesson.
- Selected, we display *Completed* when an instructor or learning administrator has entered attendance and grading results for individual required lessons and the overall course, and the end date and time of the last instructor-led lesson are in the past.

Blended Course Outcomes on the Learning History

When learners access the Learning History worklet in the Progress section on the Learning dashboard, Workday displays 1 of these outcomes on the image thumbnails of their completed course enrollments:

Outcome	Description
Completed	Displays when any of these conditions are true: • The primary instructor or a learning administrator has entered an overall *Pass* grade for the learner on the blended course. • A learning administrator selected Provide Course Grade on a media lesson that contains video interactions with the Passing Score percentage value set, and the learner achieves the passing score. • Track Attendance and Track Grades aren't selected on the course offering and the end date and time of the last instructor-led lesson has passed.
Unsuccessful	Displays when any of these conditions are true: • The primary instructor or a learning administrator enters an overall *Fail* grade for the learner. • A learning administrator selected Provide Course Grade on a media lesson that contains video interactions with the Passing Score percentage value set, and the learner doesn't achieve the passing score. • You use an EIB to load course completions.

Completion Status for Internal Stand-Alone Lessons and External Lessons

Workday displays these completion statuses for stand-alone lessons and external lessons:

- *In Progress* when learners start playing the video and pause it.
- *Completed* when learners play the video to the end.

Because you can't enroll in these lessons, we don't display a *Not Started* status.

Completion Status for Programs

Workday determines the overall completion status of program enrollments for individual content items based on these check boxes on the Create Program and Edit Program tasks:

- Recognize Course Expiration Dates
- Recognize Previous Completions
- Requires Successful Completion

Workday tracks the completion status of program enrollments against the mandatory content items within a program. Workday sets the completion status for the enrollment to *Not Started* when:

- A learner doesn't have any previous completions for the mandatory content.
- Recognize Previous Completions isn't selected on the program.

Workday updates the status to *In Progress*:

- When the learner accesses any of the media content.
- From the start date and time of the first instructor-led lesson until the end date and time of the last instructor-led lesson within the last mandatory course.

When a learner successfully completes all mandatory items, Workday:

- Updates the completion status for the enrollment from *In Progress* to *Completed*.
- Sets the completion date to the date on which the learner completed the last mandatory item, based on whether the Recognize Previous Completions check box is selected.

When you select the Recognize Course Expiration Dates check box, Workday recognizes expiration periods on enrollments for courses in the context of the program.

When you also select the Recognize Previous Completion check box, we recognize previous completions up until the point of expiry.

Learners can re-enroll in a program when they complete their previous enrollment for the program.

When a learner successfully completes all mandatory items before enrolling in a program on the same day, Workday updates the completion status to *Completed*.

When a learner unsuccessfully completes a mandatory item due to a failing grade, the program remains *In Progress*. When the learner re-enrolls in the mandatory item and successfully completes it, Workday:

- Updates the completion status of the program to *Completed*.
- Records each course enrollment in the Learning History section on the Learning report on the Career profile.

When you rescind an enrollment for a mandatory course, as part of the *Enroll in Content* business process, Workday changes the program status from *Completed* to *In Progress*.

If you use an EIB to load program completion, the EIB won’t update the completion of the individual content items. It'll load only the program record. To update the completion status of content items within a program, you need to load the course completions separately in a sequence. Example: If Recognize Previous Completions is selected on a program, you load the course completions and then create an enrollment for the program. This would automatically complete the program, based on the last course completion.

Concept: Calendar Message Templates

Calendar message templates in Workday enable you to customize the notifications that learners and instructors receive for learning events. They provide a way to communicate important information consistently and efficiently, enhancing the learning experience. They also save administrators time by automating the notification process. By providing clear and informative messages, templates contribute to a more positive and effective learning experience.

Workday enables the configuration of message templates at the tenant level, applying them to all email invites generated from the Microsoft Outlook and Google Calendar integration. Workday also provides default messages for the templates. You can customize the templates to display specific information in the email subject and body. Workday uses the same templates for both instructors and learners.

Workday lets you create email templates in different languages. To send a calendar invite to learners in the specified language of a course offering, you need to:

- Specify only 1 language on the course offering.
- Enable message template translation for the calendar integration in your tenant.

- Create a message template in the language of the course offering.

Note: Workday doesn't translate report fields to the language on the course offering. Workday recommends that you create separate courses for each of your supported languages and select the translated course when creating the translate learning calendar message template.

Workday doesn't run the Microsoft Outlook and Google Calendar integrations until you configure message templates, preventing you from sending empty calendar invites to learners.

Workday won't require you to reconfigure the calendar message template if you change your integration from Microsoft Outlook to Google or vice versa.

Types of Calendar Message Templates

When a learning event is scheduled or changed, Workday uses the appropriate template to generate and send a calendar invitation to the relevant participants. Workday provides different types of calendar message templates to address various learning scenarios.

- Classroom: Workday triggers this template when a learner successfully enrolls or drops an enrollment with in-person classroom lessons, and when learning administrators cancel enrollments with in-person classroom lessons. Workday also triggers this template when you edit a course offering with in-person classroom lessons.
- Virtual Classroom: Workday triggers this template when a learner successfully enrolls or drops an enrollment containing virtual classroom lessons, and when learning administrators cancel enrollments with virtual classroom lessons. Workday also triggers this template when you edit a course offering with virtual classroom lessons.
- Cancellation: Workday triggers this template only when a course offering is cancelled.

You can customize each template to include relevant details, such as event time, location, and instructor information.

Declining the calendar invite doesn't unenroll a student from the course offering. Students must manually unenroll themselves from course offerings in Workday.

Workday will trigger Classroom or Virtual Classroom message templates if you update these fields in the Edit Course Offering task:

- Additional Information
- Ad Hoc Location Name
- Ad Hoc Location Address
- Ad Hoc Location Room
- Description
- End Date
- Instructor
- Lesson Order
- Login Details
- Make Lesson Mandatory
- Password
- Time Zone
- Title
- Start Date
- Virtual classroom URL

Example: When a learner drops a virtual classroom lesson enrollment, Workday sends a calendar invite with Canceled added to the Subject, and the Body of the email displays the information set for the virtual classroom lesson.

If you're using calculated fields for the message templates, ensure that your Integration System User (ISU) for learning calendar integration has access to the calculated fields. If your ISU doesn't have access to any fields, they won't appear in the email sent to the learners and instructors. If you want to use custom calculated fields for the calendar message template, you need to create calculated fields on the Instructor Led Offering Lesson business object with learning admin access.

New and Updated Calendar Message Templates

Workday applies a new template only to new course offerings. Workday applies a new template to existing course offerings only when you update the course offerings.

Workday applies the updated templates to course offerings when you edit course offerings. Also, Workday sends an updated template in emails to existing enrolled learners and instructors when you update a course offering, and not to learners who enroll or drop enrollments after you update a template.

Example: Create Training Activity Lessons

This example illustrates how to create mandatory training activity lessons for a blended course with a maximum of 10 enrollments and 2 assessors.

Context

You want to create a training activity lesson for warehouse forklift driving for a beginner driver. The training materials include existing PDF documents for the warehouse demonstration manual that the learner must study and a forklift assessment checklist that Assessors A and B use to evaluate the learner's forklift driving. The assessors will use this live assessment to give the learner a *Pass/Fail* for the training activity lesson in Workday.

Prerequisites

- Access the Create Learning Topic task to create the *Manufacturing* topic to categorize your learning content.
- Create learning assessors. See Steps: Set Up Learning Assessors.
- Create any documents that you want to include as training materials.
- Security: These domains in the Learning Core functional area:
  - *Learning Access*
  - *Manage: Learning Content*
  - *Set Up: Learning Catalog*

Steps

1. Access the Create Course task.
2. Select Create Blended Course.
3. Click OK.
4. Enter these values:

Field	Value
Course Title	*Forklift Driving Demonstration*
Skill Level	*Beginner*
Description	*A demonstration of forklift driving.*
Topics	*Manufacturing*
Effective Date	*11/01/2024*
Maximum Enrollment Capacity	*10*
Allowed Assessors	• *Assessor A*

Field	Value
	• *Assessor B*

5. From the Add Lesson menu, select *Training Activity*.
6. Enter these values:

Field	Value
Make Lesson Mandatory	Select this check box.
Lesson Title	*Forklift Driving Demonstration*
Track Attendance	Select this check box.
Training Activity Type	*Demonstration*

7. Click Select Files to upload the demonstration manual.
8. From the Add Lesson menu, select *Training Activity*.
9. Enter these values:

Field	Value
Make Lesson Mandatory	Select this check box.
Lesson Title	*Forklift Driving Assessment*
Track Attendance	Select this check box.
Track Grades	Select this check box.
Grading Scheme	*Pass/Fail*
Training Activity Type	*Assessment*

10. Click Select Files to upload the checklist.
11. Click Submit.

Next Steps

- Access the Schedule Offering report to create a course offering from the Forklift Driving Demonstration blended course with Assessor A and Assessor B as assessors.
- Enroll learners for the Forklift Driving Demonstration blended course and set as a required learning with a due date.
- Assessors can access the Manage Grading and Attendance task to record details for learners who are enrolled in this course offering.

Related Information
Tasks

Create Learning Courses on page 1986

Create Learning Course Offerings on page 1995

Manage Schedules and Grading and Attendance on page 2087

Example: Create a Message Template for Learning Campaigns

Note: We plan to migrate Campaign functionality to Engagement Builder in a future release. Workday recommends that you start using Engagement Builder for greater efficiency and visibility into your engagements. See: ../../../manage-workday/collaboration/engagement-builder/setup-considerations-engagement-builder.dita.

This example illustrates how you can create and use a message template for a learning campaign item.

Context

Andy Fraiser needs to set up multiple learning campaigns targeting Global Modern Services employees. He decides to create a message template to save time.

Steps

1. Access the Create Message Template task.
2. In the Setup section, enter these settings:

Option	Description
Name	*Andy's Enrollment Notification Content*
Notification Type	*Learning Campaigns*

3. Click Next.
4. In the Message section, enter these values:

Option	Description
From Display Name	*Andy Fraiser*
Reply To	*A.Fraiser@GMS.com*
Subject	*Please Enroll for this Online Training*
Body	*Please enroll and complete this required training. You have 14 days to complete this training.* *If you have any questions, please contact Andy Fraiser at A.Fraiser@GMS.com.*

5. Click Next, then Save.
6. Access the Create Campaign task.
7. Enter these settings:

Option	Description
Title	*Health & Safety Update 2019*
Type	*Learning Campaign*
Audience	*San Francisco Employees*
Start Date	*01/02/2019*
End Date	*04/30/2019*

8. Click OK.
9. Click Add Item.
10. In the Item Details section, enter these settings:

Option	Description
Title	*Online Training Alert*
Content Type	*Notification*

11. Click Next.
12. In the Setup section, select *Andy's Enrollment Notification Content* from the Message Template prompt.
13. Click Next.

Result

The message template content automatically populates the text boxes in the Message section for campaign items. Andy can continue to edit content in the text boxes; further edits don't save to the message template.

Example: Set Up Attendance Synchronization to Track Full Attendance

This example illustrates how to set up attendance synchronization to track full attendance only for a virtual classroom lesson.

Context

You've already configured integration with Microsoft Teams or Zoom and you want to track full learner attendance for a virtual classroom lesson on Project Design.

Prerequisites

Set up virtual classroom integration with Microsoft Teams or Zoom.

Steps

1. Access the Edit Tenant Setup - HCM task.
2. Navigate to the Learning section.
3. From the Select Virtual Classroom Integrations prompt, select your Microsoft Teams or Zoom integration.
4. Enter *60* as the value for the Minimum Percentage for Full Attendance field.
5. Enter *0* as the value for the Minimum Percentage for Partial Attendance field.
6. Ensure that the Track Non-Attendance for Virtual Classroom check box remains unselected.
7. Click OK.

Result

- Setting a *0* value for the Minimum Percentage for Partial Attendance means that this field isn't active and Workday won't use it.
- Not selecting the Track Non-Attendance for Virtual Classroom check box means it's inactive and Workday won't use it.
- When there's a record match and:
  - Learner attendance is 60% or more, the Overall Attendance field displays as *Attended*.
  - Learner attendance is less than 60%, the Overall Attendance field displays as *Not Entered*.

Next Steps

Access the Manage Grading and Attendance task to view attendance details for your learners.

Example: Set Up Attendance Synchronization to Track Full and Partial Attendance

This example illustrates how to set up attendance synchronization to track full and partial attendance for a virtual classroom lesson.

Context

You've already configured integration with Microsoft Teams or Zoom and you want to track full and partial learner attendance for a virtual classroom lesson on Project Design.

Prerequisites

Set up virtual classroom integration with Microsoft Teams or Zoom.

Steps

1. Access the Edit Tenant Setup - HCM task.
2. Navigate to the Learning section.
3. From the Select Virtual Classroom Integrations prompt, select your Microsoft Teams or Zoom integration.
4. Enter *60* as the value for the Minimum Percentage for Full Attendance field.
5. Enter *40* as the value for the Minimum Percentage for Partial Attendance field.
6. Ensure that the Track Non-Attendance for Virtual Classroom check box remains unselected.
7. Click OK.

Result

- Not selecting the Track Non-Attendance for Virtual Classroom check box means it's inactive and Workday won't use it.
- When there's a record match and:
    - Learner attendance is 60% or more, the Overall Attendance field displays as *Attended*.
    - Learner attendance is 40% or more, but less than 60%, the Overall Attendance field displays as *Partially Attended*.
    - Learner attendance is less than 40%, the Overall Attendance field displays as *Not Entered*.

Next Steps

Access the Manage Grading and Attendance task to view attendance details for your learners.

Example: Set Up Attendance Synchronization to Track Full, Partial, and Non-Attendance

This example illustrates how to set up attendance synchronization to track full, partial, and non-attendance for a virtual classroom lesson.

Context

You've already configured integration with Microsoft Teams or Zoom and you want to track full, partial, and non-attendance for a virtual classroom lesson on Project Design.

Prerequisites

Set up virtual classroom integration with Microsoft Teams or Zoom.

Steps

1. Access the Edit Tenant Setup - HCM task.
2. Navigate to the Learning section.
3. From the Select Virtual Classroom Integrations prompt, select your Microsoft Teams or Zoom integration.
4. Enter *60* as the value for the Minimum Percentage for Full Attendance field.
5. Enter *40* as the value for the Minimum Percentage for Partial Attendance field.
6. Select the Track Non-Attendance for Virtual Classroom check box.
7. Click OK.

Result

- Selecting the Track Non-Attendance for Virtual Classroom check box means it's active and Workday will use it.
- When there's a record match and:
    - Learner attendance is 60% or more, the Overall Attendance field displays as *Attended*.
    - Learner attendance is 40% or more, but less than 60%, the Overall Attendance field displays as *Partially Attended*.
    - Learner attendance is less than 40%, the Overall Attendance field is displays as *Not Attended*.

Next Steps

Access the Manage Grading and Attendance task to view attendance details for your learners.

Reference: Zoom Limitations for Virtual Classroom Integration

Limitations

Limitation	Description	Recommendation
Licensed users on business, education, enterprise accounts can host only a maximum of 2 concurrent meetings.	If you schedule a third session that overlaps with the first 2 sessions with the same host: • Learners will be unable to join the third session on the scheduled date and time. • The host will be unable to start the third session until one of the earlier sessions concludes. • A cohost will be able to abruptly end the ongoing 2 sessions and start a third session. This limitation can cause significant disruptions for both learners and hosts. To mitigate these issues, Workday adds these to help you manage and optimize the scheduling of virtual classroom sessions, ensuring a seamless experience for all participants: • A new Organizer field on the Schedule Course Offering task. This allows you to select an instructor whose Zoom account will be used to generate a Zoom link. • A critical validation on the Schedule Course Offering task to prevent scheduling conflicts. If you attempt to schedule a virtual classroom session with an organizer with a start date and time that overlaps with another existing session with the same	Workday strongly recommends that you update the course offering and add the lesson level instructor and organizer after you identify an instructor to avoid limitations from Zoom related to concurrent meetings.

Limitation	Description	Recommendation
	organizer as the host, Workday triggers an error prompting you to select an alternate time.	
Only up to 100 requests per Zoom account per day.	If you exceed the limit, Workday fails the integration event.	Workday recommends that you don't use 1 Zoom account to schedule more than 100 virtual classroom lessons per day.

Additional Considerations

Settings	Description
Meeting co-host	To designate someone as a host during the meeting, you need to enable the Co-host option in your Zoom tenant.
Zoom email settings	Zoom automatically sends emails to alternative hosts, whether you enable calendar integration or not. Workday recommends that you disable email settings in Zoom if you enable calendar integration.
Integration system update	If you edit a course offering to update the integration system from Zoom to Microsoft Teams for a virtual classroom lesson, the virtual classroom lesson will still reflect on the Zoom application for the organizer and instructors.
Zoom and Microsoft Teams integration systems	If you use both Zoom and Microsoft Teams integration systems and you add the Organizer class report field to the calendar message template, Workday populates the Organizer field only in Zoom calendar invites and the field remains blank in Microsoft Teams calendar invites. For a course offering with a virtual classroom lesson, if you use Microsoft Teams integration without an instructor and update the integration system from Microsoft Teams to Zoom, the integration event will run and complete but with errors. Workday will create a Zoom meeting link but won't delete the Microsoft Teams meeting ID.

Reference: Microsoft Environments for Workday Learning

Workday Learning supports these Microsoft environments:

Environment	Graph URL
Microsoft 365 Commercial	https://graph.microsoft.com
Microsoft 365 GCC	https://graph.microsoft.com

You can avail Microsoft 365 GCC using Workday's federal moderate environments.

Workday Learning doesn't support these Microsoft environments:

Environment	Graph URL
Microsoft 365 GCC High	https://graph.microsoft.us
Microsoft 365 DoD	https://dod-graph.microsoft.us

Reference: Learning Content Effective and Non-Effective Dated Fields

Learning Courses

Effective Dated Field	Non-Effective Dated Field
• Add Lesson • Advanced Learning Expiration Rules for Workers • Advanced Learning Expiration Rules for Extended Enterprise Learners • Allowed Assessors • Allowed Instructors • Allowed Locations • Cost • Course Number • Contacts • Course Units • Custom Version Label • Default Expiration Rules • Effective From • Effective Until • Enable Auto-Enrollment from the Waitlist • Lessons • Maximum Enrollment Capacity • Minimum Enrollment Capacity • Pricing • Time Value • Total Course Duration • Unlimited Capacity • Version Notes • Version Update Type • Waitlist Capacity	• Competencies • Course Title • Cover Image • Credentials • Description • Disable Express Interest • Display Schema Label to Learners • Exclude from Recommendations • Exclude from Search and Browse • Inactive • Language • Learner • Legacy Course • Requires Enrollment • Security Category • Schema Preview • Skills • Skill Level • Status • Topics • Version Schema

Learning Programs

Effective Dated Field	Non-Effective Dated Field
• Add Content • Advanced Learning Expiration Rules for Workers • Contacts • Content • Cost • Custom Version Label	• Cover Image • Competencies • Description • Exclude from Recommendations • Exclude from Search and Browse • Inactive • Language

Effective Dated Field	Non-Effective Dated Field
• Default Expiration Rules • Effective From • Effective Until • Program Number • Time Value • Total Program Duration • Version Notes	• Learner • Program Title • Requires Enrollment • Security Categories • Skills • Skill level • Status • Topics

FAQ: Attendance Synchronization for Virtual Classroom Integration with Microsoft Teams and Zoom

What do I need to do to use attendance synchronization if I'm already using the Microsoft Teams integration?

1. Give *OnlineMeetingArtifact.Read.All* API permission to the new application in the Microsoft Azure portal.
2. Access the Learning section of the Edit Tenant Setup – HCM task. From the Select Virtual Classroom Integrations prompt, select the Microsoft Teams integration you want to use.
3. Enter values for these fields:
    - Minimum Percentage for Full Attendance
    - Minimum Percentage for Partial Attendance
4. Select the Track Non-Attendance for Virtual Classroom check box.

What do I need to do to use attendance synchronization if I'm already using the Zoom integration?

1. Add these scopes to your server-to-sever OAuth application:
    - *meeting:read:list_past_participants:admin*
    - *meeting:read:list_past_instances:admin*
2. Access the Learning section of the Edit Tenant Setup – HCM task. From the Select Virtual Classroom Integrations prompt, select the Zoom integration you want to use.
3. Enter values for these fields:
    - Minimum Percentage for Full Attendance
    - Minimum Percentage for Partial Attendance
4. Select the Track Non-Attendance for Virtual Classroom check box.

I've configured the attendance synchronization functionality but I don't want to track attendance. What do I do?

1. Populate zero as the value for these fields on the Edit Tenant Setup – HCM task:
    - Minimum Percentage for Full Attendance
    - Minimum Percentage for Partial Attendance

	2. Ensure that you haven't selected the Track Non-Attendance for Virtual Classroom check box.
How is attendance marked for learners who don't use the specific Microsoft Teams or Zoom link to join the meeting?	Enrolled learners who don't join the Microsoft Teams or Zoom meeting themselves must have their attendance record manually added by the administrator using the Manage Grading and Attendance task.
Does Workday always update attendance details for learners?	If an Administrator manually enters values in the Attendance Duration or Overall Attendance fields, Workday doesn't automatically update them. Also, when the email for an attendance record doesn’t match with the primary work email of an enrolled learner, Workday doesn’t update the attendance details.
Who controls the information displayed in the Attendance Records from Integration section of the Manage Grading and Attendance task?	This section displays all records for learners who attended the virtual classroom lesson using the Microsoft Teams or Zoom link. When attendance displays as Not Entered in the Enrolledsection, the instructor must verify and enter attendance manually using information from the Attendance Records from Integration section. • Microsoft Teams and Zoom send Attendee Display Name and Attendee Duration (Minutes) details to Workday. • Workday controls Attendee Percentage and Automatically Matched details. • Workday also receives email address details for learners from Microsoft Teams and Zoom, but keeps this personal information privately in the background. If an external learner hasn't enrolled in the virtual classroom lesson, but they attended it using a forwarded Microsoft Teams or Zoom link, their name, attendance percentage, and attendance duration display in the Attendance Records from Integration section, but not in the Enrolled section. Workday receives attendance details only for a completed virtual classroom lesson from Microsoft Teams and Zoom once the batch job runs. Even though the job runs hourly, it only records attendance data from Microsoft Teams and Zoom meetings that have concluded for 4 hours to the integration run. Workday displays the *Attendance records for your virtual classroom aren't available yet* error message if the hourly job hasn’t run yet.
How does Workday manage email addresses for virtual classroom lessons?	If a learner registers for a course offering and attends using a Microsoft Teams or Zoom link, Workday retrieves their email addresses and attendance data from Microsoft and Zoom. Workday

	checks that the primary work email on the Workday account matches this email. • If it matches, Workday marks it as *Matched* by selecting the check box under the Automatically Matched column. • If it's different, Workday marks it as *Unmatched* by not selecting the check box under the Automatically Matched column.
How does Workday round attendance percentages for virtual classroom integration with Microsoft Teams and Zoom?	• If a learner joins for less than 1% of the time on a meeting, they'll automatically receive an attendance percentage of 1%. • If a learner joins for more than 1% of the time on a meeting, the percentage remains its true value, and Workday won't round it up or down.
How do I fix a failed integration process event?	The integration launches when you perform the *Manage Course Offering* rescind event. If an integration process event fails within a rescind event, the Microsoft Teams meeting desynchronizes between the Workday and Microsoft Teams, as the integration couldn't update the meeting details in the Microsoft Teams' tenant. Access the Edit Course Offering task to edit the lesson in order to fix this issue, and the business process will execute the integration. The solution is the same for a failed Zoom integration process event.
How does Workday match a learner who joins a meeting by phone rather than an email link?	We don't match attendees using their phone number. If an attendee joins a meeting using a phone number and no email address, we can't match them to an enrolled learner in the virtual classroom lesson.
Can I assign any instructor to the Microsoft or Zoom integration?	Only use instructors who are users within Microsoft Entra for Microsoft integration. Only use instructors who are in your Zoom tenant for Zoom integration. This is a Microsoft and Zoom restriction and not something that Workday can control.
How can I purge attendance data for a learner?	You can filter the Virtual Classroom Attendance Record report data source to display specific names and attendance records. Use it in the Purge Person Data task to purge: • Display names and email addresses for your virtual classroom lessons. • Data for unmatched learners by using the new Virtual Classroom Attendance Record business object to create a custom report.
How does Workday track attendance details for a learner whose primary work email in Workday doesn't match with the email they used to join the	If a learner displays in the Enrolled section but their Attendance is marked as *Not Entered*, there's no attendance duration recorded, and the Automatically Matched column remains unchecked. This means that their email doesn't match with the

virtual classroom meeting in Microsoft Teams or Zoom?	work email they've listed on their Workday account. The Attendance Records from Integration section displays a record for this learner with Attendance Duration and Attendee Percentage calculated because they attended using a personal email ID. When Workday extracts all learner records for the virtual classroom lesson, this learner's records are included. The Automatically Matched column is blank because they used personal email ID, so the instructor or administrator must manually verify and enter their attendance.
How does Workday manage learners that attend using a display name instead of an email ID?	If a learner displays in the Enrolled section, but their Attendance Default is marked as *Not Entered*, there's no recorded attendance duration for them and the Automatically Matched column remains unchecked, indicating there's no match with their registered work email on Workday. The Attendance Records from Integration section displays no record for that learner. They might have attended the virtual classroom lesson using a Microsoft Teams or Zoom link on their mobile or the Teams or Zoom Mobile application using a different display name. The instructor or administrator must verify what display name the learner used and manually enter their attendance. This covers learners who attend virtual classroom lessons as guest users who don't sign in to Microsoft Teams or Zoom.
What's the time limit for rescheduling a virtual classroom lesson?	There's no time limit, but as good practice, and in order to avoid issues with attendance tracking, Workday recommends that you reschedule a virtual classroom lesson at least 24 hours before it's due to start.
Can I reuse a previously generated Zoom or Microsoft Teams meeting URL?	As best practice, and in order to avoid issues with attendance tracking, Workday recommends that you don't reuse a previously generated Zoom or Microsoft Teams meeting URL.
Can I set an instructor as a co-organizer of a virtual classroom instructor-led lesson for an existing course offering for the Microsoft Teams integration?	For existing course offerings with a virtual classroom instructor-led lesson where you've already added an instructor at lesson level, you must make a minor change to the lesson title or description so that the Microsoft Teams integration is triggered and the new changes are picked up in order to grant co-organizer privileges to the instructor. Example: Add a special character such as a quotation mark to the title.
How can I access breakout rooms through my browser when I use Microsoft Teams integration?	The breakout rooms button is only available through the Microsoft Teams app. It's not available when accessing Microsoft Teams through a browser.
Can I set any instructor as co-organizer for the Microsoft Teams integration?	When creating or editing course offerings, you can set any instructor as co-organizer for the Microsoft Teams integration as long as they're registered in Microsoft Entra. Assigning the presenter or co-organizer role to users who aren't registered

	in Microsoft Entra isn't currently supported by Microsoft.
Can I set any instructor as co-host for the Zoom integration?	An organizer is always the host for a virtual classroom lesson with the Zoom integration. When creating or editing course offerings, you can set any instructor as a co-host or alternative host for the Zoom integration if they're users within Zoom. To designate someone as a host during the meeting, you need to turn on the Co-host option in your Zoom application.
Can I connect multiple Zoom accounts to a single Workday tenant?	Yes. You need to create a unique integration system for every Zoom account. The Account ID field in the integration systems will reference the individual Zoom accounts.
Does the Zoom integration authenticate the meeting participants and webinar attendees by default?	No. You need to enable the Only authenticated meeting participants and webinar attendees can join meetings and webinars option in the Zoom console to authenticate the participants. Also, ensure that all users for the integration are in a group. Example: Default mailbox on integration system and all instructors.
How can I best manage attendance data so that it accurately reflects time spent by a learner in breakout rooms?	Microsoft currently doesn't support attendance data from breakout rooms as part of its graph API, which this integration consumes. This limitation means that Workday doesn’t receive details from Microsoft on the amount of time that learners spend in breakout rooms. Example: • A virtual classroom offering is scheduled from 8-9 am. • A learner joins the main meeting at 8 am. • They join the breakout room at 8:15 am and stay for 30 minutes. • They leave the breakout room and rejoin the main meeting at 8:45 am. • They stay in the main meeting for the remaining 15 minutes of the lesson and then leave the virtual lesson. The attendance data that Workday receives from Microsoft Teams includes an attendance duration of 30 minutes, made up of 15 minutes on the main meeting at the beginning and 15 minutes again at the end. It doesn’t factor in the 30 minutes spent in the breakout room so the learner only receives a 50% attendance, which is incorrect. We recommend that you log into Microsoft Teams and manually download the attendance report. The attendance report provided on Microsoft Teams user interface contains the learner’s attendance data from the breakout room. Use the Manage Grading and Attendance task in Workday to manually update the learner’s attendance.

	Zoom supports attendance data from breakout rooms and the data will be used to calculate attendance.
Does attendance synchronization for a lesson occur immediately after a meeting ends?	Workday receives attendance details only for a completed virtual classroom lesson from Microsoft Teams and Zoom once the batch job runs. Even though the job runs hourly, it only records attendance data from Microsoft Teams and Zoom meetings that have concluded for 4 hours to the integration run.
How does Workday calculate the Attendance Duration Percentage of a learner?	Workday calculates the Attendance Duration Percentage of a learner using this formula: Attendance Duration Percentage of a Learner = (Attendance Duration of the Learner)/(Actual Duration of VILT Lesson) x 100. • The actual duration of the VILT lesson is from the Workday Lesson Start Time to the Last Instructor Leave Time. • The attendance duration of a learner is the duration between Attendee End Time and Attendee Start Time. • Logic to calculate the Attendee Start Time: If the attendee joins the VILT lesson at or before the scheduled Workday Lesson Start time, the Attendee Start Time is equal to the Workday Lesson Start Time. If the attendee joins the VILT lesson after the scheduled Workday Lesson Start time, the Attendee Start Time is the actual time the attendee joined the VILT lesson. • Logic to calculate the Attendee End Time: If the attendee leaves the VILT lesson at or after the Last Instructor Leave Time, the Attendee End Time is equal to the Last Instructor Leave Time. If the attendee leaves the VILT lesson before the Last Instructor Leave Time, the Attendee End Time is the actual time the attendee left the VILT lesson. If no instructor joins the VILT lesson, Workday replaces the Last Instructor Leave Time with Workday End time for the lesson.

FAQ: Microsoft Outlook Integration with Workday Learning

What can I expect from integrating Workday Learning with Microsoft Outlook?	You must create just 1 set of login credentials for the new application and enter these credentials in the Workday tenant. Workday securely stores these credentials, and only users who have access to the Workday tenant setup can view the login credentials. Microsoft Outlook creates calendar invites in a single mailbox. Attendees on the calendar invites receive invitations by email.

Will the application send emails using information from my Microsoft tenant?	This application will only be given *Calendars.ReadWrite* permission and will only read and write calendar events to a single mailbox that you can configure. Workday will not retrieve any other information from your Microsoft tenant. The only information from your Microsoft tenant that Workday will store are the UUIDs for the calendar events that are created. See Configure Application Access Policy and Limit Application Permissions to Specific Exchange Online Mailboxes to configure policy rules using Microsoft Powershell to restrict ReadWrite access to one mailbox.
Who manages the application?	Workday builds the application in partnership with Microsoft. The application runs on the same platform that the rest of your Workday tenant runs on. Workday owns and manages the platform.
Can the application retrieve or read information from our 0365 tenant?	The application won't retrieve information from your 0365 tenant. Workday is the source of all the information about the events and the attendees. The application is simply syncing this information to your 0365 tenant and will only ever read back or update information that originates in Workday.
Who will have access to the application?	Workday has a strict data privacy system and restricts access to customer data based on purpose. For information on privacy and compliance, see Workday Community.
For how long does Workday store information from my 0365 tenant?	The information originates in your Workday tenant. The only information that Workday stores from your 0365 tenant is the access credentials and a unique identifier for the calendar events the application creates. You own the data, and Workday will store it until you stop using the service or you ask Workday to delete it.
What is a Client Secret?	A Client Secret is a secret known only to the application and the authorization server. In this case, it's between Workday and your 0365 tenant. It is part of the OAuth authentication standard that is being used by Microsoft to secure access to your 0365 data.

Troubleshooting: Learning Content Access

Learners can't access new topics.

Cause: You didn't add the learners to the relevant security group.

Solution:

Steps

Security: *User-Based Security Group Administration* domain in the System functional area.

1. Access the Assign User to User-Based Security task.
   a) Add the learners to the security group when you create new topics. See: ../../../authentication-and-security/configurable-security/security-groups/user-based-security-groups/dan1370796695367.dita.
   b) Add the security group to the *Learning Access* domain.
2. ../../../authentication-and-security/configurable-security/security-change-control/dan1370796405018.dita.

Learners access content that's not appropriate to them.

Cause: Your segmented security configuration for the *Learning Access* domain is incorrect.

Solution:

Steps

Security: *User-Based Security Group Administration* domain in the System functional area.

1. Access the Domain Security Policies for Functional Area report.
2. Select the Learning Core functional area.
3. Remove the learner from all unconstrained security groups on the *Learning Access* domain.

Learning administrators can't view learning content.

Cause: Learning administrators only have access to the *Set Up: Learning Catalog* domain.

Solution:

Steps

1. Access the Domain Security Policies for Functional Area report.
2. Edit Domain Security Policies.
3. Add learning administrators to the *Learning Access* domain.

Related Information
Concepts
Setup Considerations: Learning Content on page 1947
Tasks
View and Edit Learning Content on page 2005
Steps: Manage Learning Content on page 1969

Troubleshooting: Microsoft Outlook Calendar for Learning

Outlook Calendar integration isn't running or displays authentication error messages.

When you configure the Outlook Calendar integration, the integration runs every 15 minutes so the invites should send 20-30 minutes after the event, but Workday isn't sending invites or displays authentication error messages such as:

- *Graph API refuses to authenticate to provide Authorization Token. Please check credentials passed to Learning Calendar integration are valid.*
- *Unable to retrieve token to authenticate to Microsoft. Not processing Calendar Events, Audit skipped.*

Cause: The credentials for Microsoft Azure are incorrect.

Solution:

Steps

1. When registering a new application in the Microsoft Azure portal, ensure you enter the Secret Key Value rather than the Secret ID.
2. Ensure the tenant name that you enter for the Tenant ID field ends with *onmicrosoft.com*. This is the tenant name used in the Edit Tenant Setup - HCM configuration. Example: If your company is called ABCinc, then your tenant name should be *abcinc@onmicrosoft.com* or similar.

Outlook calendar integration displays an invalid user error message.

The Outlook calendar integration displays this error message: *The requested user 'example@myworkday.com' is invalid*.

Solution: Update the email address for the mailbox in your Microsoft tenant. Example: If your company is called ABCinc, then your email address should be *mailbox@abcinc.com* or similar.

Steps

Security: These domains in the Learning Core functional area:

- *Public Reporting Items*
- *Set Up: Learning Catalog*

1. Access the Edit Tenant Set Up – HCM task.
2. Under the Learning Calendar Integration section, remove the invalid Mailbox parameter value.
3. Add a new mailbox and select a Restricted Environment.
4. Click OK.

Troubleshooting: Microsoft Outlook and Google Calendar for Learning

The Learning Calendar Integration Status report in the Production tenant doesn't display the number of invites ran and sent in the past 24 hours.

Solution: In the Production tenant, don't populate multiple environments for Restricted to Environment in the Edit Tenant Setup – HCM task. To restrict learning integration parameters to multiple environments, create separate rows for each environment.

Steps

Security: These domains in the Learning Core functional area:

- *Public Reporting Items*
- *Set Up: Learning Catalog*

1. Access the Edit Tenant Set Up – HCM task.
2. Under the Learning Calendar Integration section, for all parameters, retain only *Production* and remove other environments.

Cloud Connect for Learning

Steps: Set Up Integration System User Security for Cloud Connect for Learning

Prerequisites

Security: These domains in the Cloud Connect for Learning functional area:

- *Cloud Connect for Learning Service*
- *Manage: External Tracking Data*

- *Set Up: External Content*
- *Integration Security* domain in the Integration functional area.
- *Security Configuration* domain in the System functional area.

Context

All Cloud Connect for Learning integrations require an Integration System User (ISU) and Integration System Security Group (ISSG). ISUs must be unique across all integrations. It's Workday policy to use an ISU with only the appropriate access for integration purposes. Administrators shouldn't configure any integration security.

Steps

1. If the required domains aren't enabled, enable all the domains.

   Example: Follow these steps to enable the *Cloud Connect for Learning Service* domain:

   a) Access the View Domain report.
   b) Select the *Cloud Connect for Learning Service* domain from the Domain prompt.
   c) Click the magnifying glass icon next to Domain Security Policy. If the domain is not enabled, the status will be Suspended - Policy not enabled.
   d) On the View Domain Security Policy report, from the related actions menu of the Cloud Connect for Learning Service, select Domain Security Policy > Enable.
2. Access the Create Integration System User task to create an ISU.
   - Workday recommends using *<Content Provider>_Learning_ISU* for the user name.
   - Select the Do Not Allow UI Sessions check box to prevent the ISU from signing into Workday through the user interface
3. Access the Create Security Group task to create an ISSG.
   - Select *Integration System Security Group (Unconstrained)* for Type of Tenanted Security Group.
   - Workday recommends using *ISSG_Cloud_Connect_For_Learning* for the user name.
   - Select the newly created *<Content Provider>_Learning_ISU* for Integration System Users.
4. From the Related Actions menu of the newly created ISSG, select Security Group > Maintain Domain Permissions for Security Group.
5. Add these domains to the Report/Task Permissions section with *View* and *Modify* access, and Integration Permissions section with *Put* and *Get* access:
   - *Cloud Connect for Learning Service*
   - *Set Up: External Content*
   - *Set Up: Learning External Content Integrations*
6. Run the Activate Pending Security Policy Changes task.

Result

Workday assigns the integration system user as part of the Cloud Connect for Learning security group.

Next Steps

Configure external content for third-party providers.

Related Information

Tasks

Configure External Content on page 2051

Steps: Set Up External Tracking on page 2046

Reference

Reference: External Content Provider Configurations on page 2056

Reference: External Content Provider Configurations on page 2056

Examples

Troubleshooting: Configure Cloud Connect for Learning on page 2062

2022R1 What's New Post: Cloud Connect for Learning: Completion Tracking for LinkedIn Learning and Udemy Business

2023R1 What's New Post: OpenSesame Content Import and Tracking

https://community.workday.com/node/1171474

Steps: Set Up Cloud Connect for Learning Using Cloud Connect for Learning Platform

Prerequisites

Note: See Concept: Cloud Connect for Learning Integration Methods to learn about the various integration methods and their benefits.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- Set up Workday Learning. See: Steps: Set Up Learning.
- To enable this feature, you might need to take additional steps to set up Media Cloud based on your organization's subscription service agreement. For more information, see Getting Started with Workday Media Cloud.
- Ensure that you have an active account with the external provider.
- Check if your content provider is in the CCL platform. Workday recommends you to set up CCL for your content provider in the CCL platform if your provider is already available in the CCL platform. See Reference: Content Providers Using the CCL Platform to Integrate With Workday Learning for the list of content providers who are using the CCL platform.
- Create an Integration System User (ISU). ISUs must be unique across all integrations.
    - If you're new to CCL or configuring a new content provider, create a new ISU. See Steps: Set Up Integration System User Security for Cloud Connect for Learning.
    - If you have set up a CCL integration with a content provider previously, Workday will display the ISU you configured for the existing CCL integration in the Configure Cloud Connect for Learning task. If you've used the previously created ISU in a different integration, create a new ISU. See Steps: Set Up Integration System User Security for Cloud Connect for Learning.

- Enable these security domains and grant *View* and *Modify* permissions for reports and tasks and *Get* and *Put* permissions for integrations:
  - The *Set Up: External Content* domain in the Cloud Connect for Learning functional area.
  - The *Cloud Connect for Learning Service* domain in the Cloud Connect for Learning functional area.
  - The *Set Up: Learning External Content Integrations* domain in the Learning Core functional area.

Context

When you set up Cloud Connect for Learning, you can import content from the third-party providers into your tenant, enabling you to deliver rich and engaging playback experiences.

The content catalog provides you with the ability to search for external content and related materials from these providers. Catalog listings include titles, descriptions, and other metadata to help you select which content to make available for customer consumption in Workday.

For users that don't set up Cloud Connect for Learning, including customers, administrators, and other implementers who configure the Workday tenant for their organizations:

- No third-party content will be imported into Workday Learning.
- Administrators can't access configuration tasks.
- Learners can’t view or access third-party content in learning catalogs.

Workday doesn't control and isn't liable for information presented in external content. The views and statements made in external content represent the views of the author or content creator, and not the views of Workday. If you find any of this content offensive or inappropriate, contact the content creator or content service provider, or stop viewing the content.

For a use case related to this topic, see ../../../use-case-library/use-case--set-up-cloud-connect-for-learning.dita in the Use Case Library.

Note: Don't configure Cloud Connect for Learning on a Gold tenant.

Steps

1. Enable the Cloud Connect for Learning functional area.

   See: Steps: Enable Functional Areas and Security Policies.
2. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   On the Innovation Services Opt-In task, select the Cloud Connect for Learning service in the Learning category and click OK.

   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.
3. Access the Configure Cloud Connect for Learning task.
4. From the Content Provider prompt, select the content provider you want to set up.
5. Access the *Set Up Content and Content Provider* step.

   Enter these values:

Option	Description
Inactivate Content Provider	This is optional. Select this check box only if you want to deactivate the integration with the content provider.
Integration System User (ISU)	Select your newly created ISU. Note: You can use an ISU only for one integration. If you need to set up integrations with multiple content providers, set up separate ISUs for them.

Option	Description
	If you have any issues with the ISUs, see Troubleshooting: Configure Cloud Connect for Learning.
Requires Enrollment	Select this check box if content from this content provider requires enrollment.
Exclude from Recommendations	Workday populates these content container worklets on the Learning dashboard with recommendations for relevant learning content: • Based on Your Interests • Based on Your Skills to Develop • Most Popular • Popular in Your Role • Recently Added • Recommended for You • You Might Also Be Interested In Workday also includes learning recommendations on these reports: • Opportunity Graph (in the Popular for This Role section) • View Competency Select this check box to exclude the content from this content provider from the results.
Exclude from Search and Browse	Select this check box to exclude content from this content provider from appearing in the Browse Learning Content report and global search results. If you've customized the Browse Learning Content report for your company, Workday recommends that you manually update the *Exclude from Search and Browse filter* on pre-existing reports.
Import External Vendor Skills	Select this check box to import external content skills when you have an active account with a content provider who supports skills.
Opt-Out of Synonymous Skills	Select this check box to disable synonymous skills matching.
I agree to migrate this content provider to the CCL platform	This check box is displayed only if you are migrating from a legacy content provider integration and are accessing the Configure Cloud Connect for Learning task for the first time. Select this checkbox to successfully configure settings for your content provider in the CCL platform.

Option	Description
	Workday will display the *Manage Content Catalog* and *Manage Credentials* steps for you only if you select this check box.

6. Click Next.
7. Access the *Manage Content Catalog* step.

   Select a default learning topic.

   If you've set up a CCL integration with the content provider previously, Workday will display the topics and tags that were mapped previously. If you're configuring CCL for a content provider for the first time, you'll be able to configure the topic-tag mapping after you complete the Configure Cloud Connect for Learning task and the content provider imports content into your tenant. See Next Steps.
8. Access the *Manage Credentials* step.

   Enable Generate Credentials.

   Workday will display these:

   - Auth URL
   - Client ID
   - Client Secret
   - Content URL
   - Tracking URL

   Take note of Client Secret. You'll need this value for configuring tracking and importing content in the external content provider's platform. If you lose it, you'll need to generate new credentials using Regenerate Credentials.

   If you've set up a CCL integration with the content provider previously, you don't need to generate credentials. Workday will display your current credentials in this page.
9. Access the *Conclusion* step.

   Verify the settings and click OK.

Next Steps

- Contact your content provider to complete the content import.

  Your content provider has to import the content to your tenant to complete the content import.

  Note: After the content provider imports the content to Workday, Workday has to index the content. For production environments, indexing can take up to 12 hours, and for non-production environments, indexing can take up to 24 hours.
- (Optional) Configure topic and tag mappings.
  1. After the content provider imports content to your tenant, access the Configure Cloud Connect for Learning task.
  2. Access the *Manage Content Catalog* step.
  3. In the Topic Mapping grid, add rules to enable Workday to map tagged third-party content to learning topics in your tenant. As you complete the grid, consider:

Option	Description
Order	Workday resolves the mapping rules in the order that you specify. If it can't resolve any of the rules, it maps the content to the Default Learning Topic.

Option	Description
Topics	Select 1 or more learning topics to associate with the content.
Tags	Select 1 or more tags that are already associated with the third-party content. To configure a new topic and tag mapping, ensure that you've listed at least 1 tag in the mapping rule row. When you list multiple tags in the same row, Workday applies *And* logic when evaluating the rule. Example: You create a rule that maps Learning Topic A to Tags 1 and 2 in the same row. A piece of content must have at least Tags 1 and 2 to map to Learning Topic A. Content 1 has Tags 1, 2, 3, so it maps to Learning Topic A. You can create an *Or* relationship by creating multiple mapping rules for the same topic and specifying different tags in each row. Example: You create a rule mapping Learning Topic B to Tag 1 and a separate rule mapping Learning Topic B to Tag 2. Content 1 must have either Tag 1 or Tag 2 to map to Learning Topic B. Order matters when using the *Manage Content Catalog* step in the Configure Cloud Connect for Learning task, as Workday resolves topic mapping in the order that you specify. Example: Content 1 has Tags 1,2,3,4, which are mapped in order: Example 1: • Learning Topic A to Tag 4. • Learning Topic B to Tags 1,2,3. • Content 1 maps to Learning Topic A. Example 2: • Learning Topic B to Tags 1,2,3. • Learning Topic A to Tag 4. • Content 1 maps to Learning Topic B.

4. Access the *Conclusion* step.

   Revise the topic and tag mapping.
5. Click OK.

- You can use a single topic across multiple content providers.
- When you associate learning topics with external content, Workday applies the topics to the content immediately. Any topic-based segmented security that restricts access to the content also applies with immediate effect. Updates to the Topic facet in Learning search results can take up to 6 hours. Ensure that you allow the appropriate amount of time to pass before verifying that Workday maps the external content to the topics in your tenant.

Related Information

Concepts

Concept: Learning Topics on page 1901

Concept: Security in Learning on page 1916

Setup Considerations: Segmented Security for Learning on page 1905

Concept: Cloud Connect for Learning Integration Methods on page 2054

Reference

Reference: Content Providers Using the CCL Platform to Integrate With Workday Learning on page 2061

FAQ: Cloud Connect for Learning on page 2063

Examples

2025R1 Feature Release Note: Go1 Available in the CCL Platform

2025R1 Feature Release Note: O'Reilly Available in the CCL Platform

2025R1 Feature Release Note: Emtrain Available in the CCL Platform

2025R1 Feature Release Note: Big Think Available in the CCL Platform

2025R1 Feature Release Note: Intuition Available in the CCL Platform

2025R2 Feature Release Note: LinkedIn Available in the CCL Platform

2025R2 Feature Release Note: OpenSesame Available in the CCL Platform

2025R2 Feature Release Note: Speexx Available in the CCL Platform

2025R2 Feature Release Note: Udemy Available in the CCL Platform

Troubleshooting: Configure Cloud Connect for Learning on page 2062

Steps: Set Up Cloud Connect for Learning Using Legacy Tasks

Prerequisites

Note: See Concept: Cloud Connect for Learning Integration Methods to learn about the various integration methods and their benefits.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- Set up Workday Learning. See: Steps: Set Up Learning.
- To enable this feature, you might need to take additional steps to set up Media Cloud based on your organization's subscription service agreement. For more information, see Getting Started with Workday Media Cloud.
- Ensure that you have an active account with the external provider.

- Enable these security domains and grant *View* and *Modify* permissions for reports and tasks and *Get* and *Put* permissions for integrations:
  - The *Set Up: External Content* domain in the Cloud Connect for Learning functional area.
  - The *Cloud Connect for Learning Service* domain in the Cloud Connect for Learning functional area.
  - The *Set Up: Learning External Content Integrations* domain in the Learning Core functional area.

Context

When you set up Cloud Connect for Learning, you can import content from the third-party providers into your tenant, enabling you to deliver rich and engaging playback experiences.

To enable content provided by these third-party content providers in your tenant, you must maintain a separate subscription with them directly. The content catalog provides you with the ability to search for external content and related materials from these providers. Catalog listings include titles, descriptions, and other metadata to help you select which content to make available for customer consumption in Workday.

For users that don't set up Cloud Connect for Learning, including customers, administrators, and other implementers who configure the Workday tenant for their organizations:

- No third-party content will be imported into Workday Learning.
- Administrators can't access configuration tasks.
- Learners can’t view or access third-party content in learning catalogs.

Workday doesn't control and isn't liable for information presented in external content. The views and statements made in external content represent the views of the author or content creator, and not the views of Workday. If you find any of this content offensive or inappropriate, contact the content creator or content service provider, or stop viewing the content.

For a use case related to this topic, see Use Case: Set Up Cloud Connect for Learning Using Legacy Tasks in the Use Case Library.

Steps

1. Enable the Cloud Connect for Learning functional area.

   See: Steps: Enable Functional Areas and Security Policies.
2. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA customers.

   On the Innovation Services Opt-In task, select the Cloud Connect for Learning service in the Learning category and click OK.

   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.
3. Create an Integration System User (ISU).

   See: Steps: Set Up Integration System User Security for Cloud Connect for Learning.
4. Access the Configure External Content Provider task.
   - Ensure that the integration system security group from this task includes the user configuring your integration system and your integration system user and that it has *View* and *Modify* access to Report/task permissions and *Get* and *Put* access to integration permissions on these domains:
     - The *Set Up: External Content* domain in the Cloud Connect for Learning functional area.
     - The *Set Up: Learning External Content Integrations* domain in the Learning Core functional area.
   - If your content provider supports channels, activate the channels you want to make available in your tenant for a content provider. See Reference: External Content Provider Configurations.

5. Configure External Content.
   Enable Workday Learning to include the third-party content you configured.
6. Set up external tracking.
   See: Steps: Set Up External Tracking.

Result

You can now import content from these third-party providers into your tenant and add them to your learning catalog.

Related Information

Concepts

Setup Considerations: Learning Content on page 1947

Concept: Cloud Connect for Learning Integration Methods on page 2054

Tasks

Configure External Content on page 2051

Reference

Reference: External Content Provider Configurations on page 2056

FAQ: Cloud Connect for Learning on page 2063

Examples

Troubleshooting: Configure Cloud Connect for Learning on page 2062

Available Innovation Services – Service Descriptions and Exhibits

2022R2 What's New Post: Cloud Connect for Learning: Content Import and Tracking for Coursera

2022R2 What's New Post: Cloud Connect for Learning: Content Import for Pluralsight

2022R1 What's New Post: Cloud Connect for Learning: Completion Tracking for LinkedIn Learning and Udemy

2022R2 What's New Post: Completion Tracking for Pluralsight in Cloud Connect for Learning

2023R1 What's New Post: OpenSesame Content Import and Tracking

Go1 Content Import and Tracking

Steps: Set Up Public Learning Content

Prerequisites

Note: Workday plans to retire Content Cloud YouTube integration in a future release.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- Set up Workday Learning. See Steps: Set Up Learning.
- To enable this feature, you might need to take additional steps to set up Media Cloud based on your organization's subscription service agreement. For more information, see Getting Started with Workday Media Cloud.

Context

Public Learning Content provides you with a catalog to search for external content, and related materials from Workday and third-party content providers. Catalog listings include titles, descriptions, and other metadata to help you select which content to make available for customer consumption in Workday. When you set up Public Learning Content, you can import content from YouTube into your tenant, enabling you to deliver rich and engaging playback experiences.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA customers.

   On the Innovation Services Opt-In task, select the Public Learning Content (Do Not Use) service in the Learning category.

   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.
2. Access the Configure External Content Provider task.

   Activate the channels you want to make available in your tenant for a content provider. See Reference: External Content Provider Configurations on page 2056.

   - Security:
     - The *Set Up: External Content* domain in the Cloud Connect for Learning functional area.
     - The *Set Up: Learning External Content Integrations* domain in the Learning Core functional area.
3. Configure External Content on page 2051.

   Enable Workday Learning to include the third-party content you configured.

Related Information

Concepts

Setup Considerations: Learning Content on page 1947

Tasks

Configure External Content on page 2051

Reference

Reference: External Content Provider Configurations on page 2056

Examples

https://community.workday.com/articles/413086

Steps: Set Up External Tracking

Prerequisites

Note: This information is to help you set up external tracking if you are using legacy tasks to integrate with Workday Learning. See Concept: Cloud Connect for Learning Integration Methods to learn about the various integration methods and their benefits.

- Set up Cloud Connect for Learning. See Steps: Set Up Cloud Connect for Learning.
- Administrator access and an active account for the external provider.
- Content Import integration must be complete.

- Test tracking in a Sandbox tenant before enabling it in Production.

Context

You can enable near real-time completion and in progress tracking to track when learners consume external content from these providers on the Learning dashboard:

- Coursera
- Go1
- Harvard ManageMentor®
- LinkedIn Learning™
- OpenSesame
- Pluralsight
- Skillsoft Percipio
- Udemy Business

In progress tracking for these providers works by default for all customers who enable completion tracking. To protect overall customer tenant performance, Workday limits tracking requests per tenant, per external content provider, to 1000 requests per minute. In the unusual event of high system load and an increase in the number of requests, it can take anywhere from 12 to 24 hours for the tracking record to be updated, depending on each external content provider's retry mechanism.

To successfully track a learner's progress send the learner’s Workday Username from an Identity provider (IdP) to the external content provider on the Account Name of the tracking statement. Using Workday Username guarantees a unique ID. Only use an Employee ID or an email if it matches the learner's Workday Username.

These providers communicate with Workday in near-real time regardless of whether a learner launches their content from:

- A desktop device.
- An external platform.
- Mobile.
- Workday Learning.

If you enable completion tracking, the Mark Complete button automatically disappears.

Note: Don't configure Cloud Connect for Learning on a Gold tenant.

Steps

1. (Optional) Activate Single Sign-On (SSO) tracking integration.

   Note: Contact your content provider to confirm the SSO support.

   As the process varies for each provider, we recommend that you contact them directly and use their documentation to configure it correctly. They'll work with your IT staff to configure SSO with your corporate identity provider, and to use the Workday Username as the Account name on the tracking statement.

   If you don’t have an IdP, you can use a learner’s email address as the user identifier value for tracking. However, you must create a custom report using the External Tracking Requests report data source on a regular basis to view failed tracking instances.

   Workday recommends tracking a learner's progress using their Workday Username.

2. Run the Configure External Content Tracking Credentials report to generate values for these Parameter fields:

    - *Auth URL*
    - *Client ID*
    - *Client Secret*
    - *Tracking URL*

    Security: The *Set Up: External Content* domain in the Backpack Hub Service and Cloud Connect for Learning domains.
3. Select an external content provider and the Generate Credentials button.

    Take note of your Client Secret information. If you lose it, you'll need to generate new credentials.
4. Confirm that you've recorded your credentials.
5. (Optional) Select the Regenerate Credentials button on the trusted credentials summary if you've lost your Client Secret information.
6. Access the Create Client Credentials Mapping task.

    Only Security Administrators can run this task.

    Security: The *Security Administration* domain in the System functional area.
7. Enter these values:

Field	Value
Client ID	The *Client ID* you generated using the Configure External Content Tracking Credentials report.
Integration System User	The Integration System User (ISU) must be part of an Integration System Security Group (ISSG) on the *Cloud Connect for Learning Service* domain security policy. Grant the ISSG *View* and *Modify* permissions for reports and tasks and *Get* and *Put* permissions for integrations. To save time, we recommend that you reuse the ISU for Content Import integration.

8. Access the Administrator page for your external content provider to add completion integration details.

    Consult configuration guides for your external content provider for details on how to configure their tracking functionality.

9. Enter the generated credentials to activate the integration:

   Depending on the external content provider, you can:

   - Configure tracking using their user interface.
   - Contact their support team to configure tracking on your behalf.

   We recommend that you test tracking in Sandbox before enabling it in Production. Tracking won't be recorded in Sandbox once it's enabled in Production.

   If you aren't using Workday Account Username to configure tracking, and you would like to use Workday Account Username, work with your content provider to ensure they support the sending of Workday Username in their integration.

   If you are using a learner's email address as the user identifier value for tracking, you must create a custom report using the External Tracking Requests report data source on a regular basis to view failed tracking instances.

   If you're using a learner's email address as the user identifier value, then tracking won't record if:

   - The learner completed a course on an external content provider's website that's not imported into your Workday tenant.
   - The learner's email on the external content provider's website isn't the same learner email used to log into Workday.

   The tracking mechanism disregards statements for learners who have 2 or more persons with the same email address. We expect that each person in Workday has a unique email address according to the external content provider's setup. A common exception to this includes customers with 2 persons or more with the same email address such as:

   - Contingent workers who become full-time employees.
   - Pre-hires who become full-time employees.

   So for multiple learners with the same email address, we:

   - Check all people with duplicate addresses.
   - Check whether there's at least 1 learning record associated to exactly 1 person.
   - Associate the tracking to that person.

10. Edit Domain Security Policies.

    To report on failed tracking instances for your organization, configure the *Manage: External Tracking Data* domain in the Cloud Connect for Learning functional area. Grant security groups Modify permissions.

11. (Optional) Create Custom Reports.

    Create an advanced custom report to view these failed tracking instances for your organization:

    - Course not found: When the learner consumed a course on an external content provider's website that's not imported into your Workday tenant.
    - Duplicate email found: When there are multiple learners with the same email address.
    - Learner not found: When the learner's email on the external content provider's website isn't the same learner email used to log into Workday, or the email isn't associated to a learner in Workday.

    a) From the Data Source prompt, select the External Tracking Requests report data source (RDS).

       Note: Every week, Workday automatically deletes failed tracking instances older than 180 days on the External Tracking Requests RDS.

    b) On the Columns tab, add rows with these selections in Fields column:

       - *Content Provider*
       - *Created Moment*
       - *External Tracking Processing Errors*
       - *External Tracking Request*
       - *Learner Actor ID*
       - *Learner Email*
       - *Learning Content Reference ID*

Result

Workday provides you and your learners with more accurate information on their external content consumption.

Next Steps

Use these custom report fields in your custom reports to surface tracking data for your organization:

- External Content Attendance Duration in Minutes: To track the amount of time a learner has spent on an activity associated with an enrollment. Workday can only track this information if the external content providers submit it.
- Last Updated Lesson Tracking Moment: To view a timestamp for a lesson's in progress and completion tracking.
- Record Progress: Contains a default value of 0.5 to record in progress tracking for external content.

Related Information

Tasks

Steps: Set Up Integration System User Security for Cloud Connect for Learning on page 2036

Configure External Content on page 2051

Reference

Reference: External Content Provider Configurations on page 2056

Examples

Troubleshooting: Configure Cloud Connect for Learning on page 2062

2022R1 What's New Post: Cloud Connect for Learning: Completion Tracking for LinkedIn Learning and Udemy Business

2023R1 What's New Post: OpenSesame Content Import and Tracking

https://community.workday.com/node/1171474

Configure External Content

Prerequisites

Note: Workday plans to retire Content Cloud YouTube integration in a future release.

Note: This information is to help you configure external content if you are using legacy tasks to integrate with Workday Learning. See Concept: Cloud Connect for Learning Integration Methods to learn about the various integration methods and their benefits.

- Ensure that you have an active account with the external provider.
- Set up Cloud Connect for Learning for Coursera, Go1, Harvard ManageMentor®, LinkedIn Learning™, OpenSesame, Pluralsight, Skillsoft Percipio, or Udemy Business using the Configure External Content Provider task. See Steps: Set Up Cloud Connect for Learning.
- Enable these security domains and grant *View* and *Modify* permissions for reports and tasks and *Get* and *Put* permissions for integrations:
    - The *Set Up: External Content* domain in the Cloud Connect for Learning functional area.
    - The *Set Up: Learning External Content Integrations* domain in the Learning Core functional area.

Context

You can enable learners to access third-party content from these providers in search, discovery, and recommendations alongside internal content on the Learning dashboard:

- Coursera
- Go1
- Harvard ManageMentor®
- LinkedIn Learning™
- OpenSesame
- Pluralsight
- Skillsoft Percipio
- Udemy Business

Workday:

- Doesn't control and isn't liable for information presented in external content. The views and statements made in external content represent the views of the author or content creator, and not the views of Workday. If you find any of this content offensive or inappropriate, contact the content creator or content service provider, or stop viewing the content.
- Doesn't record your activity if you view linked external content in a separate web browser or tab.
- Only supports Skillsoft Percipio courses on mobile devices that Skillsoft Percipio has designed for mobile.

Steps

1. Access the Configure External Content task.
2. As you complete this task, consider:

Option	Description
Content Provider	Select *External Course*: for Coursera, Go1, Harvard ManageMentor®, LinkedIn Learning™, OpenSesame, Pluralsight, Skillsoft Percipio, or Udemy Business content.
Default Learning Topic	Select a default learning topic from your tenant to map to third-party content.

Option	Description
Import Exact and Synonymous Skills	When you have Skills Cloud enabled and you select Skillsoft Percipio or Udemy as the Content Provider, select this option to import up to 25 exact and synonymous skills per piece of content.
Opt-Out of Synonymous Skills	Select this option when you want to exclude synonymous skills from your import. Note: Workday recommends including synonymous skills for the best matching of vendor skills to Workday Skills Cloud or maintained skills.
Requires Enrollment	Select this check box if content from this content provider requires enrollment.
Exclude from Recommendations	Workday populates these content container worklets on the Learning dashboard with recommendations for relevant learning content: • Based on Your Interests • Based on Your Skills to Develop • Most Popular • Popular in Your Role • Recently Added • Recommended for You • You Might Also Be Interested In Workday also includes learning recommendations on these reports: • Opportunity Graph (in the Popular for This Role section) • View Competency Select this check box to exclude the content from this content provider from the results.
Exclude from Search and Browse	Select this check box to exclude content from this content provider from appearing in the Browse Learning Content report and global search results. If you've customized the Browse Learning Content report for your company, Workday recommends that you manually update the *Exclude from Search and Browse filter* on pre-existing reports.

3. In the Topic Mapping grid, add rules to enable Workday to map tagged third-party content to learning topics in your tenant. As you complete the grid, consider:

Option	Description
Order	Workday resolves the mapping rules in the order that you specify. If it can't resolve any of the rules, it maps the content to the Default Learning Topic.

Option	Description
Topics	Select 1 or more learning topics to associate with the content.
Tags	Select 1 or more tags that are already associated with the third-party content. For Coursera, Go1, Harvard ManageMentor®, OpenSesame, Pluralsight, and Skillsoft Percipio content, Workday only displays tags after you run the integration for the first time. To map content to a topic that you configured using the Configure External Content task, ensure that you've listed at least one tag in the mapping rule row. When you list multiple tags in the same row, Workday applies *And* logic when evaluating the rule. Example: You create a rule that maps Learning Topic A to Tags 1 and 2 in the same row. A piece of content must have at least Tags 1 and 2 to map to Learning Topic A. Content 1 has Tags 1, 2, 3, so it maps to Learning Topic A. You can create an *Or* relationship by creating multiple mapping rules for the same topic and specifying different tags in each row. Example: You create a rule mapping Learning Topic B to Tag 1 and a separate rule mapping Learning Topic B to Tag 2. Content 1 must have either Tag 1 or Tag 2 to map to Learning Topic B. Order matters when using the Configure External Content task, as Workday resolves topic mapping in the order that you specify. Example: Content 1 has Tags 1,2,3,4, which are mapped in order: Example 1: • Learning Topic A to Tag 4. • Learning Topic B to Tags 1,2,3. • Content 1 maps to Learning Topic A. Example 2: • Learning Topic B to Tags 1,2,3. • Learning Topic A to Tag 4. • Content 1 maps to Learning Topic B.

When you associate learning topics with external content, Workday applies the topics to the content immediately. Any topic-based segmented security that restricts access to the content also applies with immediate effect. Updates to the Topic facet in Learning search results can take up to 6 hours. Ensure that you allow the appropriate amount of time to pass before verifying that Workday maps the external content to the topics in your tenant.

Result

When you select a lesson or course, Workday displays the content in these reports:

- View External Lesson: Enables learners to consent to third-party terms and play videos. Learning administrators can activate and inactivate the lesson.
- View External Digital Course: Enables learners to view external digital course content. You can enable near real-time tracking for Coursera, LinkedIn Learning, Skillsoft Percipio, and Udemy Business. Tracking is recorded whether learners consume the content in Workday Learning or the external content provider's website. Workday removes the Mark Complete button once you've configured completion tracking for the content.

You can view imported third-party skills and their corresponding mappings on the View External Skill report.

Related Information

Concepts

Setup Considerations: Learning Content on page 1947

Tasks

Steps: Set Up Integration System User Security for Cloud Connect for Learning on page 2036

Steps: Set Up Cloud Connect for Learning Using Legacy Tasks on page 2043

Steps: Set Up Public Learning Content on page 2045

Steps: Set Up External Tracking on page 2046

Reference

Reference: External Content Provider Configurations on page 2056

Reference: External Content Provider Configurations on page 2056

2024R1 What’s New Post: Skills Import for Skillsoft Percipio

Examples

Troubleshooting: Configure Cloud Connect for Learning on page 2062

Available Innovation Services – Service Descriptions and Exhibits

2022R2 What's New Post: Cloud Connect for Learning: Content Import and Tracking for Coursera

2022R2 What's New Post: Cloud Connect for Learning: Content Import for Pluralsight

2022R1 What's New Post: Cloud Connect for Learning: Completion Tracking for LinkedIn Learning and Udemy

2022R2 What's New Post: Completion Tracking for Pluralsight in Cloud Connect for Learning

2023R1 What's New Post: OpenSesame Content Import and Tracking

Go1 Content Import and Tracking

https://community.workday.com/articles/413086

2022R1 What's New Post: Cloud Connect for Learning: Completion Tracking for LinkedIn Learning and Udemy Business

https://community.workday.com/node/1171474

Concept: Cloud Connect for Learning Integration Methods

Third-party learning content providers integrate with Workday Learning using 1 of these 2 methods:

- The Cloud Connect for Learning (CCL) platform.
- These legacy tasks:
    - Configure External Content
    - Configure External Content Provider
    - Configure External Content Tracking Credentials
    - Create Client Credential Mapping

Understanding the differences helps you choose the right path for your organization.

Cloud Connect for Learning (CCL) Platform Integration

The CCL platform is the streamlined solution for integrating content providers with Workday Learning. It enables third-party providers to build and manage their own integrations with Workday, independent of Workday's release schedule. This approach simplifies the setup process for you.

Key features:

- Simplified Setup: You use a single task, Configure Cloud Connect for Learning, to set up or migrate a content provider.
- Future-Proof: All future enhancements and new features for learning content integrations will be delivered exclusively through the CCL platform. This includes new content types, like collections, and expanded skills import functionality.
- Provider Independence: Content providers can release updates to their integrations at any time, giving you quicker access to new features and a wider choice of providers.

If you're setting up an integration with an existing content provider where channels were used, Workday no longer supports channel selection in the CCL platform as content curation will be done on the content provider side.

Benefits of Migrating to the Cloud Connect for Learning Platform

- Access to Innovation: You'll receive all future enhancements, ensuring your learning ecosystem remains current.
- Simplified Configuration: A single task simplifies the setup and management of each content provider integration.
- Greater Content Choice: As more providers build on the CCL platform, you will have a larger and more diverse catalog of content to choose from.

If you’re using the legacy integrations, you can continue to use the current setup. However, as the CCL platform is the strategic path forward for all learning content integrations in Workday, we recommend:

- Migrating existing legacy integrations to the CCL platform when your content provider becomes available on the platform. After you migrate a provider, Workday automatically removes it from the legacy configuration tasks.
- Using the CCL platform if you are setting up CCL for a content provider for the first time if your provider is already available in the CCL platform.

For information on the list of content providers who are using the CCL platform, see Reference: Content Providers Using the CCL Platform to Integrate With Workday Learning.

Legacy Integration

The legacy integration method is the original way of connecting content providers to Workday Learning. This approach involves a point-to-point integration that requires you to configure multiple tasks to establish the connection for each content provider. Use this integration method if your content provider is not yet in the CCL platform.

Key features:

- Task-Based Setup: Configuration typically involves using a combination of these tasks:
  - Configure External Content
  - Configure External Content Provider
  - Configure External Content Tracking Credentials
  - Create Client Credential Mapping
- No Future Enhancements: Workday won't update individual legacy integrations with new features. Example: New content types won’t be available for any content providers, and skills import functionality will be available only for 2 content providers through this method.

Content providers available in the legacy integration task:

- Coursera
- Go1
- Harvard ManageMentor®
- LinkedIn Learning™
- OpenSesame
- Pluralsight
- Skillsoft Percipio
- Udemy Business

To take advantage of new features like skills support and ensure long-term support, you should plan to migrate your providers to the CCL platform if your provider is already available in the CCL platform.

Related Information

Tasks

Steps: Set Up Cloud Connect for Learning Using Legacy Tasks on page 2043

Steps: Set Up Cloud Connect for Learning Using Cloud Connect for Learning Platform on page 2038

Reference: External Content Provider Configurations

Note: Workday plans to retire Content Cloud YouTube integration in a future release.

You can set up Cloud Connect for Learning and Public Learning Content, and use the Configure External Content Provider task to enable third-party provider content in your tenant.

All Cloud Connect for Learning integrations require an Integration System User (ISU) and Integration System Security Group (ISSG).

Provider	Settings
Coursera	Parameters: Contact Coursera for your client credentials. Process Monitor: You can check the status of the import integration by accessing the Process Monitor information. The Process Type is Integration and the Process is Coursera Import. Scheduled processes run nightly but the only way to view them is to check your Process Monitor to see when the import was previously run. Content Import: • We import courses and guided projects only. • We don't import courses with languages that aren't supported in Workday Learning.
Go1	Parameters: Contact Go1 for your client credentials. Process Monitor: You can check the status of the import integration by accessing the Process Monitor information. The Process Type is Integration and the Process is Go1 Import. Scheduled processes run nightly but the only way to view them is to check your

Provider	Settings
	Process Monitor to see when the import was previously run. Content Import: • We import Go1 courses only. • We don't import courses with languages that aren't supported in Workday Learning.
Harvard ManageMentor®	Parameters: Enter the subdomain that your organization uses for Single Sign-On (SSO). Channels: The channels correspond with Harvard ManageMentor courses that can contain content such as text, video, and quizzes. Workday displays the courses in Learning, but you must manually launch the course in Harvard ManageMentor to view the associated lessons and assessments. Content Import: We don't import courses with languages that aren't supported in Workday Learning.
LinkedIn Learning™	Parameters: Contact LinkedIn Learning™ for your client credentials. Channels: The channels correspond with LinkedIn Learning™ subjects that contain courses. Workday displays the courses in Learning but you must manually launch the course in LinkedIn Learning™ to view the associated lessons and assessments. The Unclassified channel corresponds to LinkedIn Learning™ courses that don't belong to any specific subject. You must have an All Language License from LinkedIn Learning™ to activate non-English channels. Process Monitor: You can check the status of the import integration by accessing the Process Monitor information. The Process Type is Integration and the Process is LinkedIn Learning Import. Scheduled processes run nightly but the only way to view them is to check your Process Monitor to see when the import was previously run. Content Import:

Provider	Settings
	We don't import courses with languages that aren't supported in Workday Learning.
OpenSesame	Parameters: Contact your OpenSesame Implementation Specialist for your Customer Integration ID (CIID). Process Monitor: You can check the status of the import integration by accessing the Process Monitor information. The Process Type is Integration and the Process is OpenSesame Import. Scheduled processes run nightly but the only way to view them is to check your Process Monitor to see when the import was previously run. Content Import: • We import OpenSesame courses only. • We don't import courses with languages that aren't supported in Workday Learning.
Pluralsight	Parameters: Contact Pluralsight for your client credentials. Process Monitor: You can check the status of the import integration by accessing the Process Monitor information. The Process Type is Integration and the Process is Pluralsight Content Import. Scheduled processes run nightly but the only way to view them is to check your Process Monitor to see when the import was previously run. Content Import: • We import Pluralsight courses only. • We don't import courses with languages that aren't supported in Workday Learning.
Skillsoft Percipio	Parameters: Contact Skillsoft Percipio for your client credentials. Channels: Channel selection isn’t available for Skillsoft Percipio. Contact Skillsoft Percipio for assistance on the content selection process before importing into Workday assessments, audio, books, courses, labs, and videos. Process Monitor: You can check the status of the import integration by accessing the Process Monitor information. The Process Type is Integration and the Process is Percipio Import. Scheduled processes run

Provider	Settings
	nightly but the only way to view them is to check your Process Monitor to see when the import was previously run. Content Import: • We import external content types such as assessments, audio, books, courses, labs, and videos. No configuration is required to import content types but we recommend that you contact Skillsoft Percipio for assistance on the content selection process. • Learners can use the *External Content Type* facet on the Browse Learning Content report to filter external content if they've configured Skillsoft Percipio in their tenant. • We don't import courses with languages that aren't supported in Workday Learning. • We enable you to import up to 25 exact and synonymous skills per piece of content, and up to 12,000 skills total for Skillsoft Percipio.
Udemy Business	Parameters: Contact Udemy Business for your client credentials. Channels: The channels correspond with Udemy Business subtopics that contain courses. Workday displays the courses in Learning but you must manually launch the course in Udemy Business to view the associated lessons and assessments. Process Monitor: You can check the status of the import integration by accessing the Process Monitor information. The Process Type is Integration and the Process is Content Provider Course Import. Scheduled processes run nightly but the only way to view them is to check your Process Monitor to see when the import was previously run. Content Import: • We don't import courses with languages that aren't supported in Workday Learning. • We enable you to import up to 25 exact and synonymous skills per piece of content.
YouTube™	Channels: The channels correspond with YouTube channels that contain videos. Workday displays the videos in Learning as standalone lessons.

<table>
<tr><th>Provider</th><th>Settings</th></tr>
<tr><td></td><td>Note: Some content creators might require additional licenses. Customers are responsible for ensuring that they have the proper rights to use content for these channels.

You can only activate these channels from the Workday-delivered list:

• 99u
• Berkeley Haas
• Collision Conference
• Columbia Business School
• Content Marketing Institute
• DataCamp
• DevTips
• ESADE
• Forbes
• GOTO Conferences
• Harvard Business School
• HSGUniStGallen
• INSEAD
• Jack Welch Management Institute
• Kellogg School of Management
• KnowledgeAtWharton
• Lean In
• LearnCode.academy
• LevelUpTuts
• London Business School
• Microsoft Office 365
• Mind The Product
• Presidents Institute
• Rotman School of Management
• Said Business School, University of Oxford
• SimonSinek
• South x Southwest (SXSW)
• Stanford Graduate School of Business
• Startup Grind
• The Economist
• The Ross School of Business - University of Michigan
• Workday</td></tr>
</table>

To remove external content from the Browse Learning Content report, access the Configure External Content task, select the external content you want to remove, and select the Exclude from Search and Browse check box.

To deactivate an external content provider, access the Configure External Content Provider task and deselect their channels. If an external content provider has no channels, you can deactivate the content by deselecting the Active check box that displays on the task instead.

Related Information

Concepts

Setup Considerations: Learning Content on page 1947

Tasks

Steps: Set Up Integration System User Security for Cloud Connect for Learning on page 2036
Configure External Content on page 2051
Steps: Set Up External Tracking on page 2046
Steps: Set Up Cloud Connect for Learning Using Legacy Tasks on page 2043
Steps: Set Up Public Learning Content on page 2045
Steps: Set Up Cloud Connect for Learning Using Legacy Tasks on page 2043
Steps: Set Up Public Learning Content on page 2045

Reference: Content Providers Using the CCL Platform to Integrate With Workday Learning

Content Providers Available in the CCL Platform

- Big Think
- Emtrain
- Go1
- goFLUENT
- Intuition
- OpenSesame
- O'Reilly
- Speexx
- Udacity
- Udemy

Note: Contact your content provider directly for integration delivery dates.

Content Providers in the Process of Integrating With the CCL Platform

These content providers are in the process of integrating with the CCL platform to integrate with Workday Learning:

- BizLibrary
- DataCamp
- Coursera
- Development Dimensions International
- Edflex
- Elsevier Clinical Solutions
- Harvard Business Publishing
- LinkedIn
- Pluralsight
- Skillsoft

Note: Contact your content provider directly for integration delivery dates.

Content Providers Intending to Integrate With the CCL Platform

These content providers are intending to integrate with the CCL platform to integrate with Workday Learning:

- Ethena
- Pearson
- Relias

Note: For more information, contact your content provider directly.

Content Providers Available in the Legacy Configure External Content Provider Task

- Coursera
- Go1
- Harvard ManageMentor®
- LinkedIn Learning™
- OpenSesame
- Pluralsight
- Skillsoft Percipio
- Udemy Business

Related Information

Tasks

Steps: Set Up Cloud Connect for Learning Using Cloud Connect for Learning Platform on page 2038

Troubleshooting: Configure Cloud Connect for Learning

Users can't find the new Integration System User in the drop-down.

Cause: Users have not enabled the *Cloud Connect for Learning Service* domain.

Solution:

Steps

1. Access the View Domain report.
2. Select the *Cloud Connect for Learning Service* domain from the Domain prompt.
3. Click the magnifying glass icon next to Domain Security Policy. If the domain is not enabled, the status will be Suspended - Policy not enabled.
4. On the View Domain Security Policy report, from the related actions menu of the Cloud Connect for Learning Service, select Domain Security Policy > Enable.

Users can't find the Configure Cloud Connect for Learning task.

Cause: The user is not configured for the correct domains.

Solution: Create a Learning Administrator with these domains with the *View* and *Modify* access and assign a user or users to the Learning Administrator:

- *Cloud Connect for Learning Service :* This domain requires *GET*, *PUT*, *View*, and *Modify* permissions.
- *Manage: Learning Additional Data*
- *Manage: Learning Content*
- *Manage: Learning Course Enrollments*
- *Person Data: Learning*
- *Person Data: Learning Record*
- *Set Up: Learning Catalog*
- *Set Up: External Content*
- *Set Up: Learning External Content Integrations*: This domain requires *GET*, *PUT*, *View*, and *Modify* permissions.

For information on user-based security groups, see Create User-Based Security Groups.

Users can't find the Configure Cloud Connect for Learning task after configuring the correct domains.

Cause: The tenant has not been configured correctly.

Solution: Contact Workday Partner Support and share the Tenant Name.

Users see Error Your request failed. Contact support when generating or regenerating credentials on the Manage Credentials page.

Cause: The tenant has not been configured correctly.

Solution: Contact Workday Partner Support and share the Client ID and Tenant Name.

Related Information

Concepts

Setup Considerations: Learning Content on page 1947

Tasks

Steps: Set Up Integration System User Security for Cloud Connect for Learning on page 2036

Configure External Content on page 2051

Steps: Set Up External Tracking on page 2046

Steps: Set Up Cloud Connect for Learning Using Legacy Tasks on page 2043

Steps: Set Up Cloud Connect for Learning Using Cloud Connect for Learning Platform on page 2038

FAQ: Cloud Connect for Learning

What are the methods content providers use to integrate with Workday Learning?	Third-party content providers integrate with Workday Learning using 1 of these 2 methods:
	• The Cloud Connect for Learning (CCL) platform.
	• These legacy tasks:
	    • Configure External Content
	    • Configure External Content Provider
	    • Configure External Content Tracking Credentials
	    • Create Client Credential Mapping
	See Concept: Cloud Connect for Learning Integration Methods to learn about the various integration methods and their benefits.

My content provider is listed both under providers using the legacy tasks and under the CCL platform. Which task should I use to set up CCL for the first time?	Workday recommends you to set up CCL for your content provider in the Cloud Connect for Learning platform if your provider is already available in the Cloud Connect for Learning platform. See Concept: Cloud Connect for Learning Integration Methods to learn about the various integration methods and their benefits.
I have set up CCL for my content provider using the legacy tasks. If my content provider is available in the CCL platform, what should I do?	Workday recommends migrating existing legacy integrations to the Cloud Connect for Learning platform when your content provider becomes available on the platform, as the Cloud Connect for Learning platform is the strategic path forward for all learning content integrations in Workday. See Concept: Cloud Connect for Learning Integration Methods to learn about the various integration methods and their benefits.

Which ISU should I select from the Integration System User (ISU) prompt if multiple ISUs display?	Each integration will require a unique Integration System User (ISU). As you are configuring a new Content Provider in the Cloud Connect for Learning platform, you need to select the ISU created for that Content Provider.
What happens if I select or clear the Import External Vendor Skills check box in the Configure Cloud Connect for Learning task?	If you select the check box, you import exact and synonymous skills from content providers to Workday Learning, provided you have opted in to receive skills on the content provider platform. If you clear the check box, workday will not import content that contains skills. If you make this change, you must contact the content provider. We don’t recommend clearing the Import External Vendor Skills check box after you enable skills.
What happens if I select or clear the Opt-Out of Synonymous Skills check box in the Configure Cloud Connect for Learning task?	If you select the check box, you disable synonymous skills matching from the imported skills from content providers to Workday Learning. If you clear the check box, you allow synonymous skills matching from the imported skills from content providers to Workday Learning.
Which default learning topic should I select when I set up CCL for my content provider?	Choose a topic based on your organization's learning content strategy.
How long should I wait for the content sync after I set up CCL for my content provider in the CCL platform?	After the content provider imports the content to Workday, Workday has to index the content. For production environments, indexing can take up to 12 hours, and for non-production environments, indexing can take up to 24 hours.
My content provider supports skill mapping. Where does Workday display the newly mapped skills?	Skills are displayed on the Learning content.
What does the Data Added field on the content indicate?	This is the date when the content was published. This information comes from the content provider.
How can learners find various external content partner content types in Workday?	Learners can filter content using the External Content Type filter in the Browse Learning Content report to find content imported by external content providers to Workday Learning.
How does engagement with external content providers show up in Workday?	A Learning admin can view the Learning Admin dashboard, and select the Content Provider tab to view engagement.

Related Information

Tasks

Steps: Set Up Cloud Connect for Learning Using Cloud Connect for Learning Platform on page 2038

Steps: Set Up Cloud Connect for Learning Using Legacy Tasks on page 2043

Packaged Content

Setup Considerations: Packaged Content for Learning

You can use this topic to help make decisions when planning your configuration and use of packaged content. 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

Packaged content in Workday refers to learning content that's compliant with SCORM (Sharable Content Object Reference Model) or AICC (Aviation Industry Computer-Based Training Committee) file-type specifications. Packaged content also includes courses licensed from e-learning content vendors. You can use packaged content in Workday Learning courses for desktop and mobile.

Business Benefits

- Create a familiar and intuitive experience for learners by enabling them to consume packaged learning content formats in Workday.
- Customize packaged learning content to create a personalized learning experience.
- Improve efficiency by selecting a packaged content lesson to provide the primary score and grade for the course.
- Simplify reporting using the tracking information for packaged content in learning reports.

Use Cases

- Automatically recover missing data to update records with the best completion, score, and success rates or the latest interactions.
- Import packaged content into Workday as lessons in a course.
- Track packages in Workday according to completion status

Questions to Consider

Questions	Considerations
What e-learning content standards does Learning support?	Workday supports these versions of AICC and SCORM for packaged content: • AICC 2.x • SCORM 1.2 • SCORM 2004 (2nd-4th Edition)
How do you want users to access packaged content?	You can create Workday Learning courses using packaged content for desktop and mobile. We support packaged content for iPad, iPhone, and Android using devices running: • Android 5.0 or later. • iOS11 or later.
How do you import existing media content into Workday?	You can import packaged content into Workday using: • Drive to load packaged content files. • Media importer or web services to bulk load external learning content. • The Workday Learning interface to add packaged content to an existing course.

Recommendations

- Learners should disable pop-up blockers, which can impact on interactions between SCORM packaged content and Workday.
- To manage large volumes of packaged content efficiently, use the Create Media Import Job task to upload files before you create lessons or courses.
- You can't use SCORM or AICC packaged content files for stand-alone lessons. As these files require detailed authoring and can be assigned to learners, we recommend putting them into lessons within a course instead, as this enables you to use more functionality for them.

Requirements

To enable Workday to receive question-level data from SCORM or AICC quizzes, you must:

- Enable packaged content interaction reporting on the Edit Tenant Setup - HCM task.
- Test your files in an independent tool to ensure that the files publish interaction results. Example: SCORM Cloud.

Limitations

- 4 GB is the maximum video file size for packaged content.
- Workday only scans for viruses on uploads of 2GB or under.
- Workday defaults limit uploads to 2GB for new customers only. You can select the Increase Maximum Upload Size check box on the Edit Tenant Setup - HCM task to enable larger uploads, but Workday won't scan them for viruses.
- You can only amend enrollment results for courses that contain packaged content when they have a status of not started or in progress.
- Your packaged content files must meet these requirements:
  - Maximum extracted file size of 20 GB.
  - Maximum of 100,000 extracted files.
  - Maximum zip file upload size, using Drive or Learning file picker, of 4 GB.
  - Maximum zip file upload size, using Media Import service, of 20 GB.

Tenant Setup

Enable tenant-wide settings for packaged content on the Edit Tenant Setup - HCM task.

Security

Domains	Considerations
Set Up: Learning External Content Integrations in the Learning Core functional area	Enables you to access management tasks related to external content integrations for Learning.
Set Up: Tenant Setup - HCM in the System functional area	Enables you to set up packaged content for your tenant.

Business Processes

You can use these business processes to add approval steps to courses containing packaged content when you create or edit learning content or manage learning content versions:

- *Manage Course*
- *Manage Lesson*
- *Manage Program*

Reporting

Reports or Dashboards	Considerations
Translate Business Object	Create translated titles and descriptions for packaged content.
Learner Engagement	View enrollments and completions to evaluate learner engagement.
My Team's Learning	Display a summary of course completion status for learners.
View External Lesson	Activate and inactivate external lessons. Enable learners to consent to third-party terms and play videos.

Integrations

Integrations or Web Services	Considerations
Manage Course Offering *Manage Learning Course* *Manage Lesson* *Manage Learning Program*	Enables you to create or update learning content types.
Put Learning Content Subscription	Enables you to create or update subscriptions for learning content that contains packaged content.
Put Learning Imported Content *Put Learning Imported Record*	Enables you to bulk load existing content or enrollments into Workday.
Put Media Settings	Enables you to update restricted access settings for media items.

Connections and Touchpoints

Features	Considerations
Career and Development Planning	You can create packaged content that learners can consume for their personal or professional development.
Talent	You can use survey functionality from Talent as a lesson type in a course to gather feedback to improve your packaged content materials.

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: Learning on page 1871

Setup Considerations: Learning Content on page 1947

Tasks

Configure External Content on page 2051

Steps: Manage Learning Content on page 1969

Reference

FAQ: Packaged Content on page 2071
FAQ: Uploading and Viewing Videos
Reference: External Content Provider Configurations on page 2056
Reference: Edit Tenant Setup - HCM
Reference: File Actions in Drive Based on File Type

Steps: Set Up Packaged Content for Learning

Prerequisites

Review setup considerations for packaged content.

Note: The steps for enabling this feature depend on your organization's subscription service agreement. To determine your subscription service agreement, a Community user can:

1. Access your profile avatar on Community.
2. Select the Profile button.
3. On your profile page, select your organization's name underneath your name and to the right of your title.
4. View the Subscription Service Agreement value.
    - If the value is *UMSA*, the Media Cloud functionality is provided under the relevant terms within the Platform and Product Extensions Product Terms.
    - If the value is *MSA*, the Media Cloud functionality is provided under the terms of the Media Cloud Addendum.

Context

You can import third-party material to your learning courses.

Steps

1. Access the Edit Tenant Setup - HCM task.

   In the Packaged Content section, select the Enable Packaged Content check box.

   (Optional) Configure other tenant-wide options for your packaged content.

   See Reference: Edit Tenant Setup - HCM.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

2. (Optional) Set up Learner Name for Packaged Content.

   Enable Workday to send a learner's name, ID, or both, to third-party packaged content providers.

   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.

   If your Subscription Service Agreement value is *MSA*, Enable Innovation Services Feature and Machine Learning Data Contributions for MSA customers.

   a. On the Innovation Services Opt-In task, select the Learner Name service on the Available Services tab in the Learning category.
   b. On the Maintain Innovation Services and Data Selection Opt In task, select Learner Name and Learner ID in the Learning: Learner Name category.

   If your Subscription Service Agreement value is *UMSA*:

   a. Access the Edit Tenant Setup - HCM task.
   b. In the Packaged Content section, select the Send Learner Name to Third-Content Provider check box.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

Next Steps

Import third-party material and add it to your learning courses.

Related Information

Concepts

Setup Considerations: Learning Content on page 1947

Tasks

Configure External Content on page 2051

Steps: Manage Learning Content on page 1969

Reference

FAQ: Packaged Content on page 2071

FAQ: Uploading and Viewing Videos

Reference: External Content Provider Configurations on page 2056

Reference: File Actions in Drive Based on File Type

Getting Started with Media Cloud

Concept: Packaged Content

Workday uses the term packaged content to describe learning content that's compliant with SCORM or AICC file type specifications. Packaged content also includes courses licensed from content vendors, such as Skillsoft. You can create Learning lessons and courses for both desktop and mobile using packaged content.

Since e-learning content can contain many media files, packaged content contains a manifest file or a set of descriptor files that defines the basic functions of the package.

Creating and Uploading

You can:

- Create packaged content using external applications, such as Adobe Captivate and Articulate Storyline.
- Import the files directly into Workday Learning lessons (except stand-alone lessons).

When you have a large volume of packaged content, Workday recommends that you use the Create Media Import Job task to upload the files before you create Learning lessons or courses. The maximum file size limit for packaged content is 4 GB.

Tracking

Workday tracks the status (Not Started, In Progress, Completed) for each package you launch.

Some packaged content opens in a separate browser window. If your Workday session times out before you complete the packaged content, Workday still saves your progress. When you log back into Workday, Workday directs you back to the Learning page that launched the content.

When you launch packaged content that contains a scoring element or assessment, Workday also tracks summary data (pass/fail, score). You can use Learning reports to view tracking data.

Concept: Best Practices for Uploading Packaged Content on Mobile

Workday supports packaged content for:

- iPad and iPhone devices running iOS 11 or later.
- Devices running Android 5.0 or later.

Packaged content might not display optimally on older devices and operating systems.

Workday doesn't optimize packaged content videos for playback. To minimize the risk of packaged content playback issues on mobile, we recommend that you follow these guidelines.

Container Format

Package your content in HTML5 and avoid using advanced features that might not be compatible with mobile devices, such as battery status and vibration.

Content and Device Considerations

Avoid using Flash or Flash Video, because iOS and Android operating systems don't support them.

If you use Multi-SCO or Multi-AU packaged content that uses layered navigation modules or tables, the lack of available screen space might cause playback rendering errors.

Cross-domain content, such as Skillsoft, might not work predictably on all devices due to differences in network firewalls and browser compatibility.

External Document Links

On Android devices, Workday opens PDF external document link types in the same browser tab that you're on. When you add any other supported external document link type to your content, you might have to install third-party applications to view the content. iOS devices open external document link types in their own web view. We support these external document link types in mobile packaged content:

Operating System	External Document Link Type

Android	• Excel (.xls, .xlsx)
	• Images
	    • .bmp
	    • .gif
	    • .jpeg
	    • .jpg
	    • .png
	    • .svg
	    • .tif
	    • .tiff
	• PDF (.pdf)
	• PowerPoint (.ppt, .pptx)
	• Rich Text Format (.rtf)

Operating System	External Document Link Type

	• Videos
	  ◦ .mkv
	  ◦ .mov
	  ◦ .mp4
	• Word (.doc, .docx)

iOS	• Excel (.xls, .xlsx)
	• Images
	  ◦ .bmp
	  ◦ .gif
	  ◦ .jpeg
	  ◦ .jpg
	  ◦ .png
	  ◦ .svg
	  ◦ .tif
	  ◦ .tiff
	• Keynote (.key)
	• Numbers (.numbers)
	• Pages (.pages)
	• PDF (.pdf)
	• PowerPoint (.ppt, .pptx)
	• Rich Text Format (.rtf)
	• Videos
	  ◦ .mov
	  ◦ .mp4
	• Word (.doc, .docx)

FAQ: Packaged Content

Which package formats do Workday support?

Version	Release Date	Widely Used	Works Cross-Domain
AICC HACP	Feb. 1998	Yes	Yes
SCORM 1.2	Oct. 2001	Yes	No
SCORM 2004 (V2-V4)	Jul. 2004 - Mar. 2009	Yes	No

What is the maximum file size limit for packaged content?

4 GB.

Why am I receiving the error message: Processing failed for this media item?

If the item is a Lynda.com AICC package, the packaged content could be nested outside of the root folder. Manually unzip the package and nest the actual SCORM or AICC file in the zipped folder.

How reliable are packaged content completions and updates in Workday?	See: Packaged Content Reliability in Workday Learning.
How can I troubleshoot SCORM-related errors?	See: Packaged Content.
How can I report on SCORM content scores?	You can select theProvide Course Gradecheck box on a SCORM lesson and create a custom report against learning enrollments for score and grade. If replay is allowed on a SCORM lesson, learners can replay the lesson to improve their score. If replaying of a SCORM lesson isn't allowed, learners must create a new enrollment, and you can report on the latest enrollments to check the most recent score.
Why am I receiving the error message when I resume my SCORM 2004 (2nd and 3rd Editions): You failed this packaged content lesson?	This is expected behavior of SCORM 2004 (2nd and 3rd Editions). Rules have been corrected for SCORM 2004 (4th Edition). You have 2 options to fix this issue: • Republish your package as SCORM 2004 (4th Edition) if you've access to the authoring tool. • Alter the manifest file to override the default rollup rules. See: Packaged Content Tracking Troubleshooting.
How are completion statuses for Packaged Content, Lessons, and Courses determined?	Packaged Content: Completion status for packaged content is dependent on the logic built into the package by its author. Workday is reliant on receiving completion status information from the package. Lessons: Completion status for lessons is dependent on the packaged content completion status. Lesson status is set to *Not Started* before content is launched. When packaged content is launched, and before it's complete, status sets to *In Progress* in most cases. We mark both package and corresponding lesson as *Completed* when the package sends completion status to Workday. Courses: Completion status for learning courses is based on the logic for the course set by a learning administrator in Workday. Courses in Workday require all lessons that are required learning content to be complete.
What impact does the Enable Completion Without Exit functionality have on completion status?	Completion status for packaged content is determined by the logic built into the package by its author. You can configure the package to send completion status at any point during user consumption or upon user exit. Regardless of when the package sends the completion status to Workday, lesson completion status updates when the learner exits the course as a current default with interaction reporting enabled. Enable Completion Without Exit functionality updates this process

	so that lesson completion status is immediately marked in Workday as soon as completion status for packaged content is received. For highest reliability, Workday recommends that the tracking logic in your packaged content send completion status as early as makes logical sense. See: Completion Without Exit Tracking Logic.
How does the Enhanced Tracking Completion logic work?	Enhanced Tracking Completion (ETC) is designed to recover the tracking details of learners that might have completed a course, but aren't marked as *Completed* or *Passed* because the information was lost due to network issues or flaws in the SCORM standard. ETC is enabled for all Workday tenants by default. See: Enhanced Tracking Completion Recovery Logic.
How does the Align Workday and Packaged Content functionality work?	When a learner launches a piece of packaged content, that course opens in a separate pop-up window. Workday generates a separate session for the packaged content in order to track the learner's progress and course completion, which is independent from the underlying Workday session. The packaged content session refreshes by specific activity within the packaged content, such as progress, tracking, or bookmarking updates. In the case of SCORM content, this includes any updates in a RecordResults.jsp request, or in the case of AICC, a ProcessAiccRequest.jsp request. When you enable this functionality, the length of the packaged content session aligns to the length of the Workday session. Both remain active until: • Learners exit the course and the pop-up window closes. • Or, an inactivity threshold of 4 hours is reached. If no activity requests are received within a 4 hour period, the packaged content session expires and no further updates will be processed between the packaged content and Workday. • Or, a maximum extension time of 18 hours is reached for SCORM or AICC courses hosted inside Workday. For AICC courses hosted outside of Workday, the maximum extension time is 4 hours. If the package continues to send activity requests, the packaged content session is extended for up to 18 hours or 4 hours, respectively. After 18 hours or 4 hours, respectively, the packaged content session expires and no further updates are processed between the packaged content and Workday. If 1 of these criteria is met, the packaged content session expires and users see the message,

“A fatal error has occurred, communication with the server has been lost.” From that moment the Workday session resumes to the default session timeout you've configured.

It’s important to note that session inactivity isn't solely determined by user interactions within the packaged content. In Workday, session expiration is also influenced by automated system actions wherein the package content itself can autonomously send requests and therefore reflate the session to a maximum of 18 hours. This means that the session may not expire even if the user isn't actively engaging with the packaged content. Such non-user interactions are dependent on how the package itself is created. Examples include checks to see if the state has changed, or if the scores have changed. This feature is supported by web browsers and mobile web browsers only. User settings (e.g. extensions, storage/cookie settings) can modify the behavior of the mobile web browser to a certain extent. Also, by default, when the Mobile web browser is in the background (receiving a phone call, locking the phone, switching to a different application etc), the operating system suspends most of the Workday application activity and only specifically allowed applications are given extended time to perform additional functions, resulting in the Workday session to timeout.

Troubleshooting: Incorrect Learner Tracking in Packaged Content

Learners pass course at incorrect grade.

Cause: Pass / Fail threshold is incorrect. When you don't configure a passing score, the score records as *Unknown*, which results in unsuccessful tracking.

Solution:

Steps

1. Access your authoring tool.
2. Modify the grade parameter to record a pass or fail for each individual packaged course.

Failing learners don't receive a failing grade.

Cause: The grade parameter isn't set to record the fail grade. Example: A failing score records an *Incomplete* rather than *Fail* grade.

Solution:

Steps

1. Access your authoring tool.
2. To report a failing grade for a failing score, modify the grade parameter.

Related Information

Concepts

Concept: Completion Status for Learning Content on page 2016

Tasks

Create Learning Courses on page 1986
View and Edit Learning Content on page 2005

Learning Enrollments

Setup Considerations: Learning Enrollments

You can use this topic to help make decisions when planning your configuration and use of learning enrollments. 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

Workday enables you to manage learning enrollments for course offerings and digital courses including:

- Due dates.
- Grading.
- Mass actions.
- Waitlists.

Business Benefits

- Gain insights on enrollments in your organization by creating a discovery board.
- Help learners to find recommended content related to their active enrollments and visualize their required learning.
- Increase efficiency by managing mass enrollments for a large organization.
- Manage compliance for required learning in your organization by enrolling team members or entire teams in content.
- Reduce administrative overhead as learners select content and enroll themselves.
- Simplify assessment processes by enabling specific users to manage the grading and attendance roster.
- Streamline enrollment processes by assigning access levels to specific security groups so that they can manage enrollments.
- Manage enrollments efficiently by receiving warning messages when content a learner is being enrolled in conflicts with a scheduled absence or leave.

Use Cases

- Assign multiple assessors for each enrollment in course offerings with training activity lessons.
- Cancel or rescind enrollments.
- Define custom email notifications or approvals for learning enrollments.
- Enable learners to skip enrollment approval for content within a program.
- Enable administrators and managers to track and monitor learner engagement.
- Enable users to enroll themselves in content to improve skills related to their career interests.
- Inform learners when courses are available if enable express interest functionality, and configure reminders when they enroll.

- Enable notifications in Slack or Microsoft Teams for enrollment approvals.
- Manage waitlists for course offerings.
- Hide enrollment records from transcripts or reports.
- Self-assign as an additional assessor for an enrollment.
- Send questionnaires to learners to collect information such as dietary requirements or whether they need a sign language interpreter.

Questions to Consider

Question	Consideration
Who manages enrollments for your organization?	Workday enables you to configure specific access levels for different security groups so that they can mass enroll or drop learners. Example: You can grant limited access to trainers and unlimited access to administrators.
How do you want to manage course offerings that reach full capacity?	You can create an automatic or manual waitlist on a course to enable learners to join the waitlist of the course offering: • Automatic waitlists enroll learners into an offering if a space becomes available. • Manual waitlists require an administrator or an instructor to enroll the learner from the waitlist into the offering.
Who manages attendance and grading for enrollments in your organization?	You can enable administrators, instructors, and assessors to enter grading and attendance results for enrolled learners if you enable tracking options for 1 or more lessons.
Does your company need to remind learners of retraining requirements?	You can configure reminders for courses and programs with expiry periods that automatically notify learners when an enrollment has an upcoming expiration date and is due for retraining. You can also add multiple reminders to courses and programs that notify learners and their managers about their enrollments.
Does your organization assign required learning content to learners?	Workday supports the assignment of required learning through mass enrollment actions. Administrators and manager can set fixed or relative due dates on required learning enrollments.
Do you want to enable learners to enroll in content without manager approval?	You can add an entry condition rule for an approval step on the enrollment business process to determine when learners need manager approval. Example: Learners can enroll in a course offering without approval from their managers when the location of the offering is the Dublin office. You can also select the Skip Enrollment Approval option on the Create Program and Edit Program tasks if you want to enable learners to skip enrollment approval for content within a program.

Question	Consideration
What's the difference between dropping and cancelling an enrollment?	Learners can drop an enrollment once the content isn't required learning content. Administrators have the option of creating mandatory drop reasons from which learners must select when dropping enrollments so that they can understand their reasons for not completing the content. Learning administrators can cancel a single enrollment for a learner or they can perform a mass cancel action for a larger group of enrollments.
How do you want to communicate with enrolled learners?	You can create custom notifications on enrollment business processes or alerts from custom reports. You can configure notifications to inform learners when their enrollment has been approved or denied using: • Workday for Slack. • Workday for Microsoft Teams. 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.
How do you want to collect learner information when a learner enrolls in content or drops enrollment?	Add questionnaires for learners to complete when they enroll in content or drop enrollments. You can add the *Complete Questionnaire* action step to the Enroll in Content and Drop Learning Enrollment business processes. When a business process definition contains a *Complete Questionnaire* step that hasn't been configured, Workday displays an error message prompting you to run Configure Questionnaire. Questionnaire Administrators determine which questionnaires can be associated with a business process while they are creating or editing a questionnaire. Selecting the appropriate Questionnaire Type and Allowed on Business Process options makes a questionnaire available in the corresponding business processes.

Recommendations

- Remove the Assessor Dashboard worklet and Instructor Dashboard menu from the Learning dashboard so that trainers access their enrollment tasks and reports through the Learning Trainer dashboard.
- The limit for a mass enroll action is 100,000 but Workday recommends enrollments of less than or equal to 1,000.
- Use the *Manage Internal Learning Assessor* or *Manage External Learning Assessor* web service if you need to create large numbers of assessors.

- Use the *Save* filter on the offerings table that displays to learners on the Select Offering task and to administrators on enrollment tasks to search the offerings table and save results under a personalized name for future use. Example: Berlin Location.
- Workday recommends that users with access to the *Manage: Facilitated Enrollments* domain don't have access to the *Manage: Learning Course Enrollments* domain. This setup ensures they can only enroll learners that they have access to.

Requirements

Create user-based security groups to enable specific users to manage enrollments for your organization.

Limitations

- You can't cancel completed enrollments that have an associated equivalency record, learning assignment, expiration date, or pricing period.
- You can only amend enrollment results for digital lessons that haven't started or are in progress.

Tenant Setup

Use the Edit Tenant Setup - HCM task to:

- Express enrollment interest in courses when no suitable offerings are available to them in a specified location and date range.
- Rate courses that they're enrolled in and any stand-alone lessons in the learning catalog.

Security

Domain	Considerations
Manage: Facilitated Enrollments	Enables selected users to access to the Find Workers to Enroll report to manage enrollments for blended and digital courses.
Manage: Learning Course Enrollments	Enables selected users to access administrative based enrollment tasks. Users with access to this domain can manage multiple tasks that support enrollment processes. You can configure unconstrained access for users or restrict access using learning security category or topic segments.
Manage: Mass Enrollments	Enables selected users to access these tasks: • Mass Drop by Role • Mass Enroll by Role
Manage: Unrestricted Mass Enrollments	Enables users to access the Find Workers to Enroll report and these tasks: • Learning Mass Enroll • Mass Drop
Reports: Learning Record	Enables users to access reports that display enrollment data on learning records.

Business Processes

Business Process	Description
Cancel Learning Enrollment	Enables you to cancel an enrollment for a course offering.
Drop Learning Enrollment	Enables you to manage when a learner can drop an enrollment for a program, a course offering, or a digital course (both internal and external).
Enroll in Content	Enables you to manage how a learner can enroll in a course offering or a digital course (both internal and external).
Mass Cancel Learning Enrollments	Enables you to cancel multiple enrollments for 1 or more course offerings.
Mass Enroll	Enables managers to enroll their teams in a course or program.

Reporting

Report or Dashboard	Description
Find Workers to Enroll	Find and enroll specific workers in learning content.
Learner Engagement	Evaluate enrollments and completions so you can examine why some learners engage more than others. The report only displays data for the last complete month.
Learning Trainer dashboard	Provide assessors and instructors with access to tasks and reports so they can manage enrollments for course offerings.
My Team's Learning	Track progress in enrolled content for all direct reports and pre-hires.

Integrations

Web Service	Consideration
Admin Drop Learning Enrollment	Enables you to drop learners from learning content as an action on the Drop Learning Enrollment business process. You can drop enrollments with these registration statuses: • Enrolled • Enrolled – Pending Prerequisites • Waitlisted
Bulk Import Admin Drop Learning Enrollment	Enables you to drop learners from the learning content in high volumes as an action on the Drop Learning Enrollment business process.

Web Service	Consideration
Cancel Learning Enrollment	Enables you to cancel enrollments in upcoming course offerings and add reasons for the cancellation. You can also cancel incomplete enrollments that are linked to open learning assignments.
Enroll in Learning Content	Enables you to enroll learners into learning content. Respects due dates that you set when you mass enroll learners using this web service.
Put Learning Enrollment	Enables you to update or create legacy enrollments. You can also prevent enrollments from displaying in learning transcripts or reports by not selecting the Display Equivalency Records on Learning History check box when creating an equivalency rule.
Put Learning Enrollment Pricing Record Document Payment Status	Enables you to update payments listed on pricing records or enrollments to reflect payments processed in third-party systems.

Connections and Touchpoints

Touchpoint	Consideration
Absence	Workday displays warning messages when an enrollment conflicts with a scheduled absence.
Career and Development Planning	Workday Learning helps learners identify courses ranked highest by workers in their positions on their Opportunity Graph so they can enroll in this content.
Talent	Use Talent Marketplace to suggest content in which learners can enroll to improve their skills.

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: Opportunity Graph on page 1540

Setup Considerations: Talent Marketplace on page 1569

Tasks

Steps: Set Up Workday Everywhere on page 2997

Create Role-Based Security Groups

Mass Enroll Learners on page 2081

Mass Drop Learners on page 2084

Manage Waitlists for Learning Course Offerings on page 2086

Manage Schedules and Grading and Attendance on page 2087

Create and Manage Reminders for Learning Content on page 2090

Reset Learning Due Dates on page 2091

Reference

Reference: Learning Records and Report Data Sources on page 2098
Reference: Workday-Delivered Reports for Learning on page 2102
2021R1 What's New Post: Enroll in Content Approval Notifications in Workday for Microsoft Teams
2021R1 What's New Post: Enroll in Content Approval Notifications in Workday for Slack

Mass Enroll Learners

Prerequisites

Create a course offering or digital course.

Context

Workday enables you to manage learner enrollments in a number of different ways depending on your access level. You can use different methods to mass enroll learners into a course offering or digital course.

Steps

1. (Optional) Create Learning Prerequisite Rules on page 2011.
2. (Optional) Create Role-Based Security Groups.

   You can create constrained and unconstrained role-based security groups to provide access to users to mass enroll learners. Example: You can provide constrained access by role to users who belong to 1 of these security group types:

   - Extended Enterprise Affiliation
   - Location Hierarchy
   - Supervisory Organization
3. Access 1 of these tasks or buttons depending on your access level:

Access Level	Method	Description	Security
Learning Administrator	*Learning Mass Enroll*	You can use a custom search report for administrator enrollment that includes this mass action. This method enables you to: • Enroll learners in course offerings that have reached their Maximum Enrollment Capacity or that have a status of *Closed* or *In-Progress*. • Override custom validations.	These domains in the Learning Core functional area: • *Learning Access* • *Set Up: Learning Catalog* • *Manage: Learning Course Enrollments* • *Manage: Unrestricted Mass Enrollments*

Access Level	Method	Description	Security
		• Override prerequisite rules. • Specify whether content is required learning.	
Constrained access by role	Mass Enroll by Role	This method enables you to: • Enroll learners in course offerings that have reached their Maximum Enrollment Capacity or that have a status of *Closed* or *In-Progress*. • Override custom validations. • Override prerequisite rules. • Specify whether content is required learning.	*Manage: Mass Enrollments* domain in the Learning Core functional area
Manager	Enroll my Team	You can use this button on these reports if you configured the *Mass Enroll* business process: • View Course • View Digital Course This method: • Enables you to specify whether the content is required learning. • Adheres to enrollment limits and	*Learning Access* domain in the Learning Core functional area

Access Level	Method	Description	Security
		custom validations. • Adheres to prerequisite rules. If required, Workday displays the course on these worklets on the Learning dashboard for each team member: • Required for You • Progress > Required	
Other users with constrained or unconstrained access	Learning Facilitated Enroll	Run the Find Workers to Enroll report and access this task if you configured the *Mass Enroll* business process. This method: • Enables you to specify whether the content is required learning. • Adheres to enrollment limits and custom validations. • Adheres to prerequisite rules. • Uses the *Mass Enroll* business process to route enrollment requests for review and approval.	These domains in the Learning Core functional area: • *Manage: Facilitated Enrollments* (Provides constrained access to enroll learners) • *Manage: Learning Course Enrollments* (Provides unconstrained access to enroll learners) • *Manage: Unrestricted Mass Enrollments*

4. (Optional) Use the *Save* filter to search through columns in the table and save your results under a personalized name for future use. Use the trash bin icon beside the Saved Filters field when you want to delete a saved filter.
5. (Optional) Create custom reports using the Learning Enrollments report data source.
6. (Optional) Add a due date or duration when you enroll learners.

Result

Workday mass enrolls the selected learners in a course offering or digital course.

Next Steps

- Managers can run the My Team's Learning report if configured on the My Team Management dashboard.
- Managers can select the Skip Enrollment Approval option on the Create Program and Edit Program tasks to enable learners to skip enrollment approval for content within a program.
- Use the Cancel Learning Enrollment and Mass Cancel Learning Enrollments business processes to control and manage enrollments for 1 or more course offerings. Access the Create Business Process Definition (Default Definition) task to set them up before using them.
- Access the Maintain Cancel Enrollment Reason Categories task and View Cancel Enrollment Reason Categories report to create and view reasons for canceled enrollments in your organization.

Mass Drop Learners

Prerequisites

- Create a course offering, program, or a digital course.
- Enroll learners.

Context

Workday enables you to manage learner enrollments in a number of ways depending on your access level. You can use different methods to mass drop learners from a course offering or digital course.

Learning administrators can cancel a single enrollment for a learner or they can perform a mass cancel action for a larger group of enrollments. You can also create user-based security groups to enable specific users to manage enrollments for your organization.

See: ../../../authentication-and-security/configurable-security/security-groups/role-based-security-groups/fyv1570811031746.dita.

Steps

1. (Optional) Create Role-Based Security Groups.

   You can create constrained and unconstrained role-based security groups to provide access to users to mass drop learners. Example: You can provide constrained access by role to users who belong to 1 of these security group types:

   - Extended Enterprise Affiliation
   - Location Hierarchy
   - Supervisory Organization
2. Access 1 of these tasks, buttons, or web services depending on your access level:

Access Level	Method	Description	Security
Learning Administrator	Admin Drop Learning Enrollment Bulk Import Admin Drop Learning Enrollment	These web services are initiating actions on the Drop Learning Enrollment business process, enabling you to drop learners from learning content. For high volumes, we recommend	Secured to the Learning Core functional area

Access Level	Method	Description	Security
		using the Bulk Import Admin Drop Learning Enrollment web service. You can drop these types of enrollments: • Enrolled • Enrolled – Pending Prerequisites • Waitlisted With these web services: • You can only drop enrollments in an incomplete status. • You can't drop enrollments that have in-progress business process events. • You can only use an active drop reason that's in an active reason category. • The Drop Reason field is optional by default. To make the Drop Reason a required field, access the Configure Optional Fields task and select the Enforce Required in Web Service check box. These web services are meant for administrator use and don't support custom errors and warnings	

Access Level	Method	Description	Security
		configured using the Maintain Learning Validations task.	
Learning Administrator	Drop Learners	This button on these reports initiates the *Learning Mass Drop* job: • View Course • View Digital Course The Mass Drop task then displays: • All enrolled learners. • Any learners who are pending enrollment approval. • Details of all related prerequisites for the content.	*Manage: Learning Course Enrollments* domain in the Learning Core functional area
Learning Administrator	Related Actions Menu	You can mass drop learner enrollments using the related actions menu on the Admin view of a program or on the Learner view of a course.	*Manage: Learning Course Enrollments* domain in the Learning Core functional area
Constrained access by role	Mass Drop by Role	This task enables you to drop learners if you belong to a security group with constrained access by role. Example: HR Partner	*Manage: Mass Enrollments* domain in the Learning Core functional area

Result

Workday mass drops the selected learners from a course offering or digital course.

Manage Waitlists for Learning Course Offerings

Prerequisites

- Create a blended course and course offering.
- Specify a Waitlist Capacity value to set up a waitlist and enable learners to join it when enrollment reaches full capacity.

- Security: These domains in the Learning Core functional area:
    - *Set Up: Learning Catalog* and *Manage: Learning Course Enrollments* for learning administrators.
    - *Self-Service: Learning Instructor* for primary instructors.

Context

If you don't configure auto-enrollment, you can manually enroll learners from the waitlist.

Steps

1. Access the Manage Waitlists report.
2. To enroll learners manually on a course offering from the waitlist, click Manage beside the offering.
    a) In the Waitlisted section, select the check boxes beside the learners you want to enroll.
    b) Click Enroll.
3. (Optional) To view the waitlist for an offering that has no enrollment capacity, click View.

Result

If enrollments for the course offering reach full capacity after you enroll learners from the waitlist, Workday no longer displays the offering in the Waitlists Requiring Action section.

Manage Schedules and Grading and Attendance

Prerequisites

Security: These domains in the Learning Core functional area:

- *Manage: Learning Course Enrollments*
- *Manage: Create and Edit Learning Roles*
- *Self Service: On the Job Training*
- *Self Service: Learning Assessor*
- *Self-Service: Learning Instructor*
- *Set Up: Learning Catalog*

Context

As a learning instructor, you deliver instructor-led in person or virtual classroom lessons for course offerings. As a learning assessor, you assess training activity lesson content for course offerings. You can also designate multiple experts to assess each enrollment in a course offering with training activity lesson content for course offerings, including grading work and recording attendance. Workday enables you to manage your schedule and the grading and attendance roster for lessons that you deliver or assess from the Learning Trainer dashboard. You can enter grading and attendance results for learners enrolled in a course offering, if you select Track Attendance and Track Grades on 1 or more lessons.

Steps

1. (Optional) Set up learning assessors.

    See Steps: Set Up Learning Assessors.
2. Access the Instructor Schedule Calendar report.

    This report display calendar entries for lessons in course offerings in your course-delivery schedule. Note that Workday automatically localizes the start and end dates and times for the classroominar lessons that you deliver, based on your preferred time zone. Classroom training lessons display in the time zone of the location on the lesson.
3. Select a calendar entry to view more details about the lesson, including the location for classroom training.

4. (Optional) Click View Course to view the course details and add the schedule to your calendar.
5. Click Manage Roster to access the Manage Grading and Attendance task.
6. Enter grading and attendance results.

   The Overall Grade tab enables the primary instructor, assessors for the course offering, or a learning administrator to enter the overall attendance, score, and grade for the course for each enrolled learner. You can also enter results for each lesson on the Lessons tab.

   Before submitting the overall results, click View Results to review individual lesson results for each enrolled learner.

   If you're an instructor but not the primary instructor, or a learning administrator, the Lessons tab enables you to enter results for the lessons that you deliver. If you're an assessor, you can enter results for training activity lessons using the Lessons tab. Primary instructors and learning administrators can override the results for each lesson. An assessor can override the results for training activity lessons.

   Note that Workday doesn’t support editing existing attendance statuses or adding additional statuses.

Result

When you set Track Attendance and Track Grades on instructor-led lessons in a course offering, Workday considers the enrollment complete when:

- All required lessons within the course are complete.
- The primary instructor, assessor, or learning administrator has entered the overall attendance and grade for the course.

When at least 1 instructor-led lesson in a course offering tracks grades or attendance, the grading and attendance details display on the Grading and Attendance tab of the view course information report.

We also display Lesson Results for individual lessons on the View Lesson report after the lesson completes.

Next Steps

In custom reports, you can report on lessons a learner has completed within a course. Use report fields on the Lesson Tracking business object (secured to the *Public Reporting Items* domain).

On the Learning Enrollment business object, these report fields display results for the overall course:

- Course Attendance Status
- Course Grade
- Course Score

Related Information
Tasks
Steps: Set Up Learning Assessors on page 1889

Manage Enrollment Completion

Prerequisites

Security: These domains in the Learning Core functional area:

- *Manage: Learning Course Enrollments*
- *Set Up: Learning Catalog*

Context

When learners complete a blended or digital course that contains a lesson with packaged content, a video with interactions, or a survey, sometimes the completion results don't pass back to Workday. Example: If learners experience a network connectivity issue while playing SCORM content, their device might cache the lesson locally and they can complete it, but Workday doesn't record the results. You can manually complete the enrollment on their behalf, so learners don't have to retake the course, giving you an additional level of control when needed. You can also manually enter the score and grade if Provide Course Grade is set on the media lesson in the course.

You can change enrollment results only for courses that have *Not Started* or *In Progress* completion status. You can't change the enrollment results after you enter the results manually and mark a course as *Complete*. You can change enrollment results as completed only if you change the tracking status of all lessons in an enrollment as completed.

To complete or enter results for instructor-led lessons, use the Manage Grading and Attendance task. See: Manage Schedules and Grading and Attendance.

Note that Workday doesn’t support manually marking standalone lessons as complete.

Steps

1. Run the Manage Learning Content report and search for the course.
2. Select the course for which you want to complete enrollment.
3. In the view course report, click the Enrollments tab.
4. Select the enrollment that you want to complete on behalf of a learner.

   You can change enrollment results only for courses that have *Not Started* or *In Progress* completion status and *Enrolled* enrollment status.
5. On the View Learning Enrollment report, click Manage Completion.
6. Enter these values:

Tracking Status	Completion Date and Time
Select *Completed*.	Enter a completion date and time.

   Enter a score and grade, if applicable.

   You can change enrollment result as completed only if you change the tracking status of all lessons in an enrollment as completed.
7. Select the Confirm check box to save your changes.
8. Click OK.

Next Steps

Create an advanced custom report to view which courses contain lessons that you've manually assessed. Use these reporting items:

- Learning Enrollments data source.
- Enrollment Manually Assessed report field on the Learning Enrollment business object.
- Lesson Manually Assessed report field on the Lesson Tracking business object.

See: Create Custom Reports.

Run the custom report and filter the enrollments by worker. Verify that Workday marked the enrollment and lessons as manually assessed.

Create and Manage Reminders for Learning Content

Prerequisites

- Enable reminders.

  See: Reference: Edit Tenant Setup - Notifications.
- Specify an expiry period when creating or editing content or, add a due date or duration when you enroll learners into a course offering or digital course.
- Security: *Administer Campaigns* domain in the System functional area.
  - These domains in the Learning Core functional area:
    - *Manage: Learning Content*
    - *Manage: Learning Course Enrollments*
    - *Set Up: Learning Catalog*

Context

You can notify learners of upcoming due dates by configuring reminders for courses and programs. You can also copy managers and HR business partners (HRBP) on reminders generated from learning content. Use role assignments in a supervisory organization to define the HRBP.

When you configure reminders for content with expiry periods, learners automatically receive a notification when an enrollment they've completed has an upcoming expiration date. The reminder notifies learners that they should re-enroll in the content before the expiration date, enabling you to comply with local regulatory requirements. The reminders are based on the expiration date on the enrollment, including self-enrollments.

Steps

1. Access the Manage Learning Content report.
2. Select the content that you want to create a reminder for.
3. On the administrator view for the course or program, select Create Reminder from the More menu.

   You can create reminders before or after assigning learning content to learners. Workday sends updated reminders on the correct due date if you make a change to a non-recurring reminder or reset a due date.
4. Configure the reminder details on the Create Reminder task.

   As you complete the Send Date section, consider:

Option	Description
Send Reminder	Select if you want to send the reminder on, before, or after the expiration or due date of the content.
Set as a Recurring Reminder	Select this check box if you want to resend the reminder daily or weekly.
Send Until the Number of Reminders Reaches	Enter the number of days or weeks that you want the reminder to recur.

Result

Learners receive automatic reminders when content they've enrolled in has an upcoming expiry or due date.

Example

You configure a reminder send on the due date, and then want to send regular reminders after the due date has passed. To send 1 reminder 1 week after the due date:

- Select *Weekly* on the Reminder Frequency prompt.
- Enter *1* on the Send Until the Number of Reminders Reaches prompt.

To send reminders every day for 3 days after the due date:

- Select *Daily*on the Reminder Frequency prompt.
- Enter *3* on the Send Until the Number of Reminders Reaches prompt.

Next Steps

- You can change the reminder settings by accessing the content and selecting Manage Reminders from the More menu. The Manage Reminders option displays after you've created at least 1 reminder.
- You can mass reset expiry periods for completed learning records by accessing the Reset Expiration Date on Learning Records task. Select at least 1 completed learning record on a course or program with a future expiration date. When you use this task to reset existing expiry periods to zero, Workday:
    - Updates the Latest Successfully Completed Enrollment report field on the Learning Enrollment business object to indicate that it's not the latest successfully completed enrollment with an expiration date for a learner.
    - Removes any associated reminders for the learner.

Related Information

Reference

Reference: Edit Tenant Setup - Notifications

Reset Learning Due Dates

Prerequisites

Security: *Manage: Learning Assignments* domain in the Learning Core functional area.

Context

When you campaign required learning, you can set due dates for learners to indicate when they need to complete the content. When due dates apply to content, Workday displays the date on the content thumbnail image on the Learning dashboard and on these reports:

- View Course
- View Digital Course
- View External Lesson
- View Learning Path
- View Learning Lesson
- View Learning Program

When learners don't complete required content by the due date, we display a status of *Overdue* on their content thumbnail images. The Required for You worklet sorts content by due date to help learners prioritize their required learning.

You can reset due dates on required learning content for specific learners, overriding due dates on the learning campaigns. When you reset due dates, we automatically reset expiration dates. We always keep due dates and expiration dates in sync. When the content has been assigned by a campaign, you can't extend the due date beyond the end date of a campaign.

Example: When learners take extended leave, they might need more time to complete their required learning.

Steps

1. Access the Reset Learning Due Dates task.

   This task enables you to view learning campaign assignment or mass enroll details by learning content, learner, or both.
2. Select 1 of these Reset Method options:

Option	Description
Select New Date	Enter a new due date.
Extend Current Due Date by Duration	Select a duration type, and enter the number of days, weeks, or months.

3. Select the check box for the learner assignment that you want to reset.
4. Review the Proposed Due Date before you confirm your changes.

Result

Workday updates the *Item Due Date* for the learner to the reset date. We record the due date that applied to the campaign item for the learner before you reset it as *Item Due Date without Reset*. When you reset the due date, Workday sets the *Manual Expiration Override* flag to Y (true) so that the background job will no longer recalculate the due date you reset manually.

Related Information

Concepts

Concept: Expiry Periods for Learning Content on page 2014

Tasks

Steps: Set Up and Launch Learning Campaigns on page 1973

Steps: Waive Learning Assignments

Context

You can manually waive a single assignment or mass waive multiple assignments for learners in your organization when they:

- Receive an assignment in error.
- No longer need to complete the content.

You can only waive learning assignments with a status of *Open*.

When you waive an assignment, the enrollment remains *Open* and active until either:

- The learner drops the enrollment.
- You drop the learner from the enrollment using mass drop.

If a learner drops an enrollment, or is dropped by a mass drop action, and the learning assignment is still *Open*, you can manually waive the assignment for the learner, if applicable.

Note: Workday automatically waives open learning assignments when an administrator removes the associated content from a Learning campaign or Engagement. In this scenario, manual waiving isn’t required.

Steps

1. Access the Maintain Learning Assignment Waive Reasons task.

   Create or edit reasons that users who manage learning assignments can select when waving assignments. Example:

   - *On extended leave*
   - *Sent in error*

   Security:

   - *Manage: Learning Assignments* in the Learning Core functional area.
   - *Set Up Learning Catalog* domain in the Learning Core functional area.
2. Access the related actions menu from the learning assignment you want to waive to manually waive a single assignment.

   Access the Waive Learning Assignment task to mass waive multiple assignments.

   You can search for learning assignments to waive by either Learning Content, or Learners, or both. You can select multiple values for each one. Workday also displays a table listing eligible and ineligible assignments for waiving.

   For Learning Content, if you select a program, Workday waives the entire program and not individual content items within the program.

   Security: *Mass Waive Learning Assignments* business process in the Learning Core functional area.
3. (Optional) Select a Waive Reason.

   Select 1 or more learners to waive.
4. (Optional) Access the Manage Learning Assignment Waive to undo a waive for a specific learning or group or learners.

   You can also undo a waive by rescinding the *Waive Learning Assignments* business process event.

   Security: *Manage: Learning Assignments* domain in the Learning Core functional area.

Result

When you waive a learning assignment, Workday creates a business process event. The Assignment Status on the learning assignment record for the learner changes to *Manually Waived*. For required learning, Workday removes the content from the learner's Required for You worklet on their Learning dashboard. When you waive a retraining assignment, the assignment remains waived until further action is taken such as undoing the waive or creating a new initial assignment, even if the enrollment has an expiration date.

Next Steps

You can access the Assignments tab on a learning content item to view, filter, and manage learning assignments related to a piece of content.

Aditionally, you can create a custom report that indicates the assignment status of learners for a learning content item, using either of these data sources:

- Learning Assignments by Learning Organization
- Learning Assignment Records

Include these report fields for each worker or extended enterprise learner to verify the waive results:

- Assignment Status
- Assignment Cancellation Date
- Learning Assignment
- Learning Assignment Waive Activity
- Learning Assignment Waive Events
- Learning Content

- Permanent Waive
- Proposed Waive Assignment Reason
- Waive Cancelled By
- Waive Cancellation Moment
- Waive Reason
- Waived By
- Waived By Worker

You can use the View Learning Assignment Waive Reasons report to view waive reasons for waived learning assignments.

If you waive a required assignment, you can then reassign the content as required or nonrequired.

Related Information
Reference
2023R2 What's New Post: Waive Learning Assignments
2025R2 Feature Release Note: Automatically Waive Assignments Upon Content Removal from Campaigns

Concept: Learning Assignments

Learning Assignments supports compliance management in your organization, by enabling you to report on all assigned content for learners using constrained data sources.

Learning Assignment Mechanisms

Workday creates learning assignment records for learners as a result of these assignment mechanisms, both required and nonrequired:

Assignment Mechanism	Description
Campaign	Indicates that a learning campaign assigned the content to the learner.
Learning Mass Enroll	Indicates that the assignment is as a result of: • Learning administrator enrollment using a Learning Mass Enroll mass action on a custom search report. • Constrained access by role. • Learning facilitated enroll.
Manager Enroll	Indicates that a manager enrolled the learner as part of a team.
Retraining	Indicates that Workday created the assignment automatically. When a learner completes learning content, Workday creates a new assignment record that enables you to manage retraining requirements effectively. You can: • Track learners during the retraining cycle. • Identify when Workday waives learner assignments automatically or as a result of a manual waive. • Plan retraining. Example: When a large number of learners have enrollments that expire around the same time, and the retraining includes instructor-led training,

Assignment Mechanism	Description
	you can identify and plan for additional course offerings in advance. Workday uses the Expiration Dateon the learning record to populate the Due Date on the next assignment record. A daily background job recalculates due dates on retraining assignment records based on your Expiry Period settings. Workday creates an assignment record for retraining requirements when you add Expiry Period settings to learning content using these tasks: • Edit Course • Edit Program • Reset Expiration Date on Learning Records If learners have enrollments for a course, Workday associates the assignment records with the enrollments. Workday updates the Due Date on retraining assignment records when: • You change the expiration date for the learning record using theReset Expiration Date on Learning Records task. • The *Put Learning Enrollment* web service operation updates the expiration date for the enrollment. Workday returns the learning content to the Required for You worklet on the Learning dashboard when the learner needs to retake the content.

Learning Assignment Statuses

An assignment record can have 1 of these statuses:

Status	Description
Open	The learner needs to take action on this assignment.
Completed	The learner has successfully completed the associated content to satisfy the assignment record. When a learner completes an assignment, Workday updates the Assignment Record Completion Moment field on the record. When you assign content to a learner that has equivalent content, if the learner completes the equivalent course or courses and gains an equivalency, this satisfies the requirements of the assignment. We then update the status of the

Status	Description
	assignment record and any equivalent assignment record to *Completed*.
Automatically Waived	• The learner no longer meets the campaign audience criteria: The *Enable dynamic removal and resend* option is set on the Exclusion Rule prompt for a learning campaign, and the learner no longer meets the audience criteria. Workday removes the learner from the audience dynamically. • The learning administrator removes content from a campaign or engagement. In both scenarios there's no need for the learner to complete the assignment, so Workday: • Waives the assignment automatically and updates the Assignment Cancellation Date field on the record. • Removes required learning content from the Required for You worklet on the Learning dashboard.
Manually waived	A learning administrator manually waived the learner from the assignment using the Waive Learning Assignment task because there's no need for the learner to complete the assignment, so Workday: • Updates the Assignment Cancellation Date field on the record. • Removes required learning content from the Required for You worklet on the Learning dashboard.

Concept: Waitlists for Learning Course Offerings

If you enter a Waitlist Capacity value and select the Enable Auto-Enrollment from the Waitlist check box on these tasks for a blended course, Workday automatically enrolls learners from the waitlist when space in a course offering becomes available:

- Create Course
- Edit Course
- Edit Course Offering
- Schedule Course Offering

Workday also secures waitlists to the context of primary instructors so that they can view and manage waitlists for the course offerings that they deliver.

Workday provides these reports and tasks to enable you to view and manage waitlists:

Reports and Tasks	Description
Manage Waitlists	You can access this report in global search or select the Manage Waitlisting menu on the Learning Admin dashboard. Learning instructors can access this report on the Instructor Dashboard. This report displays 2 sections:

Reports and Tasks	Description
	• Waitlists Requiring Action: Lists course offerings that aren't configured with the Enable Auto-Enrollment from the Waitlist option, but have learners on a waitlist and enrollment capacity. • All Other Waitlists: Lists course offerings with an active waitlist, but no enrollment capacity. You can drill into an offering to view and manage its waitlist.
Manage Waitlist	Enables you to enroll learners manually on a course offering from its waitlist. To access this task, click Manage beside the offering on the Manage Waitlists report. You can also access this task from the View Course report. Select either: • More > Manage Waitlist. • On the Administrative tab, as a related action on the *Course Offering*, select Course > Manage Waitlist.
View Waitlist	Displays all learners on the waitlist for a course offering. You can access this report from the View Course report by either: • Selecting More > View Waitlist. • On the Administrative tab, as a related action on the *Course Offering*, selecting Course > View Waitlist.

Enrollment Types That Relate to Waitlists

The Enrollment Type report field on the Learning Enrollment Event business object provides status values for learning course enrollments from the Registration Record Status business object. We display these status values when you access these reports:

- Course: On the Enrollments tab in the Enrollment Status column of the Enrollments grid when viewing enrollments for course offerings.
- View Blended Course: On the Schedule tab in the Enrollment Status column of the History grid.

We also display these values to learners on the Schedule tab of the View Course report. The Enrollment Status column of the History grid displays the enrollment type after learners try to waitlist on a course.

Enrollment Type	Description
Waitlisted	Displays when a learner tries to enroll in a course offering that's full and joins a waitlist.
Waitlist - Closed	Displays when a course offering closes while the learner is on a waitlist for the offering. Learners can't enroll even if there are seats available. Workday records a drop date for the offering for each learner on the waitlist so that they can enroll in another offering.

Enrollment Type	Description
Waitlisted - Pending Approval	Displays when a learner tries to join a waitlist for a course offering that's full and requires approval. Workday displays this status until the approval step completes. The status then moves to *Waitlisted* if the offering is still open. If a seat becomes available, once approved and Enable Auto-Enrollment from the Waitlist is set for the course or course offering, Workday automatically enrolls the next learner from the waitlist. If the approval remains pending and another learner joins the waitlist, Workday enrolls that learner on the course before the learner with the pending approval. When the approval step completes, and Enable Auto-Enrollment from the Waitlist is set for the course or course offering, Workday automatically enrolls the learner and the status moves to *Enrolled* if: • The Maximum Enrollment Capacity for the course offering increases. • Seats become available due to learners dropping their enrollments, or mass drop enrollments by learning administrators or users with constrained access.

Reference: Learning Records and Report Data Sources

Record Types

Workday provides several types of learning records to enable you to track and report on learning:

Learning Record Type	Description
Enrollment	Workday creates this record type for learners when: • They enroll themselves in learning content. • Their manager enrolls them. • You enroll them using administrator mass-enroll or constrained mass-enroll by role. See: Manage Enrollment Completion on page 2088.
Equivalent	Workday creates this record type for learners for each equivalent course when they complete a course that's equivalent to 1 or more courses. See: Create Learning Equivalency Rules on page 2009.
Historical Tracking	For historical tracking purposes, you can create a shell of a course for noncatalog content using

Learning Record Type	Description
	the *Put Learning Imported Content* web service. You can't search for or edit this content, but Workday displays associated records on the learner's transcript. Workday creates this record type for learners when you use the *Put Learning Imported Record* web service to import large volumes of historical records for noncatalog content. You can only view historical records on the Learning tab of a worker's Career page or on the Learning Transcript tab of Extended Enterprise profiles.
Learning Assignment	Workday creates assignment records when learners are assigned content, both required and non-required learning. The record provides detailed information about the learning assignment, indicating whether it was created: • Automatically for retraining purposes based on the expiration date on an enrollment. • By manager or mass-enroll. • By a learning campaign. See: Concept: Learning Assignments on page 2094.
Learning Engagement	Workday creates learning engagement records for learners when you create learning campaigns to promote content or assign required learning. See: Steps: Set Up and Launch Learning Campaigns on page 1973.
Learning	The learning record details for a learner. Workday records: • Media tracking for learning course content items and stand-alone lessons. • Enrollments for course content items in learning programs and tracking for stand-alone lessons.
Learning Enrollment Pricing Record	Workday creates this record type when learners enroll into a pricing enabled course.
Tracking for Lesson	Workday creates this record type when learners start or complete a stand-alone lesson.

Learning Report Data Sources

Learning includes these report data sources (RDS):

RDS	Description
Learning Assignments by Learning Organization	A combined and indexed RDS that enables you to manage your learning compliance from a single place. It provides constrained access to learning

RDS	Description
Security: These domains in the Learning Core functional area: • *Person Data: Learning* • *Reports: Learning Record* • *Self Service: Learning*	assignments for workers and extended enterprise learners in a specific: • Affiliation • Location hierarchy • Supervisory organization You can use this RDS in custom reports to find out who has completed learning across the organization, and the learning assignment mechanism. You can only report on learners who you have permission to access. Because this data source combines assignments with worker data, you can also add worker information to the report. Workday doesn't create an assignment record in the case where a learner chooses to take content and self-enrolls. A learner must have a successfully completed enrollment to complete the assignment.
Learning Assignment Records Security: These domains in the Learning Core functional area: • *Person Data: Learning* • *Reports: Learning Record* • *Self Service: Learning*	Provides constrained access to learning assignments for workers and extended enterprise learners in a specific: • Affiliation. • Location hierarchy. • Supervisory organization. Learning administrators have unconstrained access to the data, unlike learners and managers who have contextual access, based on their role in a supervisory organization. You can use this RDS in custom reports to find out who has been assigned learning content across the organization, including the assignment mechanism, assignment status, and assignment completion data. You can only report on learners whom you have permission to access.
Learning Content Security: These domains in the Learning Core functional area: • *Learning Access* • *Manage: Learning Content* • *Manage: Learning Course Enrollments* • *Set Up: Learning Catalog*	Provides access to internal learning content data, including: • Blended courses. • Course offerings. • Digital courses. • Programs. • Stand-alone lessons.
Learning Enrollments Security: These domains in the Learning Core functional area: • *Person Data: Learning* • *Reports: Learning Record* • *Self Service: Learning*	A subset of learning records. Provides access to learning enrollment data for enrollments associated with an assignment or standalone enrollments. Example: A learner chooses to take learning content and enrolls, creating a self-enrollment record. Workday uses contextual security to determine if a user has permission to access the instances in an RDS. There are 3

RDS	Description
	groups of users within your organization who need contextual access to enrollment data: • Learners need to view their own enrollments. • Managers need to view their own enrollments and the enrollments of their direct reports. • Learning administrators need to view all enrollments. Also provides constrained access to learning enrollments for workers and extended enterprise learners in a specific: • Affiliation. • Location hierarchy. • Supervisory organization. Workday uses these domains in the Learning Core functional area to secure the RDS and ensure that users have contextual access to the data: • *Self Service: Learning* for learners. • *Person Data: Learning* for managers. • *Reports: Learning Record* and *Manage: Learning Course Enrollments* for learning administrators. Learning administrators have unconstrained access to the data, unlike learners and managers who have contextual access, based on their role in a supervisory organization. Workday-delivered reports that use this RDS include: • Learner Engagement • Learning by Length of Service • My Team's Learning You can use this RDS in custom reports to print a completion certificate using a business form layout. See Steps: Create a Business Form Layout.
Learning Equivalency Record Security: These domains in the Learning Core functional area: • *Learning Access* • *Manage: Learning Content* • *Set Up: Learning Catalog*	Enables you to track who has achieved equivalencies and which courses they completed to achieve the equivalency.
Learning Interests Security: These domains in the Learning Core functional area:	Enables you to track expressions of interest in blended courses for learners. Example: To help learners identify when you've scheduled courses they're interested in, you can create a

RDS	Description
• *Person Data: Learning* • *Reports: Learning Record* • *Self Service: Learning*	custom report that includes the Matching Offerings Scheduled report field.
Learning Record Security: These domains in the Learning Core functional area: • *Person Data: Learning* • *Reports: Learning Record* • *Self Service: Learning*	Provides a detailed overview of the learner's activity as it enables you to track combined data on: • Equivalencies. • Historical tracking imported content. • Learning enrollments, including self-enrollments. • Media tracking. Workday displays this data on the learner's transcript.
Learning Trainer Security: These domains in the Learning Core functional area: • *Manage: Create and Edit Learning Roles* • *Reports: Archives External Learning Users*	Enables you to track all the assessors and instructors.
Indexed Learning Campaign Records Security: *Reports: Learning Campaign Records* in the Learning Core functional area.	Provides access to campaign items sent to workers, enabling you to track who has been assigned campaign items and their due dates.

Reference: Workday-Delivered Reports for Learning

These Workday-delivered reports provide insight into the value and effectiveness of learning.

Report	Description
Courses and Lessons Created (Last 12 Months) Security: *Set Up: Learning Catalog* domain in the Learning Core functional area.	Monitors the rate at which users who have access to Learning in your organization create learning content. The report displays the creation rate for 3 data sets: • Blended course offerings by learning administrators. • Digital courses by learning administrators. • Stand-alone lessons by all learners.
Find Learning Assignments Security: These domains in the Learning Core functional area: • *Person Data: Learning* • *Reports: Learning Record*	Allows you to search for learning assignments based on learning content.
Learning by Length of Service Security: *Reports: Learning Enrollment* domain in the Learning Core functional area.	Analyzes learning engagement across the organization by worker length of service. Use this report to identify whether there are sections of the worker population who aren't engaging with learning and investigate why.

Report	Description
Learning Campaign Security: *Administer Campaigns* domain in the Learning Core and System functional area.	Displays a summary of learning campaigns for the last 12 months. We don't automatically enroll from campaigns so a corresponding enrollment is only created when a learner enrolls or is enrolled into content. A campaigned record only moves to *Complete* when the learner successfully completes an associated enrollment.
Learning Content by Rating Security: *Set Up: Learning Catalog* domain in the Learning Core functional area.	Helps you identify the learning courses and stand-alone lessons that are performing poorly as well as the highest performing content in your tenant.
Learner Engagement Security: *Reports: Learning Record* domain in the Learning Core functional area.	Evaluate learner engagement in terms of learning enrollments and completions, so you can start to examine why some learners are engaging more than others. The report displays learner engagement data for the last complete month only.
Manage Learning Prerequisite Rules Security: These domains in the Learning Core functional area: • *Manage: Learning Content* • *Set Up: Learning Catalog*	Helps you to identify and manage all prerequisite rules for learning content in your tenant.
My Course Offerings Security: These domains in the Learning Core functional area: • *Self-Service: On the Job Training* • *Self-Service: Learning Instructor*	Displays information for all course offerings that relate to a user's role as an assessor or instructor, including: • Course Name • Dates • Enrolled Learners • Location • Trainers
My Express Interest on Courses Security: These domains in the Learning Core functional area: • *Manage: Learning Content* • *Set Up: Learning Catalog*	Helps you identify learner demand in courses.
My Team's Learning Security: *Person Data: Learning* domain in the Learning Core functional area.	Displays a summary of learning progress for all direct reports and pre-hires, including: • Attendance Status • Completion Status • Enrolled Content You can configure the report to display on the My Team Management dashboard.

Report	Description
My Team's Learning Assignments Security: *Person Data: Learning* domain in the Learning Core functional area.	Displays a summary of learning progress for managers. It returns Learning Assignment and Learning Enrollment data, including: • Assignment Status • Attendance Status • Completion Status • Due Date • Enrolled Content
View Cancel Enrollment Reason Categories Security: *Set Up: Learning Catalog* domain in the Learning Core functional area.	Displays reasons for canceled enrollments in learning course offerings. Use the Maintain Cancel Enrollment Reason Categories task to create and maintain the reason categories that display in this report.

Related Information

Reference

The Next Level: Peer Learning

The Next Level: Learning Transformed

Example: Create a Custom Report for Learning Assignment Completions

This example illustrates how to create a custom report for learning assignment completions, enabling you to manage learning compliance from a single place.

Context

You want to report on all learning assignments for a specific organization within the company.

Steps

1. Access the Create Custom Report task.

   As you complete the task, consider:

Option	Description
Report Name	Enter *All Assignment Records*.
Report Type	Select *Advanced*.
Data Source	Select *Learning Assignments by Learning Organization*.

2. On the Edit Custom Report task, as you complete the Columns tab, add these rows:

Business Object	Field
Learning Assignments by Learning Organization	Worker
Learning Assignments by Learning Organization	Learning Content
Learning Assignments by Learning Organization	Assignment Mechanism

Business Object	Field
Learning Assignments by Learning Organization	Assigned Date
Learning Assignments by Learning Organization	Assigned By
Learning Assignments by Learning Organization	Assignment Status
Learning Assignments by Learning Organization	Required
Learning Assignments by Learning Organization	Due Date
Learning Assignments by Learning Organization	Assignment Record Completion Moment
Learning Assignments by Learning Organization	Assignment Cancellation Date
Learning Record	Record Expiration Date
Learning Assignments by Learning Organization	Job Profile
Learning Assignments by Learning Organization	Job Title
Learning Assignments by Learning Organization	Worker's Manager(s)

3. On the Sort tab, add these rows:

Field	Sort Direction
Worker	*Alphabetical - Ascending*
Learning Content	*Alphabetical - Ascending*

4. To save the report, click OK.

Next Steps

Run the custom report to check on the assignment status of learners in a specific supervisory organization.

Example: Create a Custom Report for Learner Attendance

This example illustrates 1 way to create a custom report to manage learner attendance for course offerings.

Context

As a learning administrator, you want to identify which course offerings require recording learner attendance. You create a custom report to record enrolled content and learners, their in-progress lessons, and attendance statuses.

Prerequisites

Security: *Custom Report Creation* domain in the System functional area.

Steps

1. Access the Create Calculated Field task.

   Create a calculated field for lesson tracking to use in your custom report.

   a. Enter *Lesson Tracking Calculated Field* for the Field Name.
   b. Select *Learning Enrollment* for the Business Object.
   c. Select *Extract Multi-Instance* for the Function.
   d. Click OK.
   e. Select *Subset* for the Operation Type.
   f. Select *Lesson Tracking* for the Source Field.
   g. Select *Any is True* for the Condition.
   h. Click OK.
   i. Click Done.
2. Access the Create Custom Report task.
3. Enter these values:

Option	Description
Report Type	Select *Advanced*.
Data Source	Select *Learning Enrollments*.
Data Source Filter	Select *All Enrolled Enrollments*

4. On the Columns tab, add these fields:

Business Object	Field
Learning Enrollment	Enrolled Content
Learning Enrollment	Worker
Lesson Tracking	Lesson Title
Lesson Tracking	Lesson Type
Lesson Tracking	Attendance Status
Lesson Tracking	Lesson Grade

5. On the Filter on Instances grid on the Filter tab, add these rows:

And/Or	Field	Operator	Comparison Type	Comparison Value
And	*Learning Content Type*	*in the selection list*	*Value specified in this filter*	*Course Offering*
And	*Lesson Tracking Calculated Field*	*is not empty*		
And	*Completion Status*	*in the selection list*	*Value specified in this filter*	*In Progress* *Not Started*
And	*Learning Content Title*	*contains*	*Prompt the user for the value and ignore the filter condition if the value is blank*	*Default Prompt*

6. On the Subfilter tab, select Add.
7. Select *Lesson Tracking Calculated Field* for the Business Object.

8. Add these rows and values:

And/Or	Field	Operator	Comparison Type	Comparison Value
And	*Lesson Type*	*in the selection list*	*Value specified in this filter*	*In Person Classroom (Instructor Led)* *Virtual Classroom (Instructor Led)* *Training Activity*
And	*Lesson Attendance Status*	*in the selection list*	*Value specified in this filter*	*Not Entered*

9. Click OK.
10. Click Run.

Related Information
Tasks
Create Calculated Fields
Create Custom Reports

Example: Define Custom Email Notifications for Learning Enrollments

Context

This example illustrates how to define an email notification to the initiator of a learning enrollment. The notification uses report field values on the *Learning Enrollment Event* business object. Your company wants Workday to send an email to the initiator of a learning enrollment once the enrollment is complete.

Steps

1. Select Business Process > Add Notification from the related actions menu of the Enroll in Content (Default Definition) business process.
2. Click OK.
3. Configure these values:

Field	Value
Trigger on Status	*Completed*
Recipient(s)	*Initiator of Enrollment*
Email Option	*Default*

4. In the Message Content section, compose the Subject. Workday automatically adds spacing after each Text and External field value.

   Add rows for these items in this order:

Field	Value
Text	*Your request to attend*
External Field	*Course Name*
Text	*has been approved!*

5. Compose the Body.

   Add rows for these items in this order:

Field	Value
Text	*Hi*
Field	*Initiator of Enrollment*
Text	*,* *Your request to attend*
Field	*Course Name*
Text	*in*
Field	*Locations*
Text	*with*
Field	*Instructors*
Text	*has been approved! The cost of the course is:*
Field	*Course Cost*
Text	*Looking forward to seeing you at training.* *Warm regards* *The GMS Learning team*

6. Click OK.
7. Click Done.

Result

To check the format of the email notification before Workday sends it, click Preview.

Example: Define an Approval Condition Rule for Learning Enrollments

Context

This example illustrates how to define an entry condition rule for an approval step on the *Enroll in Content* business process. The rule uses report field values on the *Learning Enrollment Event* business object. Your company wants to enable learners to enroll in a course offering without approval from their managers when the location of the offering is the Dublin office.

Steps

1. Select Business Process > Edit Definition from the related actions menu of the Enroll in Content (Default Definition) business process.
2. Click OK.
3. In the Business Process Steps grid, add a step with these values and click OK:

Order	Type	Group
b	*Approval*	*Manager*

4. In the Step column of the Approval step row, select Business Process > Create Condition Rule from the related actions menu.
5. Enter a Description for the condition rule.

6. In the Rule Conditions grid, add 2 rules with these values and click OK:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Locations*	*none in the selection list*	*Value specified in this filter*	*Dublin*
And	*Course Type*	*any in the selection list*	*Value specified in this filter*	*Course Offering*

7. Click Rule Usage.
8. Click Enroll in Content (Default Definition) step b - Approval.
9. Click Enroll in Content (Default Definition).
10. In the Step column of the Approval step, select Business Process > Maintain Step Conditions from the related actions menu.
11. Click OK.
12. In the Entry Conditions grid, add a new row.
13. From the Rule prompt, select Condition Rules for Business Process Condition and select the condition rule that you just defined.
14. Click OK.
15. Click Done.

Troubleshooting: Learning Notifications Sending Incorrectly

Workday sends emails to learners who enroll in a program, not when they enroll in individual courses.

Cause: Your configuration sends notifications for enrollment in a program, even when a learner enrolls in an individual course of that program.

Solution: Create a condition rule to include notifications when a learner enrolls in all course types.

Steps

Security: *Set Up: Learning Catalog* domain in the Learning Core functional area.

1. Select Business Process > Create Condition Rule from the related actions menu of the Enroll in Content (Default Definition) business process.
2. In the Rule Conditions grid, name your condition rule and add these values:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Course Type*	*any in the selection list*	*Value specified in this filter*	*Blended Course, Course Offering, Digital Course, Imported Content, Lesson*

3. Select Business Process > Add Notification from the related actions menu of the Enroll in Content (Default Definition) business process.
4. Configure these values:

Field	Value
Trigger on Status	*Completed*

Field	Value
Recipient(s)	*Learner*
Email Option	*Default*

5. In the Message Content section, compose the Subject. Workday automatically adds spacing after each Text and External field value.
6. Compose the Body.
7. Add the condition rule to the notification.

Related Information
Concepts
Setup Considerations: Learning Enrollments on page 2075

Extended Enterprise Learning

Setup Considerations: Extended Enterprise Learning

You can use this topic to help make decisions when planning your configuration and use of Extended Enterprise Learning. 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

With Extended Enterprise Learning, you can provide learning content to users outside of your company, such as vendors, contractors, and partners, without modifying your security configurations. Extended enterprise learners can access your learning catalog and take courses.

Business Benefits

With Extended Enterprise Learning, you can:

- Save time and resources by using the same reporting, content, and learning management system for internal and external users.
- Provide knowledge sharing, compliance training, and certifications to nonemployees who do business with you, while maintaining your security configurations and data privacy.
- Strategically price learning content according to contracts with your third-party affiliates. Review the setup considerations for pricing enablement for details.

Use Cases

- Training vendors who need to review human resources policies before teaching courses to your employees.
- Manufacturing subcontractors who need to complete safety and compliance training.
- Seasonal workers in retail who need to learn about store systems and processes.
- Traveling nurses in healthcare who need to learn hospital-specific policies.

Questions to Consider

Questions	Considerations
How are extended enterprise learners different from contract contingent workers?	Contract contingent workers can access Workday and are part of your internal workforce. They typically receive some kind of benefit from you, such as onboarding, benefits, payroll, performance reviews, or time tracking. Extended enterprise learners are external to your company and can only access Workday Learning.
Who uses Extended Enterprise Learning?	Extended Enterprise Learning enables you to provide learning content to users outside of your company. Each member of your extended workforce has an external learning user account, which is their unified system account. The external learning user can have multiple active personas at the same time: • Extended enterprise learners can consume learning content. • External learning assessors can assess training activity lesson content for course offerings. • External learning instructors can teach courses or lessons. You can grant workers or members of your extended workforce additional responsibilities to help you manage your extended workforce: • Affiliation managers can manage an organization of extended enterprise learners. Affiliation managers are a role-based constrained group with access to their organization only. • Extended enterprise administrators are responsible for creating and maintaining extended enterprise learner accounts. Administrators have unconstrained access to administer learning to your extended workforce.
Do you need an Extended Enterprise Learning subscription to create external learning instructors and external learning assessors?	No, you don't need an Extended Enterprise Learning (EEL) subscription to create external learning instructors or external learning assessors. Creating profiles for external instructors and assessors is a core feature of Workday Learning and is available to all Workday Learning customers, regardless of whether you have an EEL subscription. The EEL subscription is specifically required for external learners to consume learning content in Workday Learning. The scope of the EEL subscription is focused on external end-users, not

Questions	Considerations
	on other external personas such as instructors or assessors.
How can you restrict the learning content that extended enterprise learners can view?	You can create learning topics and topic security segments to restrict content. You can use these report fields on the Learning Content Subscription business object to report on the dates through which extended enterprise learners should have access to learning content: • Inactive • Learning Content Subscriber • Learning Content Subscription Record • Learning Topic • Subscription Expiration Date
How can you track additional information about extended enterprise learners for compliance or reporting reasons when there's no Workday-delivered field?	You can create custom fields to track information such as partial training completion or the time it took to complete training. You can create custom fields on the Extended Enterprise Learner and Extended Enterprise Affiliation business objects. You can't use the *Manage Extended Enterprise Learner* business process to edit custom objects. You can edit custom fields: • By accessing the related actions menu on an extended enterprise learner or an affiliation. • Through web services using the Workday REST API. You can also create EIBs for non-effective dated custom objects.
How do you want to configure sign-in for external learning users?	External learning users can sign in to Workday on mobile or desktop. When your workers use Single Sign-On (SSO), but you don't intend to set up SSO for external learning users, you can configure an authentication selector. This enables external learning users to sign into Workday using a username and password. You can configure multifactor authentication for external learning users for more secure access.
Can extended enterprise learners receive campaigns?	You can create campaigns for extended enterprise learners using the Extended Enterprise Campaign. This is different from the Learning Campaign used for employees. Extended Enterprise Campaigns enable separate security and campaign configuration for extended enterprise learners. Workday doesn't enable you to send surveys to extended enterprise learners with campaigns.

Questions	Considerations
How can extended enterprise learners modify certifications on other extended enterprise learners' profiles?	To enable an extended enterprise learner to modify certifications for other extended enterprise learners, make them the affiliation manager for the intended extended enterprise learners' affiliation. To enable an extended enterprise learner to modify certifications for all extended enterprise learners, make them the affiliation manager for all of your existing affiliations, instead of granting them administrator permissions. Assign the extended enterprise learner constrained access to the *Person Data: Certifications* domain and the *Manage Certifications* business process in the Worker Profile and Skills functional area. When you grant an extended enterprise learner unconstrained access to the *Manage Certifications* business process, they can view and modify certifications on worker profiles.
How can your extended enterprise learners become workers in your organization?	Extended enterprise learners can view and apply for jobs for nonworkers within your organization through their Workday account. When you hire an extended enterprise learner, their learning transcripts and talent certifications transition with them to their new role. Workday archives their external learning user account and personas and clears their extended enterprise learner activation date. Set up Workday Recruiting to use this feature.
How do you determine the time zone for extended enterprise learner activation dates?	Workday uses these time zone rules: The activation date time zone is based on the preferred time zone on the external learning user account. Otherwise, Workday uses the first available of these time zones in this order: • The override extended enterprise affiliation location for the extended enterprise learner when the location is configured with a time zone. • The extended enterprise affiliation location for the extended enterprise learner when the location is configured with a time zone. • Your tenant time zone. • Pacific Standard Time. Workday determines the expiration date time zone based on the processing user's time zone, so you may notice different expiration and activation date time zones for extended enterprise learners. When you want Workday to determine time zones for activation dates based on your affiliation locations, ensure that:

Questions	Considerations
	• You configure time zones for your locations. Example: Add Business Site as a Location Usage on an Extended Enterprise Affiliation location. • External learning user accounts don't have preferred time zones.
How can extended enterprise learners create their own accounts?	Set up the Managed Self-Registration feature to enable prospective extended enterprise learners to register for their own accounts. Account approvals are based on your configuration of the *Request Extended Enterprise Learner* business process.
How can you deactivate multiple extended enterprise learner accounts at once?	Workday enables you to use a mass operation to deactivate up to 50,000 extended enterprise learners accounts at once. The mass operation deactivates accounts based on criteria specified in a custom report.

Recommendations

No impact.

Requirements

Set up Workday Learning.

To create external learning users, configure the *View External Learning User* domain and the *Manage External Learning User* business process and security policy.

Limitations

- External learning instructors and external learning assessors can’t create their own accounts as a self-service option.
- You can't merge person records for external learning users who become workers using the duplicate management framework.
- You can't configure and send different email templates for new accounts for external learning users and workers. Workday sends the same email to both person types. The email content is customizable.
- Workday doesn't support constrained access to the *Manage Certifications* business process for external learning instructors who are also administrators.
- Extended enterprise learners with future-hire dates are sometime unable to access their Worker profile.
- Tasks on the the *Request Extended Enterprise Learner* business process don't include the Activation Date field, so you can't schedule a future activation date. When you create a new or activate an existing extended enterprise learner using this business process, Workday automatically sets the activation date to the date that the request was initiated. To determine the time zone, Workday uses the activation date time zone rules. When you edit an extended enterprise learner, Workday retains their existing activation date.

Tenant Setup

Use the Edit Tenant Setup - HCM task to configure these tenant-wide options for your external workforce:

Option	Description
Enable Self-Service Time Zone Management for Extended Enterprise check box	Select to enable learners to set their own time zone for course enrollment expiration rules.
Enable Pricing Configuration for Person Types prompt	Select person types that you want to configure pricing for, including extended enterprise learners.

Security

In the Extended Enterprise for Learning or Learning Core functional areas:

Domains	Considerations
Learning Access	Enables extended enterprise learners access to search the learning catalog and view course information.
Maintain Archived External Learning User	Enables users to unarchive external learning users who aren't active workers.
Manage: Extended Enterprise	Enables extended enterprise learning administrators to manage affiliations, job profiles, and dashboard access.
Manage: Extended Enterprise Affiliation Learners	Enables affiliation managers to view extended enterprise learners in their affiliation.
Manage: Extended Enterprise Learner Type	Enables users to create and manage extended enterprise learner types. Users with View access on the *Manage: Extended Enterprise* domain can view the learner type you assign to an extended enterprise learner.
Manage: Learning Content	Enables users to access administrative tasks and reports to manage learning content, including creating course expiration rules.
Self-Service: On the Job Training	Enables external learning assessors to access the Learning Trainer worklet and manage grading and attendance for course offerings.
Manage: Self-Registration	Enables administrators to create and manage self-registration URLs.
Person Data: Learning	Enables administrators to view learning transcripts for extended enterprise learners, including on user profiles.
Reports: Archived External Learning Users	Enables users to report on archived external learning users.
Reports: Extended Enterprise Affiliations	Enables constrained and unconstrained security groups to access reports related to extended enterprise affiliations.
Reports: Extended Enterprise Affiliation Learners	Enables affiliation managers to access reports on learners in their affiliation.
Reports: Extended Enterprise Usage Metrics	Enables users to track the number of active extended enterprise learners in your tenant. You

Domains	Considerations
	can use this information to measure your product usage over time.
Self-Service: Extended Enterprise Learning	Enables extended enterprise learners to view their own profile and information.
Self Service: Learning	Grants users self-service capabilities, such as viewing transcript details on their profile.
Self-Service: Learning Assessor	Enables external learning assessors to view their own profile.
View External Learning User	Enables administrators to view external learning user information, including external learning user profiles.

In other functional areas:

Domains	Considerations
Internal Careers in the Recruiting functional area.	Enables extended enterprise learners to view and apply for jobs for nonworkers within your organization through their existing Workday account.
Mass Operation Management in the System functional area.	Enables users to manage mass operations, including setting up and running the *Deactivate Extended Enterprise Learner Accounts* mass operation type.
Person Data: Certifications in the Worker Profile and Skills functional area.	Enables administrators to view certifications for extended enterprise learners and external learning instructors, including on user profiles.
Person Data: Personal Photo in the Personal Data functional area.	Enables users to view and edit photos for users that they have access to.
Self-Service: Certifications in the Worker Profile and Skills functional area.	Enables users to view their own certifications on their profile.
Self-Service: My Applications in the Recruiting functional area.	Enables extended enterprise learners to review or withdraw their applications.
Self-Service: Personal Photo in the Personal Data functional area.	Enables users to view and edit their own photo.

Business Processes

Business Processes	Considerations
Request Extended Enterprise Learner	Enables affiliation managers to request learning access for new or existing users for their affiliations. Workday recommends first configuring these business processes, which are subprocesses on the *Request Extended Enterprise Learner* business process: • *Manage External Learning User*

Business Processes	Considerations
	• *Manage Extended Enterprise Learner* Managed Self-Registration uses the *Request Extended Enterprise Learner* business process to create new or editing existing users. Ensure that you have allowed actions, security groups, and approvals properly configured before distributing self-registration URLs.
Mass Enroll	To enable affiliation managers to enroll extended enterprise learners that belong in their assigned affiliations in learning courses, grant them permission on the initiating action.
Manage External Learning Assessor	Enables you to create and edit external learning assessors.
Manage External Learning User	Enables you to create external learning user accounts. To enable external learning users to edit their own personal information, grant them permissions on the Edit My Personal Information initiating action.
Manage Extended Enterprise Learner	Enables you to create and edit extended enterprise learners.
Manage External Learning Instructor	Enables you to create and edit external learning instructors.
Enroll in Content, *Drop Learning Enrollment*, and *Mass Enroll*	You can enable extended enterprise learners to enroll, and external learning instructors and affiliation managers to enroll and approve enrollments.
Manage Certifications	To enable extended enterprise learners, external learning instructors, and administrators to open certification attachments, you must grant them View Completed Events permissions on this business process.
Job Application	To enable extended enterprise learners to view and apply for jobs for nonworkers within your organization, grant them permission on the Apply to Job for Non-Workers initiating action.

Reporting

Reports or Dashboards	Considerations
Extended Enterprise Admin dashboard	Enables extended enterprise administrators to manage extended enterprise learners and affiliations.
Find Extended Enterprise Learners report	Enables affiliation managers and administrators to search for active extended enterprise learners.

Reports or Dashboards	Considerations
Learning dashboard	Modify this dashboard so extended enterprise learners can easily access announcements and learning content.
Daily Maximum Count of Active Extended Enterprise Learners Monthly Maximum Count of Active Extended Enterprise Learners Yearly Maximum Count of Active Extended Enterprise Learners	View and monitor the number of extended enterprise learners in your tenant. When you retroactively enter an expiration date for an extended enterprise learner using the Edit Extended Enterprise Learner task, the reports reflect the account as inactive as of the day you enter the expiration date. These reports only display current data in Production environments: • Monthly Maximum Count of Active Extended Enterprise Learners • Yearly Maximum Count of Active Extended Enterprise Learners
View Extended Enterprise Affiliation report	View details on an extended enterprise affiliation.
View Extended Enterprise Learner report	View an extended enterprise learner's profile.
View External Learning User report	View an external learning user's profile.

You can create custom reports with these report data sources:

- Indexed Learning Campaign Records
- Extended Enterprise Affiliations
- Extended Enterprise Job Profiles
- Extended Enterprise Learners
- External Learning Users
- Learning Assignments by Learning Organization
- Learning Assignment Records
- Learning Enrollments
- Learning Instructors

To display first and last names in separate columns on custom reports, use report fields on the Global Person Names business object instead of the Extended Enterprise Learner business object.

Integrations

Web Services	Consideration
Maintain Archived External Learning User	Use to manage external learning user archiving in your organization. For EIBs based on the *Maintain Archived External Learning User* web service, Workday recommends that you create these condition rules: • Is Archived on the External Learning User business object is true. • Is Active Worker on the External Learning User business object is false.

Web Services	Consideration
Manage Extended Enterprise Learner	Use to create extended enterprise learners from existing external learning users. You can optionally disable the username and password notifications Workday sends to learners upon account creation. When you want to update existing inactive extended enterprise learners, Workday recommends that you disable username and password emails. For EIBs based on the *Manage Extended Enterprise Learner* web service, Workday recommends that you: • Select Extended Enterprise Learner ID for Reference ID Type for Condition Rule. • Use this rule condition, Is Archived on the Extended Enterprise Persona business object is false. You can use this web service to set extended enterprise learner activation dates that are in the past. When you specify all the same values as an existing extended enterprise learner in your request, the web service doesn't create any new business process events. It also doesn't send username and temporary password emails, even when you specify sending these emails.
Manage External Learning Assessor	Use to create external learning assessors. You can optionally disable the username and password notifications Workday sends to assessors upon account creation.

Manage External Learning Instructor	Use to create external learning instructors.
	
	You can optionally disable the username and password notifications Workday sends to external instructors upon account creation.
	
	For EIBs based on the *Manage External Learning Instructor* web service, Workday recommends that you:
	
	• Select External Learning Instructor ID for Reference ID Type for Condition Rule, and
	• Use 1 of these rule conditions:
	  ◦ Is Archived on the Extended Enterprise Persona business object is false.
	  ◦ Is Archived on the External Learning Instructor business object is false.

Manage External Learning User	Use to create external learning user accounts.

Web Services	Consideration
	For EIBs based on the *Manage External Learning User* web service, Workday recommends that you create this condition rule: Is Archived on the External Learning User business object is false.

Connections and Touchpoints

Extended Enterprise Learning interacts with Workday Recruiting. You can enable extended enterprise learners to view and apply for jobs for nonworkers within your organization. When you hire an extended enterprise learner, their learning transcripts and talent certifications transition with them into their new role and Workday archives their external learning user account and personas.

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: Learning on page 1871
Concept: Security in Learning on page 1916
Setup Considerations: Pricing on page 1927
Setup Considerations: Recruiting on page 175
Setup Considerations: Managed Self-Registration for Extended Enterprise on page 2139

Tasks

Steps: Set Up Certifications on page 131
Steps: Maintain Access to Learning Content on page 1914
Steps: Set Up Authentication Policies
Steps: Set Up Learning Instructors on page 1888
Steps: Set Up E-Commerce for Learning on page 1932

Reference

Custom Objects (Non-Effective Dated) EIB - Inbound

Steps: Set Up Extended Enterprise Learning

Prerequisites

- Review setup considerations for Extended Enterprise Learning.
- Set up Workday Learning. See Steps: Set Up Learning.

Context

You can set up Extended Enterprise Learning to enable users outside of your organization to access learning content in your tenant.

Steps

1. Configure security for external learning users and administrators.

   See Steps: Set Up Access for Extended Enterprise Learning on page 2122.
2. Create affiliations to assign to extended enterprise learners.

   See Steps: Set Up Extended Enterprise Affiliations on page 2123.

3. (Optional) Create Email Templates.

   Edit the contents of these email templates:

   - *Workday New Account Password*
   - *Workday New User Name Notification*

   Workday sends the same emails for new accounts for external learning users and workers.
4. Access the Maintain Extended Enterprise Learner Type task.

   Create learner types for users outside of your organization. Example: Customer or Partner.

   Security: *Manage: Extended Enterprise Learner Type* domain in the Extended Enterprise for Learning functional area.
5. Create External Learning Users on page 2127.
6. (Optional) Create Extended Enterprise Learners on page 2128.

   Add the extended enterprise learner persona to external learning user accounts.
7. (Optional) Add the external learning instructor persona to external learning user accounts.

   See Steps: Set Up Learning Instructors on page 1888.
8. (Optional) Add the external learning assessor persona to external learning user accounts.

   See Steps: Set Up Learning Assessors on page 1889.
9. Configure the Extended Enterprise Admin dashboard.

   You can also add the All Extended Enterprise Learners security group to the worklets on the Learning dashboard.

   To ensure that the Learning worklet displays by default for extended enterprise learners when they access Workday Learning, add the All Extended Enterprise Learners security group to the Learning worklet on the Home dashboard.

   See Steps: Set Up Dashboards and Landing Pages.
10. (Optional) Copy Reports.

    Create a custom report by copying the Find Extended Enterprise Learners report and adding a mass enroll action.

    On the Advanced tab, add a row to the Mass Actions grid and select *Learning Mass Enroll (Extended Enterprise)* from the Workday Supplied Mass Actions prompt.
11. (Optional) Set up Managed Self-Registration to enable prospective extended enterprise learners to register for their own accounts.

    See Steps: Set Up Managed Self-Registration for Extended Enterprise.

Next Steps

Create learning campaigns to recommend content to extended enterprise learners.

Configure the Extended Enterprise Profile using these tasks:

- Configure Profile
- Configure Profile Group
- Configure Profile Header Card
- Configure Profile Summary

Related Information

Tasks

Steps: Set Up and Launch Learning Campaigns on page 1973

Steps: Set Up Profiles and Profile Groups

Steps: Set Up Profile Cards

Reference

The Next Level: Train the World with Workday Extended Enterprise for Learning

2022R2 What's New Post: Extended Enterprise Profile
2023R2 What's New Post: Activation Date for Extended Enterprise Learners
2024R1 What's New Post: Self-Service Profile Management for Extended Enterprise

Steps: Set Up Access for Extended Enterprise Learning

Context

You can create security groups within your organization to determine who can:

- Access learning content.
- Create and manage extended enterprise learners.

Steps

1. Access the Domain Security Policies for Functional Area report.
    a) On the Functional Area prompt, select *Extended Enterprise for Learning*.
    b) Select Domain Security Policy > Enable from the related actions menu on the security policy for these domains:
        - *Manage: Extended Enterprise*
        - *Self-Service: Extended Enterprise Learning*
2. Create User-Based Security Groups.

    Create user-based security groups for managing external learning users.
3. Edit Domain Security Policies.

    Configure access for the:

    - All Extended Enterprise Learners security group on the *Learning Access* domain in the Learning Core functional area.
    - User-based security groups that you created on the *Manage: Extended Enterprise* domain in the Extended Enterprise for Learning functional area.

    Configure access for the Extended Enterprise Learner as Self security group on these domains:

    - *Person Data: Personal Photo* and *Self-Service: Personal Photo* in the Personal Data functional area.
    - *Self-Service: Certifications* in the Worker Profile and Skills functional area.
    - *Self-Service: Extended Enterprise Learning* in the Extended Enterprise for Learning functional area.
    - *Self Service: Learning* in the Learning Core functional area.
4. Edit Business Process Security Policies.

    Assign extended enterprise security groups to perform actions on these business processes in the Learning Core functional area:

    - *Drop Learning Enrollment*
    - *Enroll in Content*
    - *Manage Lesson*

    (Optional) Add the External Learning User as Self security group to the Edit My Personal Information initiating action on the *Manage External Learning User* business process.
5. Activate Pending Security Policy Changes.
6. (Optional) Configure segmented security for extended enterprise learners.

    See ../learning-setup-and-maintenance/learning-security/czj1470841147315.dita.

7. Access the Edit Tenant Setup - Security task.

   Select the Email Temporary Password to New Accounts check box to ensure that new users receive security emails.

   Note: This is a tenant-wide setting that all applies to all new users, including new workers. In some cases, you can configure individual business processes to avoid sending temporary password emails to all new users. Example: Configure the *Hire* business process so that new workers don't get these emails.

   See Reference: Edit Tenant Setup - Security.

   Security: *Set Up: Tenant Setup - Security* domain in the System functional area.
8. (Optional) Set Up Authentication Selectors.

   When your workers use Single Sign-On (SSO), you can configure an authentication selector that enables external learning users to bypass SSO and sign in with a username and password.
9. (Optional) Set up multifactor authentication.

   As you configure the authentication policy, select:

   - *All External Learning Users* from the Security Group prompt on the Authentication Ruleset grid.
   - *One Time Passcode - Email* from the Multi-factor Authentication prompt on the same row.

   See Steps: Set Up Multifactor Authentication Using Emailed One-Time Passcode.

Next Steps

Configure security for extended enterprise affiliation roles.

Steps: Set Up Extended Enterprise Affiliations

Context

Extended enterprise affiliations are groups of extended enterprise learners. You can establish hierarchies by creating superior and subordinate affiliations. Workday enables you to assign users to roles that manage and report on specific affiliations.

When you create extended enterprise learners, add each one to the appropriate affiliation.

Steps

1. Create Locations.

   Select the Extended Enterprise Affiliation option from the Location Usages prompt to create locations for extended enterprise affiliations. Alternatively, you can edit an existing location. Access the Edit Location Usages task and select the Extended Enterprise Affiliation option from the Location Usages prompt.
2. Access the Create Extended Enterprise Affiliation task.

   As you create affiliations, you can specify their locations. You can also create hierarchical relationships by selecting superior affiliations.

   Security: *Manage: Extended Enterprise* domain in the Extended Enterprise for Learning functional area.
3. Set Up Assignable Roles.

   Create and enable a role for extended enterprise affiliations. Example: The Affiliation Manager role enabled for Extended Enterprise Affiliation.
4. Create Role-Based Security Groups.

   Create a constrained role-based security group for the role that you created.

5. Edit Domain Security Policies.

   Configure these domains and grant the role-based security group View or Modify permissions:

   - *Manage: Extended Enterprise Affiliation Learners* in the Extended Enterprise for Learning functional area. Enables users to create, edit, and view extended enterprise learners within their assigned affiliations.
   - (Optional) *Person Data: Certifications* in the Worker Profile and Skills functional area. Enables access to certification information.
   - (Optional) *Person Data: Learning* in the Learning Core functional area. Enables access to learner transcripts.
   - *Reports: Extended Enterprise Affiliation Learners* in the Extended Enterprise for Learning functional area. Enables users to view extended enterprise learners that belong to their assigned affiliations.
   - (Optional) *Reports: Extended Enterprise Affiliations* in the Extended Enterprise for Learning functional area. Enables constrained and unconstrained groups to access reports related to affiliations.
   - (Optional) *Workday Accounts* in the System functional area. Enables users with Modify permission to reset passwords for extended enterprise learners in their affiliations.
6. (Optional) Edit Business Processes.

   Configure the *Mass Enroll* business process in the Learning Core functional area to enable users to enroll extended enterprise learners that belong in their assigned affiliations in learning courses.
7. (Optional) Edit Business Process Security Policies.

   Grant the role-based security group permissions on the initiating action of the *Mass Enroll* business process.
8. (Optional) Configure the *Request Extended Enterprise Learner* business process in the Extended Enterprise for Learning functional area.

   Enables affiliation managers to request learning access for new or existing users for their affiliations. You can configure the business process to initiate automatically or manually, or use a combination of automatic and manual initiation based on custom condition rules.

   See:

   - Steps: Configure Automatic Initiation of Request Extended Enterprise Learner on page 2134
   - Steps: Configure Manual Initiation of Request Extended Enterprise Learner on page 2135
   - Steps: Configure Conditional Initiation of Request Extended Enterprise Learner on page 2137
9. From the related actions menu of an extended enterprise affiliation, select Roles > Assign Roles.

   Assign roles to affiliations.

Next Steps

Create external learning users.

Related Information

Concepts

Concept: Extended Enterprise Affiliations on page 2130

Steps: Set Up Internal Hiring and Transcript Transition for Extended Enterprise Learners

Prerequisites

Set up internal recruiting. See Steps: Set Up Internal Recruiting.

Context

You can enable extended enterprise learners to use their existing Workday account to view and apply for jobs for nonworkers within your organization.

When you hire an extended enterprise learner for a job in your organization:

- Their learning transcripts and talent certifications transition with them to their new role.
- Workday automatically archives their external learning user account and personas on the hire date.

This makes it easier to transition between external and internal workforces while maintaining records under 1 account.

Steps

1. Configure the *Job Application* business process in the Recruiting functional area.

   See Steps: Configure the Job Application Business Process on page 197.
2. Edit Business Process Security Policies.

   On the *Job Application* business process, add the Extended Enterprise Learner as Self security group to the Apply to Job for Non-Workers initiating action.
3. Edit Domain Security Policies.

   Grant the:

   - All Extended Enterprise Learners security group Modify permissions on the *Internal Careers* domain in the Recruiting functional area.
   - (Optional) Extended Enterprise Learner as Self security group Modify permissions on the *Self-Service: My Applications* domain under the *Internal Careers* parent domain in the Recruiting functional area. Enables extended enterprise learners to review or withdraw their applications.
   - (Optional) Recruiter (Unconstrained) security group View permissions on the *View External Learning User* domain in the Extended Enterprise for Learning functional area. Enables recruiters to view contact information for extended enterprise learners.

Result

Extended enterprise learners can view available jobs on the Find Jobs (Non-Workers) report.

Related Information
Reference
2022R1 What's New Post: Transcript Transition for Extended Enterprise Learners

Steps: Set Up Mass Extended Enterprise Learner Account Deactivation

Prerequisites

Security: *Mass Operation Management* domain in the System functional area.

Context

You can use a mass operation to deactivate up to 50,000 extended enterprise learners accounts at once based on criteria specified in a custom report.

Workday excludes extended enterprise learner accounts from this operation when they're archived, already inactive, or have in progress events on these business processes:

- *Manage Extended Enterprise Learner*
- *Request Extended Enterprise Learner*

Steps

1. Create a Segment-Based Security Group for Mass Operations.

   You can create a new security group or edit an existing security group and enable members to set up mass extended enterprise learner account deactivation.

   As you complete the task, consider:

Option	Description
Security Groups	Select the security groups that you want to enable to run the *Deactivate Extended Enterprise Learner Accounts* mass operation type.
Access to Segments	Select the *Deactivate Extended Enterprise Learner Accounts* segment.

2. Edit Domain Security Policies.

   Grant the new segment-based security group Modify permissions on the *Mass Operation Management* domain.
3. Activate Pending Security Policy Changes.
4. Create Custom Reports.

   Create a custom report based on the Extended Enterprise Learners report data source that defines the criteria for deactivating extended enterprise learner accounts. Example: Your organization no longer does business with GMS, so you want to deactivate extended enterprise learners in the GMS affiliation. You create a custom report that displays extended enterprise learners in the GMS affiliation.

   Alternatively, you can copy the View Last Sign-In For Extended Enterprise Learners report, which displays extended enterprise learners that haven't signed in a specified number of days.

   As you complete the task, consider:

Option	Description
Report Type	Select *Simple* or *Advanced*.
Temporary Report	The report can't be temporary. Don't select this check box.
Data Source	Select the Extended Enterprise Learners report data source. You can only use a custom report based on this report data source in the *Deactivate Extended Enterprise Learner Accounts* mass operation type.
Report Definition Sharing Options	Share the report with appropriate authorized groups or users.

5. Access the Mass Operation Management task.

   As you complete the task, consider:

Option	Description
Mass Operation Type	Select the *Deactivate Extended Enterprise Learner Accounts* mass operation type. Workday only displays this option when the user is a member of the segmented security

Option	Description
	group with access the *Deactivate Extended Enterprise Learner Accounts* segment.
Input Report	Select the custom report that you created. This mass operation type only accepts custom reports.
Run Frequency	Configure the operation to run now, in the future, or on a regular schedule.
Enable Review	Workday only enables you to add user-based security groups.
Value Type and Value	When your custom report is based on the View Last Sign-In For Extended Enterprise Learners report, Workday displays the Number of Days Since Last Sign-In field in the Report Definition section. Use the Value Type and Value prompts to specify the number of days since last sign-in as criteria for mass deactivating extended enterprise learner accounts.

Result

When the mass operation runs, Workday deactivates extended enterprise learner accounts based on the criteria that you defined in your custom report.

For every extended enterprise learner account deactivation through the mass operation, Workday creates a new event on the Manage Extended Enterprise Learner Events report field. Workday automatically approves the event creation.

Related Information

Tasks

Set Up Mass Operations

Reference

2024R1 What's New Post: Criteria-Based Automated Account Deactivation for Extended Enterprise

Create External Learning Users

Prerequisites

Security: Configure the *Manage External Learning User* business process and security policy in the Extended Enterprise for Learning functional area.

Context

You can create external learning user accounts for learners and instructors outside of your organization. The external learning user account is the unified system account that holds the user's basic information.

Steps

1. Access the Create External Learning User task.

2. As you complete the task, consider:

Option	Description
Email Address	Workday sends sign-in credentials to this email address when you activate a persona on the external learning user account. You can't reuse email addresses that already exist in your tenant, including proposed email addresses for in-progress *Manage External Learning User* business process events and email addresses for terminated workers.
Preferred Time Zone	Select the time zone for Workday to use for course enrollment expiration rules and activation date for the external learning user. Workday uses Pacific Standard Time when you don't specify a time zone. To enable time zone preferences for users, select the Enable Self-Service Time Zone Management for Extended Enterprise check box on the Edit Tenant Setup - HCM task.
Preferred Locale and Preferred Display Language	Workday uses the default tenant locale and language when you don't specify these settings.

Result

Workday assigns external learning users to the External Learning User as Self and All External Learning Users security groups. External learning user accounts are disabled until you activate personas on them.

Next Steps

Add Extended Enterprise personas to external learning user accounts.

Related Information

Tasks

Steps: Set Up Learning Instructors on page 1888

Steps: Set Up Learning Assessors on page 1889

Reference

2021R2 What's New Post: Unified System Account for External Learning Personas

2021R2 What's New Post: Preferred Language and Locale Settings for External Learning Users

Create Extended Enterprise Learners

Prerequisites

- Create external learning user accounts.
- Configure the *Manage Extended Enterprise Learner* business process and security policy in the Extended Enterprise for Learning functional area.
- Security: Configure these domains in the Extended Enterprise for Learning functional area:
    - *Manage: Extended Enterprise*
    - *Manage: Extended Enterprise Affiliation Learners*

Context

You can create extended enterprise learners by activating the extended enterprise learner persona for any external learning user. Extended enterprise learners can access your learning catalog and take courses through their Workday account. They can consume learning content based on training, compliance, and knowledge sharing needs.

Steps

1. Access the Create Extended Enterprise Learner task.
2. As you complete the task, consider:

Option	Description
Persona Status	You can select Inactive to create an inactive extended enterprise learner or you can select Schedule to enter activation and expiration dates. Workday automatically sets the activation date to the current date. You can change it to a date in the future. Workday sends the extended enterprise learner their welcome emails on the activation date. The activation date time zone is based on the preferred time zone on the external learning user account. Otherwise, Workday uses the first available of these time zones in this order: • The override extended enterprise affiliation location for the extended enterprise learner when the location is configured with a time zone. • The extended enterprise affiliation location for the extended enterprise learner when the location is configured with a time zone. • Your tenant time zone. • Pacific Standard Time. You can set an expiration time and date to terminate all active Workday sessions for this account on all devices. Workday determines the expiration date time zone based on the processing user's time zone, so you may notice different expiration and activation date time zones for extended enterprise learners.
Extended Enterprise Affiliation	The extended enterprise learner inherits their account location from their affiliation.
Override Extended Enterprise Affiliation Location	Select this check box to assign a location for the extended enterprise learner that is different from the location of their affiliation. You must have View permissions on the *Locations: View* domain to use this check box.

Result

Workday sends the extended enterprise learner emails with their username and temporary password on their activation date, which they can use to access Workday Learning. Workday assigns the extended enterprise learner to the All Extended Enterprise Learners and Extended Enterprise Learner as Self security groups and appends *E* to the end of their name.

You can search for active extended enterprise learners by name using the eel prefix in global search.

Next Steps

Add certifications to extended enterprise learners' profiles.

Create campaign audiences.

Related Information

Tasks

Steps: Set Up Certifications on page 131

Reference

2021R2 What's New Post: Certifications for External Learning Users

2023R2 What's New Post: Activation Date for Extended Enterprise Learners

Concept: Extended Enterprise Affiliations

Extended enterprise affiliations enable you to group extended enterprise learners. You can group them based on categories such as vendor, department, or geographic location. Extended enterprise affiliations are similar to supervisory organizations. Workday requires you to set up extended enterprise affiliations and assign each extended enterprise learner to an affiliation. You can create hierarchies using superior and subordinate affiliations. Workday enables you to report on affiliations.

You're a learning administrator at Global Modern Services (GMS), a company that manufactures power tools. AMS Hardware and Tool Supply sell GMS' power tools at their hardware stores across Canada and the US. The workers at the hardware stores have extended enterprise learning accounts, enabling them to access product-knowledge and safety courses.

To organize the extended enterprise learners, you create an affiliation for each retailer in each country:

- AMS Hardware - Canada
- AMS Hardware - USA
- Tool Supply - Canada
- Tool Supply - USA

You then create subordinate affiliations that group extended enterprise learners by store location within each country. You add extended enterprise learners to the affiliation for the store where they work.

Affiliation Locations

You can optionally specify locations for affiliations. When an affiliation has a location, all extended enterprise learners within the affiliation inherit the location. You can select the Override Extended Enterprise Affiliation Location check box on an extended enterprise learner's profile to stop them from inheriting the location. When you select this option, Workday requires that you enter a location for the extended enterprise learner.

When you want Workday to determine time zones for activation dates based on your affiliation locations, ensure that:

- You configure time zones for your locations. Example: Add Business Site as a Location Usage on an Extended Enterprise Affiliation location.
- External learning user accounts don't have preferred time zones.

Affiliation Managers

You can assign workers or members of your extended workforce to be affiliation managers. They manage and report on specific organizations of extended enterprise learners and can manage details like their certifications and learning enrollments. Workday recommends that you set up affiliation managers as a role-based constrained group, ensuring that they can only access their own affiliations.

To enable affiliation managers to reset passwords for extended enterprise learners in their affiliations, provide the Affiliation Manager – Constrained role-based security group Modify access on the *Workday Accounts* domain. They can select Security Profile > Manage Workday Account Credentials from the related actions menu of an extended enterprise learner to reset their password.

Affiliation managers can request new or edit existing extended enterprise learners for their affiliations using the *Request Extended Enterprise Learner* business process.

Affiliations Management

You can manage affiliations by:

- Inactivating affiliations you're not currently using.
- Deleting affiliations you've never used.

From the related actions menu of an affiliation, select Inactivate or Delete. When you inactivate affiliations, begin with subordinate affiliations at the bottom of the hierarchy, working towards the top. When you reactivate affiliations, begin at the top of the hierarchy, working towards the bottom.

Related Information
Tasks
Steps: Set Up Extended Enterprise Affiliations on page 2123

Reference: Extended Enterprise Learning Feature Availability

Extended Enterprise Learning enables you to create Workday accounts for users outside of your company so they can access your learning catalog and take courses.

This table lists different features and their availability or limitations for extended enterprise learning. Extended enterprise learners:

Feature	Availability	Limitation
Activity Stream	Can comment on courses and view comments from workers or other extended enterprise learners.	Can't be tagged in comments and can't tag others in comments.
Certifications	Can access on their profile.	
Competencies	Can filter search results by competency when browsing for learning content.	Can't earn competencies.
Course Calendar	Can view the Learner Schedule Calendar when they have access to the *Self Service: Learning* domain.	
Course Contacts	Can view contact information when they click a contact person or instructor on a course or course offering.	Can't view worker profiles.

Feature	Availability	Limitation
Custom Organizations		Can't be in custom organizations.
Learning Transcripts	Can access on their profile or from the My Transcript report on the Learning dashboard.	
My Team's Peer Learning Content		Aren't included in the report.
Opportunity Graph		Can't view.
Photo	Can change their own photo.	
Unique ID		Don't have Employee IDs.
Mobile	Can access Extended Enterprise on mobile.	

Related Information
Reference
The Next Level: Peer Learning
2022R2 What's New Post: Extended Enterprise Profile
2024R1 What's New Post: Self-Service Profile Management for Extended Enterprise

Example: Assign Multiple Personas to External Learning Users

This example illustrates how to activate multiple personas on a single external learning user account. A person can have multiple personas in your organization at the same time, while maintaining 1 Workday account and 1 set of sign-in credentials.

Context

You're a learning administrator at Global Modern Services (GMS), a company that manufactures electric vehicles. You want to give subcontractor Erin Park access to compliance training. Erin is also a subject matter expert on the batteries that GMS uses in their new line of electric vehicles. You want her to teach an 8-month-long course on battery installation.

When Erin completes the compliance training, she no longer requires access to learning content. Erin needs to remain an external learning instructor for the duration of the battery installation course.

You need to:

- Create an external learning user account for Erin.
- Activate the extended enterprise learner persona on the account.
- Activate the external learning instructor persona on the account and set an expiration date of 8 months from now.
- Inactivate the extended enterprise learner persona on the account when Erin completes the compliance training.

Prerequisites

- Set up Extended Enterprise Learning.

Steps

1. Access the Create External Learning User task.

2. Enter these values in the Account Information section:

Field	Values
User Name	*erinpark*
Email Address	*erin.park@atp.ca*

3. Enter these values in the Personal Information section:

Field	Values
Country	*Canada*
First Name	*Erin*
Last Name	*Park*
Preferred Time Zone	*GMT-06:00 Central Standard Time (Regina)*
Preferred Locale	*English (Canada) - en_CA*
Preferred Display Language	*English*

4. Click Submit.
5. Access the Create Extended Enterprise Learner task.
6. Select *Erin Park* from the External Learning User prompt.
7. Click OK.
8. Set the Persona Status to *Active*.
9. Select an affiliation from the Extended Enterprise Affiliation prompt.
10. Click Submit.

    Workday sends Erin notification emails with a username and temporary password.
11. Access the Create External Learning Instructor task.
12. Select *Erin Park* from the External Learning User prompt.
13. Click OK.
14. In the Persona Status section, set an expiration date for 8 months from now.
15. Click Submit.

    Erin can use her existing credentials to sign in as the external learning instructor until the persona status expires.
16. When Erin completes the compliance training, access the Edit Extended Enterprise Learner task.
17. Select *Erin Park* from the Extended Enterprise Learner prompt.
18. Click OK.
19. Change the Persona Status to *Inactive*.
20. Click Submit.

Result

When the external learning instructor persona expires, Workday disables Erin's external learning user account. The disabled account continues to exist in Workday and you can enable it again by activating a persona on the account.

Related Information

Tasks

Steps: Set Up Learning Instructors on page 1888

Reference

2021R2 What’s New Post: Unified System Account for External Learning Personas

Request Extended Enterprise Learner Business Process

Steps: Configure Automatic Initiation of Request Extended Enterprise Learner

Prerequisites

Configure these business processes and security policies in the Extended Enterprise for Learning functional area:

- *Manage Extended Enterprise Learner*
- *Manage External Learning User*

Context

You can enable affiliation managers to request learning access for new or existing users by configuring the *Request Extended Enterprise Learner* business process. The business process uses these business processes as subprocesses for creating new or editing existing users:

- *Manage External Learning User*
- *Manage Extended Enterprise Learner*

You can configure the *Request Extended Enterprise Learner* business process so that when the initiator requests an existing user, Workday automatically initiates the request and overrides the existing user information with the requested information.

You can apply different configuration options to the different steps on the *Request Extended Enterprise Learner* business process.

Note: When you create the default definition for the *Request Extended Enterprise Learner* business process, the definition that Workday populates isn't usable. Reconfigure it to avoid inconsistent data results.

Steps

1. Access the Create Business Process Definition (Default Definition) task.

   Create the default definition for the *Request Extended Enterprise Learner* business process in the Extended Enterprise for Learning functional area.

   a) Delete the *Create External Learning User from Request* and *Edit Extended Enterprise Learner from Request* steps.

   b) Reorder the steps in the definition.

      Ensure that:

      - The *Create External Learning User from Request (Auto-Initiate)* step comes before the *Edit External Learning User from Request* step.
      - All steps involving external learning users come before any steps involving extended enterprise learners.
      - The *Create Extended Enterprise Learner from Request* step comes before the *Edit Extended Enterprise Learner from Request (Auto-Initiate)* step.

      Example:

      - *Create External Learning User from Request (Auto-Initiate)*
      - *Edit External Learning User from Request*
      - *Create Extended Enterprise Learner from Request*
      - *Edit Extended Enterprise Learner from Request (Auto-Initiate)*

   Security: These domains in the System functional area:

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

2. Edit Business Process Security Policies.

   Configure the security policy for the *Request Extended Enterprise Learner* business process.

Result

Affiliation managers with permissions on the *Request Extended Enterprise Learner* business process can access these tasks to request learning access for new or existing users:

- Request Edit Extended Enterprise Learner
- Request Extended Enterprise Learner

Related Information

Reference

2022R2 What's New Post: Request Extended Enterprise Learner for Existing Accounts

Steps: Configure Manual Initiation of Request Extended Enterprise Learner

Prerequisites

Configure these business processes and security policies in the Extended Enterprise for Learning functional area:

- *Manage Extended Enterprise Learner*
- *Manage External Learning User*

Context

You can enable affiliation managers to request learning access for new or existing users by configuring the *Request Extended Enterprise Learner* business process. The business process uses these business processes as subprocesses for creating new or editing existing users:

- *Manage External Learning User*
- *Manage Extended Enterprise Learner*

You can configure the *Request Extended Enterprise Learner* business process so that when the initiator requests an existing user, Workday sends security group members on the subprocesses a task enabling them to compare the requested and existing user information and either deny or submit the request. When they submit the request, Workday overrides the existing user information with the requested information. Only 1 person from the security group needs to complete the task.

You can apply different configuration options to the different steps on the *Request Extended Enterprise Learner* business process.

Note: When you create the default definition for the *Request Extended Enterprise Learner* business process, the definition that Workday populates isn't usable. Reconfigure it to avoid inconsistent data results.

Steps

1. Edit Business Process Security Policies.

   Add appropriate security groups to the:

   - *Create External Learning User from Request* initiating action on the *Manage External Learning User* business process.
   - *Edit Extended Enterprise Learner from Request* initiating action on the *Manage Extended Enterprise Learner* business process.

   Workday recommends that you add unconstrained security groups. This ensures that when Workday sends security group members the task to deny or submit a request, they can view all requested and existing user information. Example: Extended Enterprise Admin or External Learning User Admin.

   Add these security groups when you create the default definition for the *Request Extended Enterprise Learner* business process.
2. Activate Pending Security Policy Changes.
3. Access the Create Business Process Definition (Default Definition) task.

   Create the default definition for the *Request Extended Enterprise Learner* business process in the Extended Enterprise for Learning functional area.

   a) On the *Create External Learning User from Request* step, select the same security group as on the *Create External Learning User from Request* action on the *Manage External Learning User* business process.
   b) On the *Edit Extended Enterprise Learner from Request* step, select the same security group as on the *Edit Extended Enterprise Learner from Request* action on the *Manage Extended Enterprise Learner* business process.
   c) Delete the *Create External Learning User from Request (Auto-Initiate)* and *Edit Extended Enterprise Learner from Request (Auto-Initiate)* steps.
   d) Reorder the steps in the definition.

      Ensure that:

      - The *Create External Learning User from Request* step comes before the *Edit External Learning User from Request* step.
      - All steps involving external learning users come before any steps involving extended enterprise learners.
      - The *Create Extended Enterprise Learner from Request* step comes before the *Edit Extended Enterprise Learner from Request* step.

      Example:

      - *Create External Learning User from Request*
      - *Edit External Learning User from Request*
      - *Create Extended Enterprise Learner from Request*
      - *Edit Extended Enterprise Learner from Request*

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
4. Edit Business Process Security Policies.

   Configure the security policy for the *Request Extended Enterprise Learner* business process.

Result

Affiliation managers with permissions on the *Request Extended Enterprise Learner* business process can access these tasks to request learning access for new or existing users:

- Request Edit Extended Enterprise Learner

- Request Extended Enterprise Learner

Related Information
Reference
2022R2 What's New Post: Request Extended Enterprise Learner for Existing Accounts

Steps: Configure Conditional Initiation of Request Extended Enterprise Learner

Prerequisites

Configure these business processes and security policies in the Extended Enterprise for Learning functional area:

- *Manage Extended Enterprise Learner*
- *Manage External Learning User*

Context

You can enable affiliation managers to request learning access for new or existing users by configuring the *Request Extended Enterprise Learner* business process. The business process uses these business processes as subprocesses for creating new or editing existing users:

- *Manage External Learning User*
- *Manage Extended Enterprise Learner*

You can configure the *Request Extended Enterprise Learner* business process so that when the initiator requests an existing user, Workday follows 1 of these workflows, depending on your custom condition rules:

- Sends security group members on the subprocesses a task enabling them to compare the requested and existing user information and either deny or submit the request. When they submit the request, Workday overrides the existing user information with the requested information. Only 1 person from the security group needs to complete the task.
- Automatically initiates the request and overrides the existing user information with the requested information.

You can apply different configuration options to the different steps on the *Request Extended Enterprise Learner* business process.

Note: When you create the default definition for the *Request Extended Enterprise Learner* business process, the definition that Workday populates isn't usable. Reconfigure it to avoid inconsistent data results.

Steps

1. Edit Business Process Security Policies.

   Add appropriate security groups to the:

   - *Create External Learning User from Request* initiating action on the *Manage External Learning User* business process.
   - *Edit Extended Enterprise Learner From Request* initiating action on the *Manage Extended Enterprise Learner* business process.

   Workday recommends that you add unconstrained security groups. This ensures that when Workday sends security group members the task to deny or submit a request, they can view all requested and existing user information. Example: Extended Enterprise Admin or External Learning User Admin.

   Add these security groups when you create the default definition for the *Request Extended Enterprise Learner* business process.
2. Activate Pending Security Policy Changes.

3. Access the Create Business Process Definition (Default Definition) task.

   Create the default definition for the *Request Extended Enterprise Learner* business process in the Extended Enterprise for Learning functional area.

   a) On the *Create External Learning User from Request* step, select the same security group as on the *Create External Learning User from Request* action on the *Manage External Learning User* business process.
   b) On the *Edit Extended Enterprise Learner from Request* step, select the same security group that you selected for the *Edit Extended Enterprise Learner from Request* action on the *Manage Extended Enterprise Learner* business process.
   c) Reorder the steps in the definition.

      Ensure that:

      - The steps to create external learning users come before the step to edit external learning users.
      - All steps involving external learning users come before any steps involving extended enterprise learners.
      - The step to create extended enterprise learners comes before the steps to edit extended enterprise learners.

      Example:

      - *Create External Learning User from Request (Auto-Initiate)*
      - *Create External Learning User from Request*
      - *Edit External Learning User from Request*
      - *Create Extended Enterprise Learner from Request*
      - *Edit Extended Enterprise Learner from Request (Auto-Initiate)*
      - *Edit Extended Enterprise Learner from Request*

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
4. Access the *Request Extended Enterprise Learner* business process definition.

   From the related actions menu of the appropriate step, select Business Process > Create Condition Rule.

   a) Create mutually exclusive condition rules that determine if Workday executes the *Create External Learning User from Request (Auto-Initiate)* step or the *Create External Learning User from Request* step.
   b) Create mutually exclusive condition rules that determine if Workday executes the *Edit Extended Enterprise Learner from Request (Auto-Initiate)* step or the *Edit Extended Enterprise Learner from Request* step.

Result

Affiliation managers with permissions on the *Request Extended Enterprise Learner* business process can access these tasks to request learning access for new or existing users:

- Request Edit Extended Enterprise Learner
- Request Extended Enterprise Learner

Example

This example illustrates how to add condition rules to the *Request Extended Enterprise Learner* business process definition that ensure that when the initiating affiliation manager is:

- A worker, Workday automatically initiates requests for existing users.

- External to your organization, Workday sends the security groups on the *Manage External Learning User* and *Manage Extended Enterprise Learner* subprocesses a task for requests for existing users, prompting them to submit or deny the request.

1. Access the *Request Extended Enterprise Learner* business process definition.
2. From the related actions menu of the *Create External Learning User from Request (Auto-Initiate)* step, select Business Process > Create Condition Rule. Create a condition rule with these values:

Field	Value
Description	*Initiating Worker is Not Empty*
And/Or	*And*
Source External Field or Condition Rule	*Initiating Worker*
Relational Operator	*is not empty*
Comparison Type	*Value specified in this filter*

3. Add the *Initiating Worker is Not Empty* condition rule to these steps:
   - *Create External Learning User from Request (Auto-Initiate)*
   - *Edit Extended Enterprise Learner from Request (Auto-Initiate)*
4. From the related actions menu of the *Create External Learning User from Request* step, select Business Process > Create Condition Rule. Create a condition rule with these values:

Field	Value
Description	*Initiating Worker is Empty*
And/Or	*And*
Source External Field or Condition Rule	*Initiating Worker*
Relational Operator	*is empty*
Comparison Type	*Value specified in this filter*

5. Add the *Initiating Worker is Empty* condition rule to these steps:
   - *Create External Learning User from Request*
   - *Edit Extended Enterprise Learner from Request*

Related Information

Concepts

Concept: Step Conditions

Reference

2022R2 What's New Post: Request Extended Enterprise Learner for Existing Accounts

Managed Self-Registration

Setup Considerations: Managed Self-Registration for Extended Enterprise

You can use this topic to help make decisions when planning your configuration and use of Managed Self-Registration for Extended Enterprise. 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

Managed Self-Registration for Extended Enterprise enables people outside of your organization to register for their own extended enterprise learning account.

You can create affiliation-specific self-registration URLs and distribute them to prospective extended enterprise learners so that they register for an account. After account approval, they can sign in to Workday Learning as extended enterprise learners. Workday automatically adds them to the affiliation associated with the URL.

Business Benefits

With Managed Self-Registration, organizations can:

- Save time and resources by enabling prospective extended enterprise learners to register for their own accounts.
- Streamline a portion of the onboarding process for extended enterprise learners.

Use Cases

Onboarding large volumes of extended enterprise learners from third party contractors or vendors.

Questions to Consider

Questions	Considerations
How do you restrict who can register for an account?	Anyone who accesses your self-registration URL can register for an account. To restrict registrations, configure the *Request Extended Enterprise Learner* business process with an administrator approval step so that administrators can approve or deny new account registrations. To avoid charges for added extended enterprise learning accounts, Workday recommends that you restrict registration.
Can you restrict the number of users who can self-register?	Workday automatically limits the number of self-registrations per hour based on the number of extended enterprise learners in your tenant. Workday enables up to 500 self-registrations per hour when you have 5999 or fewer active or inactive extended enterprise learners. The hourly limit increases by 100 self-registrations per hour for every additional 1000 extended enterprise learners. The maximum hourly limit is 1000 self-registrations. Example: • 0-5999 extended enterprise learners = 500 self-registrations per hour • 6000-6999 extended enterprise learners = 600 self-registrations per hour • 7000-7999 extended enterprise learners = 700 self-registrations per hour

Questions	Considerations
	You can enter a custom hourly limit in the Edit Tenant Setup - HCM task. Note: For security, Workday recommends using the default value or entering a custom limit that's less than the default value.
How can you manage self-registration URLs?	You can create 1 self-registration URL per extended enterprise affiliation. You can inactivate URLs or schedule activation and expiration dates. You can view and report on inactive self-registration URLs in Workday.
Can external learning instructors register for their own accounts?	Only extended enterprise learners can self-register. However, you can activate the external learning instructor persona on external learning users created through self-registration.
What will the activation date be for extended enterprise learners created through self-registration?	Workday sets the activation date to the date that the extended enterprise learner submitted their account registration. Workday uses your tenant time zone for the activation date time zone. When you don't have a tenant time zone, Workday uses Pacific Standard Time.
What happens when there are duplicate self-registrations?	If a prospective extended enterprise learner has a pending self-registration and they attempt to submit another self-registration, Workday displays an error that tells the them to contact their administrator. If an existing extended enterprise learner submits a self-registration and you have the *Request Extended Enterprise Learner* business process configured to enable administrators to review duplicate requests, administrators receive a task enabling them to compare the requested and existing user information and either deny or submit the request. When they submit the request, Workday overrides the existing user information with the requested information.
How do you configure the language and name format for the self-registration page that extended enterprise learners see when they access a self-registration URL?	Workday translates the self-registration page into a Workday-supported language based on the user's browser language. Upon account approval, the extended enterprise learner receives their username and temporary password emails in the same language. They also select a country when they register, which determines the formatting for their name.

Recommendations

To avoid unknown users creating accounts, Workday recommends adding administrator approval steps to the *Request Extended Enterprise Learner* business process. Workday also recommends using the default value or less for the hourly limit on self-registrations.

Requirements

Configure the *Manage: Self-Registration* domain and set up the *Request Extended Enterprise Learner* business process. See:

- Steps: Configure Automatic Initiation of Request Extended Enterprise Learner
- Steps: Configure Conditional Initiation of Request Extended Enterprise Learner
- Steps: Configure Manual Initiation of Request Extended Enterprise Learner

Limitations

- When an existing user registers for an account, Workday doesn't notify them that the email that they registered with is already in use. To avoid this, Workday recommends only distributing the self-registration URL to new users.
- Managed Self-Registration only supports First Name and Primary name components. It doesn't support additional required name components that you configure.

Tenant Setup

You can optionally use the Edit Tenant Setup - HCM task to:

- Configure the privacy policy for prospect extended enterprise learners who are registering for an account. The privacy policy is set to None by default.
- View or customize your hourly limit on self-registrations.

Security

In the Extended Enterprise for Learning functional area:

Domains	Considerations
Manage: Self-Registration	Enables users to create, edit, view, and report on self-registration URLs.

Business Processes

Business Processes	Considerations
Request Extended Enterprise Learner	Managed Self-Registration uses the *Request Extended Enterprise Learner* business process to create new or edit existing extended enterprise learners. Configure this business process before distributing self-registration URLs.

Reporting

You can create custom reports using these report data sources:

- Extended Enterprise Learners
- External Learning Users
- Self-Registration URLs

Integrations

Web Services	Considerations
Get Self Registration URLs	Use this web service to retrieve self-registration URLs.
Put Self Registration URL	Use this web service to create or update self-registration URLs.

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.

Related Information

Concepts

Setup Considerations: Extended Enterprise Learning on page 2110

Examples

2023R2 What's New Post: Managed Self-Registration

2022R2 What's New Post: Request Extended Enterprise Learner for Existing Accounts

The Next Level: Managed Self-Registration for Extended Enterprise

Steps: Set Up Managed Self-Registration for Extended Enterprise

Context

Managed Self-Registration for Extended Enterprise enables people outside of your organization to register for their own extended enterprise learning account. You can create self-registration URLs to distribute to prospective extended enterprise learners. Each URL is unique to an extended enterprise affiliation. You can create 1 URL per affiliation. When prospect extended enterprise learners access the URL, they enter their information to register for an account.

After account approval, the new extended enterprise learner receives 2 emails with their username and temporary password, enabling them to sign in to Workday Learning. Their username is the same as their email address. Workday automatically adds the extended enterprise learner to the affiliation associated with the self-registration URL that they used to register.

Steps

1. Configure the *Request Extended Enterprise Learner* business process in the Extended Enterprise for Learning functional area.

   Note: Managed Self-Registration uses the *Request Extended Enterprise Learner* business process to create new or editing existing users. Ensure that you have allowed actions, security groups, and approvals properly configured before distributing self-registration URLs.

   You can configure the business process to initiate automatically or manually, or use a combination of automatic and manual initiation based on custom condition rules.

   To avoid unknown users creating accounts and accessing your learning content, Workday recommends adding administrator approval steps to the *Request Extended Enterprise Learner* business process.

   These topics describe 3 different approaches for configuring the *Request Extended Enterprise Learner* business process. See:

   - Steps: Configure Automatic Initiation of Request Extended Enterprise Learner.
   - Steps: Configure Conditional Initiation of Request Extended Enterprise Learner.
   - Steps: Configure Manual Initiation of Request Extended Enterprise Learner.

2. Access the Domain Security Policies for Functional Area report.

   Select Domain Security Policy > Enable from the related actions menu of the *Manage: Self-Registration* domain in the Extended Enterprise for Learning functional area.

   Security: These domains in the System functional area:

   - *Security Activation*
   - *Security Configuration*
3. Edit Domain Security Policies.

   Set up the security policy for the *Manage: Self-Registration* domain.

   When you want to enable affiliation managers to create and manage self-registration URLs, Workday recommends that you add the Affiliation Manager – Constrained security group to the domain security policy. This ensures that affiliation managers can only view the self-registration URL associated with their own affiliation.
4. (Optional) Access the Learning: Extended Enterprise section of the Edit Tenant Setup - HCM task.
   a) Select a self-registration privacy policy option. The default is None.
   b) Select the Override Default Self-Registration Hourly Limit With Custom Value check box to enter a custom limit on the number of self-registrations per hour.

      Workday determines your default hourly limit on the number of self-registrations based on the number of extended enterprise learners in your tenant. Workday enables up to 500 self-registrations per hour when you have 5999 or fewer active or inactive extended enterprise learners. The hourly limit increases by 100 self-registrations per hour for every additional 1000 extended enterprise learners. The maximum hourly limit is 1000 self-registrations.

      Example:

      - 0-5999 extended enterprise learners = 500 self-registrations per hour
      - 6000-6999 extended enterprise learners = 600 self-registrations per hour
      - 7000-7999 extended enterprise learners = 700 self-registrations per hour

      Note: For security, Workday recommends using the default value or entering a custom limit that's less than the default value.

      When registrations exceed the hourly limit, anyone additional who registers for an account within that hour receives an error informing them that their request couldn't be submitted.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

Result

Users with permission can create self-registration URLs for affiliations.

Next Steps

Create a self-registration URL using the Create Self-Registration URL task and distribute it to prospect extended enterprise learners.

Example: Create a Self-Registration URL

This example illustrates how to create a self-registration URL. It describes how to configure it so that only a specific group can successfully register for extended enterprise accounts.

Context

You're a learning administrator at Global Modern Services (GMS), a company that manufactures electric vehicles. You hire 16 subcontractors from ATP. They need to register for extended enterprise learning accounts so that they can take required compliance training. Your training materials contain proprietary information, so you want to ensure that only the 16 subcontractors successfully register and access the materials.

You work with an administrator at ATP as your primary contact while you onboard the new subcontractors.

Prerequisites

Set Up Managed Self-Registration for Extended Enterprise.

Steps

1. Access the *Request Extended Enterprise Learner* business process definition.

   Add an approval step to the business process definition with a security group that includes administrators. This routes all requests for new extended enterprise learners to an administrator who can approve or deny each request and ensure that only the 16 subcontractors successfully register for accounts.

   a) From the related actions menu of the *Request Extended Enterprise Learner* business process definition, select Business Process > Edit Definition.
   b) Click OK.
   c) Add a row.
   d) Enter or select these values:

Field/Prompt	Value
Order	A value that ensures that this step is last in the definition. Example: *z*
Type	*Approval*
Group	An unconstrained group that includes administrators. Example: *Extended Enterprise Admin*

   e) Click OK and Done.

   Security: These domains in the System functional area:

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

2. Access the *Request Extended Enterprise Learner* business process definition.

   Add a condition rule to the approval step so that it only triggers when a request for a new extended enterprise learner comes from a self-registration URL. The condition rule enables you to maintain your regular business process configuration while ensuring that administrators have full control over who can create an account through a self-registration URL.

   a) From the related actions menu of the approval step, select Business Process > Create Condition Rule.
   b) Create a condition rule with these values:

Field	Value
Description	*Request from Self-Registration*
And/Or	*And*
Source External Field or Condition Rule	*Created from Self-Registration*
Relational Operator	*equal to*
Comparison Type	*Value specified in this filter*

Field	Value
Comparison Value	Select the Comparison Value checkbox.

c) Click OK.
d) From the related actions menu of the approval step, select Business Process > Maintain Step Conditions.
e) Click OK.
f) From the Rule prompt, select the *Request from Self-Registration* condition rule.
g) Click OK and Done.

3. Access the Create Extended Enterprise Affiliation task.

   Create a new affiliation for ATP.

   a) In the Name field, enter *ATP*.
   b) Click OK and Done.
4. Access the Create Self-Registration URL task.

   Create an active self-registration URL for the ATP affiliation.

   a) Enter or select these values:

Field	Value
Extended Enterprise Affiliation	*ATP*
Activation Date	Current date and time. Example: *02/21/2023, 09:00 AM*

   b) Click OK and Done.
5. Distribute the self-registration URL.

   Email the self-registration URL to the ATP administrator so that they can forward it to the 16 prospective extended enterprise learners from ATP.

Result

The subcontractors can access the self-registration URL and register their own account details. The approval step and condition rule ensure that the extended enterprise administrator approves or denies each request. Upon approval, the new extended enterprise learners each receive 2 emails with their username and temporary password, enabling them to access Workday Learning. Workday automatically adds them to the ATP affiliation.

Workday Scheduling

Centralized Scheduling

Mass Generate Schedules for Organizations

Prerequisites

Security: *Set Up: Centralized Scheduling* domain in the Workday Scheduling functional area.

Context

You can use the Mass Generate Schedules for Organizations task to launch a background job that mass generates schedules.

Steps

1. Access the Mass Generate Schedules for Organizations task.
2. Select a run frequency.
3. Click OK.
4. Complete the schedule generation details:

Option	Description
Scheduling Organizations	Workday generates schedules for all scheduling organizations that: • You select. • Are subordinate to the high-level scheduling organizations that you select.
Number of Weeks	Determines how many weeks to generate schedules for. Enter a value from 1 to 8.
Start Date	Workday uses the Start Date in the Schedule Generation Details section or tab to determine the first schedule week for these frequencies: • *Run Now* • *Run Once in the Future*
Days in the Future	Workday uses the value you enter in the Days in the Future field and the day you configure on the Schedule tab to determine the first schedule week for these frequencies: • *Weekly Recurrence* • *Monthly Recurrence*

5. (Optional) Complete the Schedule tab:

Option	Description
Priority	Setting a higher priority can reduce potential queuing. See Concept: Workday Scheduled Processes.
Recurs Every x Week(s)	Available when you select *Weekly Recurrence* for Run Frequency. Enter a number from 1 to 52.
Days(s) of the Week	Available when you select *Weekly Recurrence* for Run Frequency. You can select more than 1 day. Example: You want to generate schedules for 2 scheduling organizations, North and South, on the day of the week their schedules start. If the North schedule starts on Monday and South starts on Tuesday, select both *Monday* and *Tuesday*.
Recurrence Type	Available when you select *Monthly Recurrence* for Run Frequency. Specify which Days(s) of the Month or Day of the Week to run the job based on a calendar date.

Option	Description
Catch Up Behavior	Workday uses this field to determine whether to run the job again after an error.
Start Date	Select the date when you want the job to begin.
End Date	For weekly or monthly recurrence, select the date when you want the job to end.

6. Click OK and Done.

Result

Workday creates a schedule in *Draft* status.

Example

You want to generate schedules every Sunday beginning on a week 28 days in the future. Configure these options:

Option	Value
Run Frequency	*Weekly Recurrence*
Days in the Future	*28*
Days(s) of the Week	*Sunday*

Next Steps

You can access the Process Monitor report to view a summary of the schedules that were completed and any errors.

Mass Publish Schedules for Organizations

Prerequisites

Security: *Set Up: Centralized Scheduling* domain in the Workday Scheduling functional area.

Context

You can use the Mass Publish Schedules for Organizations task to launch a background job that mass publishes schedules that are in *Draft* status.

Steps

1. Access the Mass Publish Schedules for Organizations task.
2. Select a run frequency.
3. Click OK.
4. Complete the organization schedule settings:

Option	Description
Scheduling Organizations	Workday publishes schedules for all scheduling organizations that: • You select.

Option	Description
	• Are subordinate to the high-level scheduling organizations that you select.
Number of Weeks	Determines how many weeks to publish a schedule for. Enter a value from 1 to 8.
Start Date	For the Run Now or Run Once in the Future frequencies, Workday uses the Start Date to determine the week to publish a schedule.
Days in the Future	For the weekly or monthly frequencies, Workday uses the value you enter in the Days in the Future field and the day you configure on the Schedule tab to calculate when to publish the first schedule.

5. (Optional) Complete the Schedule tab:

Option	Description
Priority	Setting a higher priority can reduce potential queuing. See Concept: Workday Scheduled Processes.
Recurs Every x Week(s)	Available when you select *Weekly Recurrence* for Run Frequency. Enter a number from 1 to 52.
Days(s) of the Week	Available when you select *Weekly Recurrence* for Run Frequency. You can select more than 1 day. Example: You want to publish schedules for 2 scheduling organizations, East and West, on the day of the week their schedules start. If the East schedule starts on Sunday and West starts on Monday, select both *Sunday* and *Monday*.
Recurrence Type	Available when you select *Monthly Recurrence* for Run Frequency. Specify which Days(s) of the Month or Day of the Week to run the job based on a calendar date.
Catch Up Behavior	Workday uses this field to determine whether to run the job again after an error.
Start Date	Select the date when you want the job to begin.
End Date	For weekly or monthly recurrence, select the date when you want the job to end.

6. Click OK and Done.

Example

You want to publish schedules the first Monday of the scheduling month beginning on a month 60 days in the future. Configure these options:

Option	Value
Run Frequency	*Monthly Recurrence*
Days in the Future	*60*
Day of the Week	*First Monday*

Next Steps

You can access the Process Monitor report to view a summary of the schedules that were published and any errors.

Mass Clear Schedules for Organizations

Prerequisites

Security: *Set Up: Centralized Scheduling* domain in the Workday Scheduling functional area.

Context

You can use the Mass Clear Schedules for Organizations task to launch a background job that mass clears schedules.

Steps

1. Access the Mass Clear Schedules for Organizations task.
2. Click OK.
3. Complete the task:

Option	Description
Scheduling Organizations	Workday clears schedules for all scheduling organizations that: • You select. • Are subordinate to the high-level scheduling organizations that you select.
Number of Weeks	Determines how many weeks to generate schedules for. Enter a value from 1 to 8.
Start Date	Determines the first schedule week to clear.

Next Steps

You can access the Process Monitor report to view a summary of the schedules that were cleared and any errors.

Concept: Mass Generate Schedules for Organizations

You can launch a background job to mass generate schedules. This enables you to generate many schedules at once while continuing to use your Workday tenant. Workday manages all centralized scheduling jobs to efficiently use computing power. This improves performance and supports scalability for larger or more complex organizations.

When you launch the job, Workday generates schedules in the background for all scheduling organizations that:

- You select.

- Are subordinate to the high-level scheduling organizations that you select.

Jobs can process for up to 12 hours. Workday generates schedules for all organizations successfully processed within this time. We don't generate schedules for any organizations or weeks that haven't been processed within the 12-hour limit.

Provisioning tenanted resources requires lead time, which varies with the complexity of your configuration and the necessary updates. Workday can help you adjust job configurations to meet processing constraints, eliminating the need for additional infrastructure. We recommend that you test your configuration in a Sandbox tenant to help us monitor behavior and address issues effectively.

For scheduling organizations that use manual scheduling, Workday generates blank schedules. Once the job is running, you can’t generate or modify schedules using the Schedule Workers report.

You can generate schedules for up to 8 weeks at a time. To generate schedules for more than 8 weeks, you can configure multiple future job runs. When you configure multiple weeks, Workday creates schedules independently and in sequential order for each scheduling organization you select.

Workday skips scheduling organizations that already have a schedule created.

Concept: Mass Publish Schedules for Organizations

You can launch a background job to mass publish schedules. This enables you to publish many schedules at once while continuing to use your Workday tenant. This makes it easier for centralized teams to publish schedules for many scheduling organizations at once. You can run the job across multiple high-level scheduling organizations and their subordinate scheduling organizations.

Workday publishes schedules in the background for all scheduling organizations that:

- You select.
- Are subordinate to the high-level scheduling organizations that you select.

This job initiates the *Publish Schedule* business process using the account that configured the job. When step conditions are configured on the *Publish Schedule* business process, Workday respects the conditions. Workday recommends that you do not use an Integration System User account to run the job because the ISU account permissions will skip step conditions on the business process.

When the job includes multiple weeks, Workday publishes the weeks in sequential order.

Concept: Mass Clear Schedules for Organizations

You can launch a background job to mass clear schedules while still using your Workday tenant. This makes it easier for centralized teams to clear schedules for many scheduling organizations at once.

Workday clears schedules in the background for all scheduling organizations that:

- You select.
- Are subordinate to the high-level scheduling organizations that you select.

When you configure multiple weeks, Workday clears schedules independently for each scheduling organization that you select. Workday skips schedules that are not in *Draft* status.

Scheduling Basics and Tenant Setup

Steps: Set Up Workday Scheduling and Labor Optimization

Context

The Workday Scheduling SKU enables you to create schedules that Workday validates against business rules, regulatory requirements, worker availability, preferences, and qualifications. With Workday Scheduling, workers are able to:

- Manage their own availability and schedule preferences to help balance work/life priorities..
- Receive notifications about their schedules.
- View schedules for themselves and their teams.
- Offer and request to cover shifts on the Open Shift Board.
- Swap shifts with coworkers to trade for shifts that better suit their personal needs.
- Sign up for additional shifts from their mobile devices.

With Workday Scheduling, managers can:

- Assign workers to customer-defined shifts based on business and worker needs.
- Measure productivity and labor costs and track scheduled vs. actuals.
- Ensure compliance with regulatory rules and business policies.

The Labor Optimization SKU is an add-on product to Workday Scheduling that uses artificial intelligence to optimize shifts and shift assignments. Labor Optimization matches labor demand with worker qualifications, availability, and preferences while respecting business and regulatory requirements. This SKU can meet the needs of businesses in industries with fluctuating labor demands like retail, hospitality, and food services.

With Labor Optimization, Workday generates the entire structure of the schedule, determining exactly how many shifts are required and exactly when those shifts should begin and end based on customer-provided labor demand while at the same time balancing shift assignments with worker availability, preferences, and skills to generate optimized schedules. Workday will also recommend replacement workers when shifts or schedules change. Labor Optimization enables managers to:

- Manage labor demand data by organization, suborganization, and work attributes or qualifications.
- Gain visibility into coverage gaps so that you can avoid overscheduling and overtime.
- Understand the quality of your schedule using a schedule score that rates how well the schedule meets worker and business needs.

Steps

1. Access the Maintain Functional Areas task.
    - Enable the Scheduling functional area.
    - (Optional) Enable the Labor Optimization functional area.
2. Configure domain security policies for Scheduling domains.

    Workday recommends providing both View and Modify access for the Scheduling Administrator and the Scheduling Partner.
3. (Optional) Configure domain security policies for Labor Optimization domains.
4. Configure business process security policies for Scheduling business processes.

    See: Reference: Scheduling Business Processes on page 2199.

    All business processes are secured to the Workday Scheduling . You don’t need Labor Optimization to use business processes.
5. Set up the organizations that you'll use to schedule workers.

    See: Steps: Set Up Scheduling Organizations on page 2153.
6. Define settings for high-level scheduling organizations such as the appearance of the schedule for managers and workers, and the options that are available for managers when they create schedules.

    See: Steps: Set Up High-Level Scheduling Organizations on page 2154.
7. Create validations to warn managers when they create or attempt to publish shifts that violate business or regulatory requirements.

    See: Steps: Create Schedule Validations on page 2168.
8. Create Schedule Tags on page 2205.

9. Assign schedule tags to workers based on their qualifications.

   See: Steps: Assign Schedule Tags on page 2203.
10. Create Scheduling Eligibility Rules on page 2171.
11. Define Working Hours on page 2163.
12. (Optional) Set up pattern-based schedules for workers whose work schedules don't change significantly from week-to-week.

    See: Steps: Set Up Static Scheduling on page 2166.

    Skip this step if you're using the Labor Optimization SKU.
13. (Optional) Set Up the Optimization Engine on page 2173.

    Skip this step if you're not using the Labor Optimization SKU.
14. (Optional) Add Labor Demand on page 2173.

    Skip this step if you're not using the Labor Optimization SKU.
15. Set up the Time and Scheduling Hub so managers have a centralized place to manage Workday Scheduling, Time Tracking, and Absence Management information.

    See: Steps: Set Up the Time and Scheduling Hub on page 2183.
16. (Optional) Configure and View Alerts.

    Alert workers of upcoming shifts using the Upcoming Shift notification type.
17. Set up notifications to send to workers when their shifts change.

    See: Steps: Set Up Shift Change Notifications on page 2187.

Result

Managers and schedulers can also access these tasks to define worker-level settings:

- Change Work Availability for Worker
- Change Schedule Preferences for Worker
- Override Scheduling Settings for Worker

Workers can access these tasks from the Scheduling worklet:

- My Schedule
- Change My Work Availability
- Change My Schedule Preferences
- Open Shift Board

Steps: Set Up Scheduling Organizations

Prerequisites

Security: *Set Up: Scheduling: Maintain Scheduling Organizations* domain in the Scheduling functional area.

Context

There are 3 types of organizations that you can use in Workday Scheduling: high-level scheduling organizations (HLSOs), scheduling organizations, and subgroup organizations. High-level scheduling organizations define settings for themselves and the scheduling organizations below them in the organization hierarchy. Scheduling organizations are the organizations that schedules are created for. An HLSO can also be a scheduling organization. Subgroup organizations are a smaller group of workers within a scheduling organization.

Steps

1. Access the Maintain Scheduling Organizations task.

   Define whether an organization is a high-level scheduling organization, a scheduling organization, or both.

   Example: You make the *Property Management - NA* supervisory organization an HLSO, but not a scheduling organization. You make 2 of its subordinate organizations, *Property Management - CAN* and *Property Management - USA* scheduling organizations. You define the schedule settings at the *Property Management - NA* level. The *Property Management - CAN* and *Property Management - USA* scheduling organizations inherit the settings from *Property Management - NA*. When Workday creates schedules, it will create schedules for *Property Management - CAN* and *Property Management - USA*.
2. (Optional) Set up subgroup organizations to create smaller groups of workers within a scheduling organization.

   See Step 2: Steps: Set Up High-Level Scheduling Organizations on page 2154.

Related Information

Concepts

Concept: Scheduling Organizations on page 2159

Tasks

Maintain Organization Types

Steps: Set Up High-Level Scheduling Organizations

Prerequisites

Security: *Set Up: Scheduling: Maintain Scheduling Organizations* domain in the Scheduling functional area.

Context

You can configure settings for high-level scheduling organizations (HLSOs) that determine many aspects of schedules including:

- The appearance of the schedule for managers and workers.
- The options that are available for managers when they create schedules.
- Schedule tags that can be assigned to workers and defined for labor demand.

Steps

1. Access the Edit Scheduling Settings task.

   Select an existing effective-dated configuration snapshot or create a new one. Workday prevents you from making changes that could potentially break an existing schedule or labor demand by locking certain fields on the configuration snapshot.

   The effective date for the configuration snapshot takes effect on the first day of the week. Example: You have your latest schedule generated from the week starting on Sunday, January 1, but then add a new snapshot starting Monday, January 2. The new snapshot won't have any fields locked as it doesn't take effect until the first day of the week (Sunday, January 8).
2. As you complete the Settings tab, consider:

Option	Description
Start Day of Week	Select the day on which each work week begins. If you use Workday Payroll or Time Tracking, Workday recommends that you use the same

Option	Description
	start day of week that you've configured in those product areas. Workday only applies schedule settings overrides if they're effective as of the first day of the scheduling week. Example: If your week starts on a Monday and you change someone's minimum and maximum weekly hours overrides as of Tuesday, those changes won't be effective until the next Monday.
Location	Select a location. The location you select must have a time zone configured. Workday applies the time zone of the location that you selected to the schedule. This time zone is the anchor time zone for the HLSO and all SOs beneath it. You can use locations as subgroup organizations to support different time zones within the same HLSO.
Demand Period Length	Select the interval of time for which you can define labor demand for schedules. Example: Your restaurant needs 3 servers from 6:30PM-7:00PM but 5 servers from 7:00PM-7:30PM. You select *30 minutes* for the Demand Period Length. For best performance, select an interval of 60 minutes.
Meal Break Rule Set	Select a meal break rule set that determines the number, length, order, and placement of meals and/or breaks in a shift. The Optimization Engine follows the rule set when generating schedules. It staggers breaks to minimize any overlapping. Example: You create a rule for an 8-hour shift. The rule requires 1 meal break for 45 minutes that must be at least 3 hours after the beginning of the shift, and at least 3 hours before the end of the shift.
Predictive Scheduling Rule Set	Select a predictive scheduling rule set to apply to the HLSO. You can configure a predictive scheduling rule set to calculate the penalty for changing a worker's schedule without advance notice, as required by some local and state laws.
Borrow Workers Rule Set	Select or create a new rule set to define the HLSOs that this HLSO can borrow workers from.

Option	Description
Include Leader as Part of the Schedule	Select to include the manager or scheduler in schedules when they sit outside of the organization.

Include Members Based On Organization	Specify the pool of workers that can be scheduled when generating a schedule.
	• With Scheduling Organizations
	    • Workday includes workers from subordinate organizations and every organization under them.
	• Without Scheduling Organizations
	    • Workday includes workers from subordinate organizations, and all of the organizational hierarchy under them, until a SO is encountered. If Workday encounters an SO, it ignores any workers within it, as well as those in the organizations under it.
	• Only Current Scheduling Organization
	    • Workday includes only workers from the current selected SO.
	Note: Borrowed workers are impacted. Organizations that are borrowed from a different HLSO use the HLSO configuration to determine the workers for which they can manually search. Adjacent organizations are not impacted. Example: HLSO 1 contains SO 1. HLSO 2 contains SO 2 and another organization under SO 2 called Org 1. Under Org 1 is SO 3. If the Without Scheduling Organizations setting is selected on HLSO 2, and if HLSO 1 is borrowing from HLSO 2, the manager is unable to manually search for workers from SO 3 because of the HLSO 2 configuration.

Enable Subgroup Organizations	Select to further divide this organization into subgroup organizations. This enables you to divide labor demand and labor cost in a more granular way.
Subgroup Organization Type	Select a location or custom organization that is enabled as a financial worktag (1-10). Access the Custom tab of the Maintain Organization Types task to edit or create organizations for use as a financial worktag.
Subgroup Organizations	Select subgroup organizations. Workday displays organizations that belong to the organization type you've selected.

Option	Description
	When you select organizations, Workday display them as additional subtabs on the Labor Demand tab of a schedule and in filtering options on the schedule.
Use Subgroup Organization Time Zone	When you select the Location subgroup organization type, you can select this check box to have Workday apply the time zone of the location to schedules for workers in that location. This enables you to support multiple subgroup time zones for a single HLSO. If you don't select the check box, Workday uses the HLSO time zone.
Apply Daily Overtime Apply Weekly Overtime	Select to enable Workday to account for the cost of daily overtime, weekly overtime, or both when creating schedules. Also enables validations when a worker is scheduled for hours that exceed the daily or weekly overtime configuration. This value is also used in the Labor Budget calculation but doesn't necessarily reflect what the worker will actually be paid. Workday applies the configured overtime rate for hours above the overtime thresholds for the projected scheduled and projected actual costs. The options you configure here don't impact Workday Time Tracking.
Overtime Threshold	Enter the number of daily hours, weekly hours, or both, beyond which a person is scheduled for overtime. The options you configure here don't impact Workday Time Tracking.
Overtime Rate	Enter the overtime rate used to estimate the cost of schedules. The options you configure here don't impact Workday Time Tracking.

3. Create schedule validations.

   See Steps: Create Schedule Validations on page 2168.
4. Create Schedule Tags on page 2205.
5. Set Up the Optimization Engine on page 2173.
6. Configure the schedule options that are available for managers.

   See Steps: Set Up Schedule View for Managers on page 2160.
7. Configure additional options for workers. As you complete the Worker Experience tab, consider:

Option	Description
Enable Shift Bidding	Select to enable workers to bid on open shifts. After the worker submits a bid, the manager is notified and selects a worker to take the shift.

Option	Description
	You can't modify this setting if there are in-progress Cover Shift events. You must also configure the *Cover Shift Bidding Event* business process with the*Select Worker to Cover Shift*action step to use this feature.
Allow Workers to Cover or Swap Overlapping Shifts	Select to allow workers to cover shifts that overlap with shifts in their schedule. Workday warns the worker but allows them to take the shift. If you don't select this option, Workday prevents the worker from covering overlapping shifts.
Enable View My Team's Schedule	Select to enable workers to view the published schedules of other workers in their scheduling organization by accessing the View My Team's Schedule task. Workers can see other workers': • Shift start times and end times. • Schedule tags. • Meals and breaks.
Number of Previous Days Workers Can View	Enter a value to control the number of days in the past for which a worker can view their team's schedule. Example: A worker can't view their team's schedules that are more than 7 days in the past.
Days Before Shift to Lock Worker Actions	Enter the number of days before a shift's start date during which workers can't take action on the shift. If you enter 1, workers can't take shift actions starting 1 day before the shift. If you enter 0, workers can take shift actions even on the day of the shift.
Allow ~Workers~ to be On Call	Enable workers to indicate whether they'd like to be on call. Workday displays an Available on Call check box for workers to select on the Change My Schedule Preferences task. The indicator is used on the Good Faith Estimate report, which shows workers that have chosen to be on call.
Enable Voluntary Standby List	Enable workers to indicate whether they'd like to be on a voluntary standby list. Workday displays a Voluntary Standby List check box for workers to select on the Change My Schedule Preferences task. The indicator is used on the Good Faith Estimate report, which shows workers who have volunteered to be on standby.

Related Information

Tasks

Create Locations

Create Rules for Meals and Breaks on page 2810

Maintain Organization Types

Examples

Troubleshooting: Scheduling After Organization Changes on page 2213

Concept: Scheduling Organizations

There are 3 different types of organizations that you can use in Workday Scheduling: high-level scheduling organizations, scheduling organizations, and subgroup organizations.

Organization Type	Description
High-level scheduling organization (HLSO)	The organization that determines the scheduling settings for organizations below itself in the organizational hierarchy.
Scheduling organization (SO)	The organization in which workers can be scheduled to work. A scheduling organization can also be a high-level scheduling organization.
Subgroup organization	A subset of a scheduling organization that enables you to take action on a smaller group of workers.

High-Level Scheduling Organizations

You can define supervisory organizations or custom organizations as HLSOs. Workday recommends that you use a supervisory organization as your HLSO. You must configure at least one HLSO. Settings you can define at the HLSO level include:

- The start day of week for the schedule.
- Location and time zone.
- Validations.
- Schedule tag types and values.
- Labor demand period length.
- Schedule appearance and options for managers and workers.

To configure these settings, use the Edit Scheduling Settings task. The configuration choices you make for the HLSO will flow down to the scheduling organizations below it in the hierarchy. If you need to schedule members of an HLSO, then it can also be a scheduling organization.

Scheduling Organizations

You can define supervisory organizations, custom organizations, or groups of supervisory or custom organizations as scheduling organizations. Scheduling organizations determine the workers who are included in a schedule. Example: A group of workers share a manager, and that manager is in a supervisory organization enabled as a scheduling organization. Those workers are scheduled together.

The settings you configure for HLSOs will flow down to the scheduling organizations below them in the organization hierarchy. If more than 1 HLSO exists on a hierarchy, the scheduling organization will inherit the settings from the HLSO nearest to it in the hierarchy.

Managers, scheduling partners, and scheduling administrators can assign a shift to a worker in a different scheduling organization if both scheduling organizations roll up to the same HLSO. Workers can also pick up shifts or swap shifts from outside of their scheduling organization as long as:

- The worker is qualified to work the shift they're attempting to pick up or swap.
- The worker's scheduling organization and the shift's scheduling organization both roll up to the same HLSO.

Subgroup Organizations

You can define subgroup organizations on an HLSO. Subgroup organizations can be locations or custom organizations enabled as financial worktags. Using subgroup organizations enables you to divide the population of your scheduling organization into smaller groups of workers. You can then define labor demand and view and report on schedules and schedule data for subgroups.

Example: At your fitness center, you make each of these departments a separate subgroup organization by enabling them as a custom worktag:

- Day Care
- Cafe
- Swimming Pool

Some of the schedule attributes you can define at a subgroup level include:

- Labor budget.
- Labor demand.
- Productivity targets.
- Sales forecast.

You can view the results of these attributes using the Sales and Productivity modal on the schedule.

Related Information
Tasks
Steps: Set Up Scheduling Organizations on page 2153
Steps: Set Up High-Level Scheduling Organizations on page 2154

Schedule Generation Settings

Steps: Set Up Schedule View for Managers

Prerequisites

Steps: Set Up High-Level Scheduling Organizations on page 2154

Security: *Set Up: Scheduling: Maintain Scheduling Organizations* domain in the Scheduling functional area.

Context

You can control how Workday displays the Schedule Workers report to managers when they create or edit schedules.

Steps

1. Access the Edit Scheduling Settings task.
2. As you complete the Manager Experience tab, consider:

Option	Description
Schedule Generation Strategy	Select a strategy: • Static Scheduling: Enable Workday to create schedules based on schedule patterns. • Labor Optimization: Enable the Optimization Engine to create schedules. • Manual Scheduling: Enable managers to create schedules using the Generate

Option	Description
	Schedule or Create Schedule Manually buttons, or to use the Copy from a Prior Week option.
Allow Create Schedule Manually	Select to enable managers to manually create schedules from scratch when no labor demand exists. If you don't select this option, managers will only be able to do one of these actions: • Copy a schedule from a prior week. • Edit schedules that the Optimization Engine generates.
Allow Copy Schedule from a Prior Week	Select to add a Copy from Prior Week option to the manager view of schedules. When a manager copies a schedule from a prior week, Workday prompts them to select a week in the past or future. Workday then copies all shifts, shift assignments, and shift details from the week they selected into the current week and places the schedule in Draft status. Workday creates an unassigned shift for each shift conflict that arises due to terminated workers in the target week, and/or if there are approved worker time off or leave of absence events.Prior week shifts are copied, even if the schedule is in Draft status. Workday also copies the most recently published version of each shift if there are any: • Pending draft or swap shifts on a published schedule. • Cover pending, take back pending, or open pending events. • Shifts in Changes Pending, New Shift Pending, or Delete Pending status. • Shifts at Changes Needed status. • Shift Bidding events in progress.

3. (Optional) When you select Static Scheduling as the Schedule Generation Strategy, you can configure how Workday behaves when you generate static shifts on a schedule where absences already exist.

Option	Description
Absence Event Status Must Be	Select an absence event status. Only absence events of this status will trigger the shift conflict behavior you select in the Absence and Shift Conflict Behavior field.
Absence and Shift Conflict Behavior	Define how Workday behaves when you generate static shifts on a schedule where absences already exist.

Option	Description
	Example: You select Unassign Shifts from Worker. When a worker has an absence event, Workday will unassign static shifts that occur at the same time.

4. As you complete the Calendar Options section, consider:

Option	Description
Scheduling Productivity Template	Select a productivity template to apply to the High-Level Scheduling Organization (HLSO), or create a new one. Productivity templates give you the ability to show, hide, or rename metrics on the Sales and Productivity modal.
Show Sales and Productivity Modal	Select to enable managers to view the Sales Productivity Modal. Managers can view the modal by clicking on the bar chart icon on a schedule.
Show Sales Forecast	Select to enable managers to set the dollar amount allocated for the week's sales goal. Managers enter this value on the Labor Demand tab on schedules. You can load the sales forecast into Workday, but Workday only displays it when you select this option.
Show Labor Budget	Select to enable managers to set the monetary amount allocated for the week's budget. Managers enter this value on the Labor Demand tab on schedules. You can load the labor budget into Workday, but Workday only displays it when you select this option.
Forecast and Budget by Day	Select to enable managers to: • Enter sales target and labor budget values for each day of the week in the Schedule Productivity Plan section of the Details tab on the Labor Demand tab. • View daily, rather than weekly, values on the Schedule Productivity modal.
Labor Budget Type	Select either Cost or Hours to control whether the organization’s budget is in cost (a currency value) or hours. By budgeting in hours instead of currency, you can compare the total number of hours scheduled to the total number of hours in the budget to see how well you’re scheduling your workers.

5. Display Absence Details on Schedules on page 2191.

6. Configure Default Weekly View and Default Daily View options.

   You can define which attributes Workday displays on the weekly and daily schedule views when managers initially view the schedule. Managers can then use the Change View button on the schedule to choose whether or not to view these attributes:

   - Schedule versus Demand
   - Gaps in Coverage
   - Shift Notes
   - Meal
   - Break
   - Shift Duration
   - Time Off Duration
   - Holiday Duration
   - Meal/Break Duration
   - Unscheduled Workers
   - Unassigned Shifts
   - Display Absences
   - Worker Total Hours
   - Worker Availability
   - Total Daily Hours
   - Color Coding

   When you select the Show Hours Variance option, Workday displays a Schedule versus Demand row on the schedule that displays the variance between the labor demand values you entered and the hours that Workday added to the generated schedule. Viewing the variance can help you to identify times when you might be overstaffed or understaffed. This option is only available on the weekly view.

   The Default Start Time controls the start time of day displayed when a manager selects the day view. Example: A store begins operating at 8AM. If you don't define a start time, Workday populates the start time to 12AM. Managers can't override the default start time.
7. Select a Group by Default option that controls how Workday groups shifts when managers initially view a schedule. You can set a different Group by Default for the Day and Week views of the schedule. You can choose to group shifts on the schedule by schedule tag type, subgroup organization, or workers.

Define Working Hours

Prerequisites

Security: *Set Up: Scheduling: High Level Scheduling Settings* domain in the Scheduling functional area.

Context

You can create configurations that define whether Workday counts time off or holiday time towards working hours for the week. You can then apply that configuration to these validations so that they take time off and holiday time into account:

- Minimum Weekly Hours
- Maximum Weekly Hours
- Maximum Working Days
- Weekly Overtime Threshold

Your configuration also determines whether or not holidays display on the Schedule Workers report.

Steps

1. Access the Scheduling Validation Working Hours Configuration task.
2. As you complete the Time Off section, consider:

Option	Description
Include All Time Offs	Select to include all time offs as working time.
Time Offs	Select the time offs that you'd like to include as working time.
None of the above	Select to exclude all time offs from working time.
Time Off in Days Converted to Hours	Workday converts 1 day of time off into the number of hours that you define. Example: You enter 8 in this field. Workday converts 1 day of time off into 8 working hours.

3. As you complete the Holiday section, consider:

Option	Description
Holiday Calendar	Select the holiday calendar that contains the holidays you want to include as working time. When you use the scheduling validation working hours configuration in any validation, Workday automatically displays the holidays from the associated holiday calendar on the daily and weekly view of schedules for all workers in the HLSO. You can use worker overrides to limit the holidays that workers can see on the schedule. Create a scheduling validation working hours configuration with the appropriate holiday calendar. Then, use that scheduling validation working hours configuration in validations on the worker override. The worker override takes precedence over the configuration on the HLSO. Note: The length of the holiday that displays on the schedule is derived from the hours configured on the scheduling validation working hours configuration, rather than the start and end time of the holiday on the holiday calendar.
Hours	Workday converts 1 holiday into the number of hours you define.

Result

You can select the configuration in the Additional Hours Configuration column when configuring scheduling validations.

Example

A worker has a minimum weekly hours validation of 20 hours, a maximum weekly hours validation of 40 hours. You create a scheduling validation working hours configuration that includes all time offs. The worker submits a time off request for 8 hours in a week. Workday Scheduling won't schedule the worker for more than 32 hours or for less than 12 hours that week to account for the paid time off.

Reference: Scheduling Settings Details Web Service

Parameter Name	Type/Value	Description
Start_Day_of_Week_Reference	Day_of_the_WeekObject	Start day of week for the settings. If labor demand and/or a schedule exists after the HLSO snapshot effective date, you can't update this value. To update the value add a new HLSO snapshot effective date after your latest labor demand entry or scheduled week.
Location_Reference	LocationObject	Location for the scheduling organization. This determines the default time zone for each scheduling organization. If labor demand and/or a schedule exists after the HLSO snapshot effective date, you can't update this value. To update the value add a new HLSO snapshot effective date after your latest labor demand entry or scheduled week.
Demand_Period_Length_Reference	Scheduling_Organization_Configuration_Demand_Length_Object	Demand period length for labor demand. If labor demand and/or a schedule exists after the HLSO snapshot effective date, you can't update this value. To update the value add a new HLSO snapshot effective date after your latest labor demand entry or scheduled week. See: Add Labor Demand on page 2173.
Meal_and_Break_Rule_Set_Details	Scheduling_Break_Configuration_Details_WS	Meal and break rule set for the scheduling organization. See: Create Rules for Meals and Breaks on page 2810.
Include_Leader_as_part_of_the_Schedule	boolean	Include leader in the schedule.

Include_Members_of_Subordinate_Organization	Boolean	Include members of subordinate organizations in the schedule.
Scheduling_Subgroup_Org_Configuration_Reference	Scheduling_Subgroup_Org_Configuration_Reference	Subgroup organization configuration for the scheduling organization. You can enable subgroup organizations, set a type, and select subgroup organization values. If labor demand and/or a schedule exists after the HLSO snapshot effective date, you can't update this value. To update the value add a new HLSO snapshot effective date after your latest labor demand entry or scheduled week. See: Steps: Set Up Scheduling Organizations on page 2153 and Steps: Set Up High-Level Scheduling Organizations on page 2154.
Scheduling_Overtime_Configuration_Overview	Scheduling_Overtime_Configuration_Overview_Reference	Set the daily and weekly overtime thresholds and the overtime multiplier.

Static Scheduling Configuration

Steps: Set Up Static Scheduling

Prerequisites

Context

Static scheduling enables you to utilize work schedule calendar patterns for workers that Workday will use to automatically populate schedules in Workday Scheduling. This makes it easier for you to create schedules for workers who have few changes to their schedule from week to week.

You can configure individual high-level scheduling organizations to use static scheduling. You can also configure these business processes so that a manager will flow through the necessary steps when setting up a worker for static scheduling:

- Assign Work Schedule
- Assign Shift Profiles to Worker
- Change Worker Schedule Tags

Example: Alec's manager, Sue, creates a work schedule calendar with shifts from 10:00AM to 6:00PM from Monday to Friday. This work schedule calendar has 2 shift profiles. After Sue assigns the work schedule calendar to Alec, Workday directs Sue to the Assign Shift Profiles task from the *Assign Work Schedule Calendar* business process. On the Assign Shift Profiles task Sue can review and add or update Alec’s shift profiles. From here, a business process step takes Sue to the Change Worker Schedule Tags task where Sue can validate that the schedule tags on the shift profile match what is assigned.

Steps

1. Access the Edit Scheduling Settings task.

   On the Manager Experience tab, select Static Scheduling from the Schedule Generation Strategy field.

   Security: *Set Up: Scheduling: Maintain Scheduling Organizations* domain in the Scheduling functional area.
2. Access the Create Work Schedule Calendar task or the Edit Work Schedule Calendar task.

   In the Scheduling section, select the Enable for Static Scheduling check box.

   Security: *Set Up: Calendar* domain in the System functional area.
3. Access the Pattern tab.

   Workday doesn't support the ability to use calendar events with static scheduling. You must use week patterns to define shifts.
4. Enter a Pattern Start Date.

   Workday strongly recommends that you select a pattern start date that matches the start day of week you've configured for the high-level scheduling organization. You can view the Start Day of Week on the Settings tab on the Edit Scheduling Settings task.
5. Add a row for each distinct week in the schedule.
6. Click Pattern Details. As you select the Schedule Pattern Type, consider:

Option	Description
Single Shift and Meal	You can create a single shift with a single meal for each day. You can associate the shift with 1 shift profile.
Multiple Shifts and Meals	You can create multiple shifts and meals for each day. You can also associate different shifts in a day with different shift profiles. Example: You associate the 9:00AM - 12:00PM shift with Shift Profile 1. You associate the 1:00PM - 5:00PM shift with Shift Profile 2.

   Note: Workday Scheduling only supports meals, not breaks. Ensure that the pattern you create only includes meals.
7. Enter shift details for each day of the week. Select a Shift Profile to associate with each shift or day in the schedule pattern.

   Workday uses the shift profile to determine the subgroup organization and schedule tags of the worker so that Workday can create the worker's shifts in Workday Scheduling.
8. Access one of these tasks to assign the work schedule calendar to the appropriate workers:

   - Assign Work Schedule
   - Assign Custom Work Schedule

   You can only use static scheduling when you directly assign work schedule calendars to workers (rather than assigning work schedule calendars through eligibility rules).

   Security: Configure the *Assign Work Schedule* business process and security policy in the Workday Scheduling functional area.

9. Access the Assign Shift Profiles to Worker task to update and assign shift profiles to each static scheduling worker.

   Enter the relevant position, subgroup organization, and schedule tags for each shift profile. Workday automatically populates these details on shifts. If a worker's shift profile contains schedule tags that aren't yet assigned to the worker, you must also update the worker's schedule tag assignments.

   Workers must have the same number of shift profiles assigned to them as exists on their assigned work schedule calendar pattern. A worker may have more than one shift profile if they work one job on some days, and a different job on other days. This situation is different from a worker with multiple positions, as you can have 1 position but still perform multiple roles using different schedule tags.

   Security: Configure the *Assign Shift Profiles to Worker* business process and security policy in the Workday Scheduling functional area.

Result

When you create a schedule using the Schedule Workers report, Workday will automatically create shifts for workers you've set up for static scheduling. If workers have time off or a leave of absence, Workday won't populate a shift on those days. Workday runs your configured validations on static shifts.

When a shift crosses from one week into the next, Workday doesn't display the cross-week shift in the subsequent week's schedule. For weekly validations and cost values, Workday groups all of the hours and costs from cross-week shifts with the week where the shift starts. Example: Laura has a shift from 10PM Saturday to 4AM Sunday with Sunday being the first day of a new weekly schedule. When assessing the total weekly hours, Workday counts Laura's entire 6-hour shift (including her hours from 12AM-4AM on Sunday) in the previous week's total hours.

Next Steps

Shift profiles might become outdated. Example: A worker moves from 1 HLSO to a different HLSO that uses different subgroup organizations and schedule tags. Update the worker's shift profiles to use the new HLSO values. Similarly, if you disable subgroup organizations or a schedule tag type on the HLSO, you'll need to update the shift profiles that used that subgroup organization or schedule tag type.

You can access these web services to assign shift profiles and work schedule calendars:

- *Assign Shift Profiles*
- *Assign Work Schedule Calendars*

You can use the Scheduling Workers with Work Schedule Calendar Assignments report to quickly check workers' work schedule calendar assignments.

Related Information

Tasks

Steps: Assign Schedule Tags on page 2203

Create Work Schedule Calendars

Manually Assign Work Schedule Calendars

Examples

2023R1 What's New Post: Static Scheduling

Validations

Steps: Create Schedule Validations

Prerequisites

Security: *Set Up: Scheduling: Maintain Scheduling Organizations* domain in the Scheduling functional area.

Context

You can create validations to warn managers when they create schedules or shifts that violate business or regulatory requirements. When you create validations, you can select a severity level of either Critical or Warning for each validation type. Workday displays critical validations in red and warning validations in yellow. Managers can publish a schedule with either critical or warning validations present, neither validation prevents Workday from publishing a schedule.

You can prevent managers from publishing or changing a published schedule when validations are present by setting up condition rules on these business processes:

- *Publish Schedule*
- *Change Published Schedule Event*
- *Bulk Change Published Schedule Event*
- *Mass Change Shifts Event*

Workday executes validations when managers generate a schedule or when they create, edit, or delete a shift. Workday doesn't automatically execute validations on existing schedules when you make a configuration change or when a worker requests time off. Managers must manually refresh the schedule by clicking the Refresh Schedule option from the Actions drop-down for Workday to account for those changes.

Note: When you make configuration changes, you must manually refresh each schedule that the change impacts.

Steps

1. Access the Edit Scheduling Settings task.
2. On the Validations tab, select the Enabled check box to enable Workday-delivered validations. Enter relevant values for each validation type.

   See: Reference: Scheduling Validations on page 2169
3. In the Additional Hours Configuration column, select an existing Scheduling Validation Working Hours Configuration or create a new one.

   Configuring a scheduling validation working hours configuration gives you the ability to control whether Workday includes time off or holiday hours in the hours evaluated by a validation.

   This setting automatically applies to all workers under the High-Level Scheduling Organization (HLSO) and its subordinate organizations. Managers can override this setting at the worker level.

   See: Define Working Hours on page 2163
4. Add custom validation text in the Error Message column.
5. In the Validation Usage Type column, select UI and Solver.

Reference: Scheduling Validations

Scheduling validations determine the length and placement of shifts that the Optimization Engine creates. You can enable, disable, and modify these validation types for high-level scheduling organizations.

You can also define whether Workday includes time off and holiday time as working time in validations. To include time off and holiday time, select a Scheduling Validation Working Hours Configuration for each validation type.

For weekly validations, Workday groups all of the hours from cross-week shifts with the week where the shift starts. Example: Laura has a shift from 10PM Saturday to 4AM Sunday with Sunday being the first day of a new weekly schedule. When assessing the total weekly hours, Workday counts Laura's entire 6-hour shift (including her hours from 12AM-4AM on Sunday) in the previous week's total hours.

Validation Type	Description
Minimum Shift Length (Hours) Maximum Shift Length (Hours)	The minimum and maximum shift lengths in hours. Enter the longest possible and shortest possible shift lengths for the organization. You can use overrides to limit the shift lengths for particular groups of workers in the organization.
Minimum Rest Between Shifts (Hours)	The minimum rest time that a worker must receive between scheduled shifts.
Minimum Weekly Hours Maximum Weekly Hours	The maximum and minimum number of hours that a worker can be scheduled to work in a week.
Maximum Working Days	The maximum number of days that a worker can be scheduled to work in a week.
Weekly Overtime Threshold Daily Overtime Threshold	The threshold over which hours will be counted as overtime. Example: You enter 40 as the Weekly Overtime Threshold. If a worker is scheduled for 42 hours in a week, 2 of those hours will be considered overtime.
Split Shifts Threshold	Split shifts occur when a worker is scheduled for two or more shifts in a single day with a gap between the end of one shift and the beginning of the next that could qualify the worker for premium pay. You can configure the length of the threshold and the severity of the validation. Example: At your organization, any gap greater than 2 hours between shifts that start on the same day qualifies workers for premium pay. You enter 2 as the Split Shifts Threshold.
Maximum Daily Hours	The maximum number of hours that a worker can be scheduled to work in a day. This validation makes it easier for you to schedule populations of workers who work multiple roles or at multiple locations, or who work multiple shifts on the same day. Example: Greg works as a Cashier from 9AM-1PM and a Store Associate from 4PM-7PM. The validation includes the total hours for all shifts that start on the same day, but excludes meal and break time. Note: The Optimization Engine currently doesn't respect the Maximum Daily Hours validation, so Workday may create a shift that violates the maximum daily hours. However, if you've configured the validation, Workday will display an error to let the manager know so that they can correct the shift.
Predictive Scheduling	The predictive scheduling penalty is triggered when a manager or scheduler changes a worker's schedule without advance notice.

Validation Type	Description
	See: Steps: Set Up Predictive Scheduling on page 2184.

Rules

Steps: Borrow Workers Across Organizations

Prerequisites

Security: *Set Up: Scheduling: High Level Scheduling Settings* domain in the Workday Scheduling functional area.

Context

You can borrow workers to work in high-level scheduling organizations (HLSOs) outside of their original high-level scheduling organization, so that you can share workers between districts or regions, making it easier for you to give workers the flexibility to work from different locations.

When you enable this feature, managers or schedulers can search for and select workers from outside their HLSO using the worker search functionality on the schedule, and then assign them to a shift in their organization.

The borrowed worker inherits the HLSO settings of the borrowing organization. Example: If the worker is part of Org 15 but is borrowed into Org 35, then the worker will now inherit the configuration of Org 35. If Org 35 has predictive scheduling and shift bidding configured, the worker could now receive predictive scheduling penalties and be able to bid on shifts.

The worker’s costs will only be visible to the manager of the organization that the worker has shifts in. Example: The manager of the worker’s home organization won’t see worker cost if the worker doesn’t have any more shifts in the home organization.

Steps

1. Access the Create Borrow Worker Rule Set task.

   Create rule sets to define the HLSOs and/or scheduling organizations (SOs) that you want to borrow workers from. If you select an HLSO, then all of the SOs under the HLSO in the organization hierarchy will also be automatically selected.
2. Access the Edit Scheduling Settings task and select the relevant HLSO.

   On the Settings tab, in the Borrow Workers Rule Set field, select the rule set you just created.

   If the HLSO has either of these fields selected, then those workers will also be included when borrowing from another HLSO:

   - Include Leader as Part of the Schedule
   - Include Members of Subordinate Organizations

Result

When a worker is borrowed into an organization, their shifts will display as external shifts on the Schedule Workers report. If a worker is borrowed and has a shift in the org, then the worker will be a suggested worker in Replace Worker. If the worker's shift is removed, they will not be suggested anymore.

Create Scheduling Eligibility Rules

Prerequisites

Security: *Set Up: Scheduling: High Level Scheduling Settings* domain in the Scheduling functional area.

Context

You can configure rules that determine eligibility for Workday Scheduling components. Workday can then use eligibility rules to automatically populate values in some processes. Example: Workday can automatically assign schedule tags to workers as part of the *Auto-Assign Schedule Tags* service step on the *Change Job* business process based on the eligibility rules you create.

Workday provides many fields on the Worker and Position business objects that you can reference in eligibility rules. For position-specific data, delivered fields on the Worker object usually reference a worker's primary position. To handle workers with multiple jobs, you can either:

- Define conditions on the Worker object that reference all of a worker's positions.
- Define position-specific eligibility on the Worker object using a calculated field to extract a field from the Position object.

You can also create your own calculated fields to use in eligibility rules.

Steps

1. Access the Create Scheduling Eligibility Rule task.
2. In the Description field, enter a meaningful description for identifying the rule.

   This description displays in prompts when you select from available rules.
3. As you complete the Rule Conditions grid, consider:

Column	Description
And/Or	When you enter 2 or more logical statements, this option controls how Workday uses the statement with the preceding line. All conditions in an And expression must be true for the expression to be true. At least one of the conditions in an Or expression must be true for the expression to be true.
( )	Use the parentheses columns when there are 3 or more logical statements and a combination of Ands and Ors. Example: To say (a and b) or c: • Use the opening parenthesis at the beginning of statement a. • Use And before statement b and a closing parenthesis at the end of statement b. • Use Or at the beginning of statement c.
Source External Field or Condition Rule	The source data for which you're defining a rule condition. You can select a report field or a calculated field. Example: *Job Profile*.
Relational Operator	Select how you want to compare the source data to the next value in your condition. The options depend on the data type of the source. Example: any in the selection list.
Comparison Type	Specify whether Workday will compare the source to another field or to a value you enter in the Comparison Value column.

Column	Description
Comparison Value	Select a comparison field or enter the value to compare to the source.
Order	When you have multiple statements, use the arrows to control the processing order of the statements.

Result

You can view the rule using the View Scheduling Eligibility Rule report.

Labor Optimization Configuration

Set Up the Optimization Engine

Prerequisites

Security: *Set Up: Scheduling: High Level Scheduling Settings* domain in the Scheduling functional area.

Context

Administrators can configure Optimization Engine values that determine the default positions of the sliders on the schedule. Managers can then modify these values on the schedule. If all of the slider values are equal, the Optimization Engine applies internal weightings to some factors. If you enter a value for Consistency, it will take precedence over all other values.

Steps

1. Access the Edit Scheduling Settings task.
2. Select the Scheduling Engine Settings tab.

Related Information
Concepts
Concept: Scheduling Optimization Engine on page 2176

Add Labor Demand

Prerequisites

Security: These domains in the Labor Optimization functional area:

- *Scheduling: Labor Demand*
- *Cost Data*

Context

You can define labor demand so that the Optimization Engine generates a schedule with the right number of workers at the right times of day. To use the Optimization Engine to generate schedules, you must define labor demand. If you don't define labor demand, you can still manually add shifts to the schedule or copy the schedule from a prior week.

You can also import labor demand, sales forecasts, and labor budgets into Workday using these web services:

- Import Labor Demand
- Import Scheduling Period Productivity Data

Steps

1. Configure these security domains in the Workday Scheduling functional area:
   - *Scheduling: Maintain Labor Demand and Tag Sets*to enable managers to view or modify labor demand on theLabor Demandtab.
   - *Scheduling: Budget and Sales Data*to enable managers to view or modify theSchedule Productivity Planon the Labor Demandtab.
2. Access the Schedule Workers task. Select an organization from the organization drop-down.
3. Click the Labor Demand tab. Click the Overview tab for a summary of the labor demand for the week.
4. Click the Details tab. Navigate to each day of the week to identify the headcount for each required schedule tag value or combination of schedule tag values.

   If your scheduling organization has one or more subgroup organizations, each subgroup organization displays in its own tab. You can define different labor demand values for each subgroup organization.

   As you complete the labor demand, consider:

Option	Description
Sales Forecast	Enter a dollar amount for this week's sales goal.
Labor Budget	Enter a dollar amount for this week's budget.
Ratio %	Set the target percentage that you spend on payroll divided by your sales goal.
Add	Add a new schedule tag set to the labor demand.
Clear All	Clears all labor demand data for the day or week.
Copy from a Prior Week	When you copy labor demand for a week from the past, Workday clears all existing labor demand in the week. Workday then copies the labor demand from the week that you select.

Result

When you generate a schedule, the Optimization Engine schedules workers according to the labor demand you entered. When you click the bar chart icon, you can view the Productivity modal on the schedule.

Create Scheduling Productivity Templates

Prerequisites

Security: Set Up: Scheduling: High Level Scheduling Settings

Context

You can use productivity templates to customize the Sales and Productivity modal. You can customize these aspects of the modal:

- Labels for fields on the modal.
- Calculations that override the default shift rate and unassigned shift rate.

When you create custom calculations to override the default shift rate and unassigned shift rate, Workday doesn't convert the values to different currencies, so you must create separate templates for different currencies.

Steps

1. Access the Create Scheduling Productivity Template task.
2. In the Scheduling Productivity Metrics grid, enter your organization's preferred labels in the Override Titles column.
3. (Optional) Select Override Worker Pay Rate to override the default pay rate defined for workers and to instead use a calculated field to define the pay rate.

   When you create a calculated field for this field, you must use a calculated field on the *Position* business object that returns a currency value. You can't save the template if you select a field from a different business object or that returns a non-currency value.

   If the pay rate is a negative value, Workday treats it as zero.
4. (Optional) Select Override Unassigned Shift Rate to override the default shift rate defined for workers and to instead use either:

   - A static numeric value.
   - A calculated field.

   When you create a calculated field for this field, you must use a calculated field on the Schedule Shift business object that returns a currency value. You can't save the template if you select a field from a different business object or that returns a non-currency value.

Result

When managers view the Sales and Productivity modal, they'll see values based on the calculations you've configured.

Example

Creating a Calculated Field to Override Worker Pay Rate	You need to override the default worker pay rate so that:
	• Hourly workers are paid the appropriate hourly rate.
	• Contingent workers are paid the appropriate rate based on their contract.
	1. Select Override Worker Pay Rate.
	2. In the field, select Create Calculated Field.
	3. Enter these values:
	  • Field Name: *Worker hourly rate*
	  • Business Object: *Position*
	  • Function: *Evaluate Expression*
	4. Click OK.
	5. On the Create Calculated Field - Evaluate Expression page, enter these values:
	  • Field Type: *Numeric*
	  • Default Value:*0*

6. In the first row of the grid, enter:
    - Condition:*is hourly worker*
    - Return Value If Condition is true:*Hourly Rate - Amount*
7. Add a new row. Enter these values:
    - Condition:*Contingent Worker*
    - Return Value If Condition is True: *Contingent Worker Pay Rate Annualized in USD*
8. Save the calculated field.

Creating a Calculated Field to Calculate Unassigned Shift Rates

You want to calculate the cost of unassigned shifts.

1. Select Override Unassigned Shift Rate.
2. In the field, select Create Calculated Field.
3. Enter these values:
    - Field Name: *Total Unassigned Shift Cost*
    - Business Object: Schedule Shift
    - Function: *Sum Related Instances*
4. Click OK.
5. On the Create Calculated Field - Sum Related Instances page, enter these values:
    - Related Field: *Workers with Availability and Schedule Tags for Shift*
    - Related Business Object: *Worker*
    - Sum: *All instances*
    - Field to Sum: *Hourly Rate - Amount*
6. Save the calculated field.

Related Information

Concepts

Concept: Productivity Modal on page 2179

Concept: Scheduling Optimization Engine

What Is the Optimization Engine?

The Optimization Engine uses artificial intelligence to compare many possible scheduling scenarios to generate the schedule that most effectively meets your needs. The Optimization Engine creates schedules by taking these factors into account:

- Labor demand needs.
- Worker attributes (such as qualifications, availability, and preferences).
- Your configuration and business objectives.

To create schedules, the Optimization Engine designs shifts by determining their length, start time, and end time. As the Optimization Engine designs shifts, it simultaneously assigns those shifts to qualified workers to meet labor demand needs. The Optimization Engine also optimizes the schedule to meet business objectives as much as possible while not violating any hard constraints.

Labor Demand

The Optimization Engine relies on labor demand data defined at the scheduling organization (SO) level to generate schedules. You define labor demand for an organization by specifying:

- The type of work that needs to be done.
- The number of workers required to do the work.
- The specific period of time in which the work needs to be done.

Shift Design and Assignment

Shift length is determined by a combination of High Level Scheduling Organization (HLSO) settings and labor demand. The Optimization Engine doesn't create shifts that occur outside of the time period called for by the labor demand. The Optimization Engine also won't create shifts that violate minimum shift length validations, maximum shift length validations, or meal rules you've defined for the HLSO. The Optimization Engine instead creates meal periods as defined on the HLSO and attempts to stagger meal periods to best meet coverage requirements. If the Consistency setting is greater than zero, the Optimization Engine might also create shifts based on the start and end times of a worker's shift in the lookback period.

Workday never generates a schedule with unassigned shifts. If a worker isn't available to be assigned to a shift, that shift isn't included in the schedule. Workday automatically indicates where there are gaps in coverage between the labor demand and the generated and assigned shifts. Workday also indicates where there might be overcoverage or undercoverage.

Hard Constraints: Fixed or Relaxable

The Optimization Engine only creates schedules that don't violate any of these fixed hard constraints:

- Availability: If a worker has time off or a leave of absence without a scheduling effect that overlaps the shift, the worker is considered not available.
- Maximum Shift Length: A shift can't be greater than the maximum shift length as defined by the HLSO.
- Minimum Rest Periods between shifts.
- Minimum Shift Length: a shift must be at least the minimum shift length as defined by the HLSO.
- Meal Rules: a shift must comply with the meal rule defined by the HLSO.
- 1 shift per day: Workday will only automatically assign a worker to 1 shift per day, even if a worker has more than 1 position or more than 1 schedule tag assignment.
- No overlapping shifts: a worker can't be assigned to more than 1 shift at a time.
- Schedule tag qualification: a worker must be qualified for a shift through their schedule tag assignment to be assigned to the shift.

The only time a hard constraint could be violated is when consistency is enabled for the schedule week being generated. In this case, if a shift has been manually updated to violate a minimum or maximum hour or meal rule in the lookback period, it could be possible for that violation to be carried forward to the week being scheduled.

There are also relaxable hard constraints that are sometimes hard constraints and sometimes not. When they aren't hard constraints, they're referred to as objectives. You can configure whether these constraints are relaxable (and treated as objectives) or hard constraints through schedule settings:

- Maximum weekly hours.
- Maximum working days.

If the Optimization Engine is unable to find a schedule solution that doesn't violate a hard constraint, the Optimization Engine might relax the Labor Demand hard constraint and the Minimum Weekly Hours hard constraint. The Optimization Engine treats these constraints as soft constraints so a solution can be found that doesn't violate any of the other hard constraints.

Soft Constraints/Objectives

As Workday Labor Optimization solves for hard constraints, it also attempts to meet the business objectives that are defined at the point of schedule generation. Adjustable soft constraints are objectives that the Optimization Engine attempts to respect as much as possible. When the Optimization Engine meets these constraints, it improves the schedule quality and score, but if the soft constraints aren't met, the Optimization Engine still generates a schedule. Soft constraints include:

- Consistency
- Demand Coverage
- Labor Cost
- Maximum Weekly Hours
- Minimum Weekly Hours
- Maximum Working Days
- Preferred Days/Times
- Preferred Schedule Tags
- Preferred Weekly Hours

Soft constraints are configured by HLSO and weighted on a scale from 0-100. To configure the Optimization Engine to ignore a soft constraint, you can set the weight to zero. You can override these settings at the worker level. Worker level overrides take precedence over slider settings at the point of schedule generation.

Workday maintains intrinsic weightings that determine the relative importance of each of the soft constraints. These are Workday's intrinsic weightings from greatest weight to least weight:

1. Consistency.
2. Maximum Weekly Hours.
3. Minimum Weekly Hours.
4. Maximum Working Days.
5. Demand Coverage.
6. Labor Cost.
7. Preferred Weekly Hours.
8. Preferred Schedule Tags.
9. Preferred Days/Times.

These settings are automatically populated by the setting configuration on the HLSO.

Sliders

When managers generate a schedule they can use sliders to control the weightings of different soft constraints. When a schedule is initially generated, Workday automatically places the sliders based on the settings defined for the HLSO. Once managers adjust the slider settings and generate a schedule, Workday carries forward the schedule settings to the next week.

Consistency

The consistency value allows you to create schedules that are copies, or close to copies, from week to week. Consistency copies shift start and end times and meals, but not schedule tags. If the schedule setting is greater than zero, consistency will be weighted more heavily than all other soft constraints.

Workday looks back either 1 or 2 weeks (depending on HLSO or override configuration) to find a reference schedule to compare against. If the reference schedule includes time off, Workday looks back another single lookback cycle of 1 or 2 more weeks to find a week without time off. If Workday can't find a reference schedule for a worker the Optimization Engine ignores consistency for that worker.

If the consistency setting is greater than zero, and a shift exists in the reference week where you've manually overridden one or more of these rules, Workday might respect the manual override and bring it into the current week:

- Meal.
- Maximum Shift Length.
- Minimum Shift Length.

If a shift in the reference week isn't required to meet the current week's labor demand, Workday might still generate the shift within the current week.

Schedule Score

After the Optimization Engine generates a schedule, it gives the schedule an overall score based on these dimensions:

- Consistency.
- Coverage.
- Labor cost minimization.
- Workers' preferred schedule tags.
- Workers' preferred weekly hours.

Workday also provides a score for each dimension and a description of how the schedule met each dimension. The soft constraint weightings you defined don't affect the schedule score or the scores of each dimension. Example: You set the Consistency weighting to *Low*. The Optimization Engine generates a schedule that includes shifts that aren't consistent with shifts in the prior lookback cycle. Therefore, the Consistency score will likely display as Poor.

Worker Replacement Score

When workers can take a shift without violating hard constraints (such as availability and schedule tag qualifications), Workday recommends them as replacement workers for existing shifts. Workday ranks recommended workers in order based on their replacement score. Workday displays a replacement score as a Match %. Workday calculates the Match % by taking these factors into account:

- Workday considers workers with a higher pay rate or who will incur overtime as a lower match.
- The further away the shift would take a worker from their preferred working hours, the lower their match score.
- Workday considers the worker a match if any of their preferred schedule tags exist on the shift.

Related Information
Concepts
Concept: Scheduling Organizations on page 2159

Concept: Productivity Modal

The Productivity modal enables you to compare target, scheduled, actual, and projected hours and costs for a week. When you compare these values you can gain insight into key performance indicators for the schedule.You can access the modal by selecting the bar chart icon on the schedule. Workday immediately refreshes the modal data when you:

- Add or remove shifts from the schedule.
- Filter by a different subgroup organization.

Workday includes workers' actual values in the modal when you view their scheduling organization. Workday only displays actual values in the subgroup organization view when workers either:

- Have the subgroup organization assigned to them as a default organizational assignment.
- Apply the subgroup organization worktag to their time blocks in Time Tracking.

Target Values	Calculation Details
Sales	The U.S. dollar amount allocated for the sales goal that week. Reflects the value entered on the Labor Demand tab. If you don't enter target sales forecast values on the Labor Demand tab, Workday displays zero.

Target Values	Calculation Details
Labor Cost	The U.S. dollar amount allocated for the budget that week. Reflects the value entered on the Labor Demand tab. If you don't enter target labor cost on the Labor Demand tab, Workday displays zero.
Ratio %	Target Labor Cost / Target Sales.
Hours	The total labor demand for the week.

Scheduled Values	Calculation Details
Labor Cost	Scheduled Hours x Worker's Hourly Pay Rate. The rate is based on the worker's pay rate type. If workers are salaried, we deannualize their total base pay rate by the hourly rate defined using the Maintain Frequencies task to get their hourly rate. If a worker's hours exceeds the threshold set on the HLSO, Workday calculates their overtime by multiplying the overtime rate defined for the HLSO by the worker’s overtime hours. Reflects compensation effective as of the start of the week. Doesn't include cost for unassigned shifts.
Ratio %	Scheduled Labor Cost / Target Sales. If you didn't enter target sales, displays as zero.
Hours	Total hours in the schedule. Workday includes hours associated with unassigned shifts.
Sales per hour	Target Sales / Scheduled Hours.

Actual Values	Calculation Details
Actual Labor Cost	Worker's Hourly Pay Rate x Worked Hours. If a worker's hours exceed the threshold set on the HLSO, Workday calculates their overtime by multiplying the overtime rate defined for the HLSO by the worker’s overtime hours.
Actual Ratio %	Actual Labor Cost / Target Sales.
Actual Hours	Reported hours from Time Tracking. If a worker’s pay rate type is salary, Workday uses their scheduled hours as actual hours. If the worker isn’t salaried but they report time, Workday treats their reported hours as actuals. However, Workday only uses hours from the past in actuals. Workday doesn't include reported hours from the current day when calculating actuals.

Actual Values	Calculation Details
Actual sales per hour	Target Sales / Actual Hours.

Projected Values	Calculation Details
Ratio %	Scheduled Ratio % - [(Actual Labor Cost + remaining Scheduled Labor Cost) / Target Sales].
Hours	Scheduled Hours - (Actual Hours + Remaining Hours). The Remaining Hours are scheduled hours for the week that are either on the current day or future days and not yet counted as Actuals. Example: The total scheduled hours for Monday - Thursday is 200. The scheduled hours for Friday is 50. As of Thursday night, the actual worked hours from Monday - Thursday is 190. For the sake of the projection, the 50 scheduled hours on Friday are considered remaining hours. To calculate the projection, Workday calculates 250 - (190 + 50) = 240.
Sales per hour	Scheduled Sales per hour - [Target Sales / (Actual Hours + Remaining Hours)]. The Remaining Hours are scheduled hours for the week that are either on the current day or future days and not yet counted as Actuals.
Labor Cost	Scheduled Labor Cost - Actual Labor Cost + remaining Scheduled Labor Cost.

Related Information
Tasks
Add Labor Demand on page 2173

Reference: Scheduling Optimization Engine Error Messages

Error Message	Potential Cause	Solution
IllegalStateException: SchedulingOrganization has not yet been loaded for null OR SchedulingOrgLite has not yet been loaded for null	1. The time zone that is used on the HLSO is no longer supported or may have been retired. 2. The processing user doesn't have any scheduling organizations that they're secured to. 3. There is no valid configuration for the active HLSO.	1. Replace the time zone ID on the HLSO with another instance of the same time zone. To check this, access the Location listed on the HLSO, and navigate to the Business Site tab. Edit the Location and under Time Zone confirm it still exists in the drop down. 2. Check for enabled scheduling organizations (or the organization the manager manages). Ensure that the

Error Message	Potential Cause	Solution
		organization is enabled as a scheduling organization, and whether there are security issues. 3. Access the View Scheduling Organization Settings report. View the settings for the active HLSO. Look for the Start Day of Week and/or Location to make sure they're accurate. Ensure that there is at least 1 tag type and 1 tag value.
RuntimeException: failed to read json string. Cause: cannot construct instance of…	The Inherit checkbox on the HLSO may have been selected and then unselected.	Select the Inherit checkbox on the HLSO again.
IllegalStateException: Could not find Tag IDs for Tag Set ID	The Schedule Tag Value was enabled and then disabled, and the schedule tag value exists on the Labor Demand or on a schedule.	Enable the Schedule Tag Value, then clear any labor demand with this schedule tag value, or rescind any published schedules with this schedule tag value. If this is in Production, keep the Schedule Tag Value enabled.
Time…not within the week time range…	1. If a schedule was originally created using one time zone (Example: EST), then reorganized to a different time zone (Example: CST) the schedule will disappear as Workday will load using the new time zone and won't load the original time zone. The time zone between the two must match. 2. If a shift time is outside of the scheduling week (using the subgroup organization time zone), this error appears because Workday creates the schedule using the HLSO time zone. Example: The HLSO time zone is EST but the SGO time zone is Hawaii. There will be a small gap on the schedule where the shift	Submit a Workday Support Case with your customer tenant screenshots.

Error Message	Potential Cause	Solution
	is outside of the EST week start and week end.	
RuntimeException: Unexpected schedule... in previous schedules...	You changed one of the settings on the HLSO Settings tab. Examples include: • Start Day of the Week • Time Zone • Labor Demand Period Length	Revert the changes back to the original settings, and then change the effective date of the HLSO settings and apply your changes with that new effective date.
failed to deserialize into an instance of class SchedulingError[]	The initiating action on the *Publish Schedule* business process security policy with the (REST) suffix doesn't have initiator listed.	This business process security policy must have the correct security groups listed. It cannot be blank.
TimePeriod{start..., end...} culd not be mapped to a week in '[TimePeriod{start..., end...}]'	1. The week is a Daylight Savings week. 2. The start day of the week is on Monday.	Submit a Workday Support Case with your customer tenant screenshots.
We're getting multiple errors: cannot deserialize org config and circuit breaker.	The *Scheduling: Budget and Sales Data* domain security policy isn't enabled.	Enable the *Scheduling: Budget and Sales Data* domain security policy.
java.net.SocketTimeoutException: timeout	The tenant UI has timed out. A stale page has the connection severed for security purposes.	Refresh the page to initiate the action again.

Schedule Management, Communications, and Productivity

Steps: Set Up the Time and Scheduling Hub

Context

You can configure the Time and Scheduling Hub to enable frontline managers to quickly access frequently used Time Tracking, Absence Management, and Workday Scheduling tasks and reports. The Hub includes these tabs:

- A home page that you can configure with additional cards.
- The Schedule Workers task.
- The Review Time report.
- The Edit and Approve Time report.
- A Direct Reports section that displays Time and Scheduling data for individual workers.
- An Operational Analytics section that includes a Team Insights dashboard (Time and Absence Dashboard) and the Scheduled vs. Actuals report.
- The Team Absence calendar.

Workers only have access to the reports and tasks on the hub if they have access to the domains that secure them.

Workers can add the Time and Scheduling Hub as a link in the Menu on the left panel of their Workday Home page. When they search for the Time and Scheduling Hub in order to add it as a link, Workday returns two options both called Time and Scheduling Hub. The two options will link to different tabs on the

Hub. The option that has an icon of a sheet of paper links directly to the Scheduling tab of the Hub. The option that has an icon of a tree diagram links to the Overview tab of the Hub.

Steps

1. Edit Domain Security Policies.

   Configure the *Manager: Time and Scheduling Manager Hub* domain security policy in the Time Tracking functional area.
2. Set Up Hubs.

   Add relevant cards or reorganize existing cards. Configuring cards controls what users see when they access the Overview tab.
3. (Optional) Configure worklets and task links to display on the Team Insights tab.

   Access the Maintain Dashboards task. Edit the Time and Absence dashboard. The Team Insights tab reflects the changes that you make.

   Security: *Set Up: Tenant Setup - Worklets* in the System functional area.

Result

Managers can customize their Workday home page and add the Time and Scheduling Hub as a worklet. Managers can also customize what they see on the Team Insights dashboard by editing the settings for each worklet you've configured.

Next Steps

To hide the Direct Reports section, access the Hide Workday Delivered Report task and select Time and Scheduling Hub Direct Reports View.

Related Information
Examples
The Next Level: Time and Scheduling Hub Next Level Presentation

Steps: Set Up Predictive Scheduling

Prerequisites

Configure these Workday products:

- Time Tracking
- Workday Scheduling

Context

Predictive Scheduling enables you to calculate the penalty for changing a worker's schedule without advance notice as required by some local and state laws.

Steps

1. Create and publish a schedule. You must have a published schedule to trigger the penalties that you configure in a predictive scheduling rule set.

   See: Steps: Set Up Workday Scheduling and Labor Optimization.
2. (Optional) Configure predictive scheduling reason types.

   Access the Maintain Predictive Scheduling Reason Types task to define reason types, configure whether they incur a penalty, and view the total number of rule sets that currently use the reason type.

3. Access the Create Predictive Scheduling Rule Set task.
    - Enter the rule set name.
    - Select the effective date for the rule set. You can create multiple snapshots to help you plan for future changes in legislation or company policies.
    - Configure the Notice Period Comparison Value to specify if the time of the shift change should be compared to Start of Shift or Start of Week.
    - (Optional) Associate the rule set with 1 or more reason types using the Predictive Scheduling Reason Types prompt.

    You can configure as many rules as you need. As you do, consider their order. Workday evaluates the rules in order and creates the penalty block for the first rule that is true, which prevents multiple penalties being created for the same change to the schedule.
4. Add a row for each rule that you need for the high-level scheduling organization.
    - Use the range operator and units to specify the penalty range when the penalty should be triggered. The range can be hours or days.
    - Configure standard or advanced penalty criteria. You can use a standard condition or an advanced condition for each rule, not both. As you complete the penalty criteria configuration, consider:

Option	Description
Standard Condition	Use standard conditions to determine if a change type is true. Select from these change types: • Shift Added • Shift Deleted • Shift Hours Increased • Shift Hours Reduced • Start Time Changed When you select multiple change types, Workday uses OR logic and triggers a penalty whenever 1 change type is true.
Advanced Condition	Use advanced conditions when you use multiple criteria to determine if a penalty is due. Set up a predictive scheduling penalty condition with the criteria that must be met to trigger a penalty. You can use predictive scheduling penalty conditions across multiple rule sets.
Calculated Results	Selected time calculation tags apply to the penalty time block. Use Quantity or Calculated Quantity to specify the quantity for the time block. You can use one or the other per rule. • Quantity is a fixed value. • Calculated Quantity returns the value of the calculated fields. You can use fields on the Schedule Shift Business

Option	Description
	Object, such as Shift Duration, in the calculated quantity.

5. Access the Edit Scheduling Settings task to attach the predictive scheduling rule set to a high-level scheduling organization. You can add only 1 predictive scheduling rule set to each high-level scheduling organization.

   See: Steps: Set Up High-Level Scheduling Organizations.
6. Create a predictive scheduling calculation using calculation group and priority as the calculation criteria. You need only 1 predictive scheduling calculation per tenant.

   See: Create Predictive Scheduling Calculations on page 2745.
7. Configure the *Change Published Schedule* business process and the *Bulk Change Published Schedule* business process to enable predictive scheduling:

   - Add the *Evaluate Predictive Scheduling Penalty* service step to ensure that validations trigger in scheduling.
   - Add the Run Time Calculations for *Predictive Scheduling Evaluation Date* service step as the next step to ensure that predictive penalties are triggered in time tracking.
   - (Optional) Configure the *Acknowledge Change Published Schedule* action to enable workers to accept or deny the changes to their schedule.
8. Configure the *Cover Shift* business process.

   Add these service steps so that Workday creates a predictive scheduling penalty when a worker picks up a shift from the Open Shift Board that falls within the penalty window:

   - *Evaluate Predictive Scheduling Penalty for Cover Shift Event*
   - *Run Time Calculations for Predictive Scheduling Evaluation Date for Cover Shift*

   When configured, if a worker picks up a shift, Workday sends an approval notification to the approver. If the original worker posts the shift to the Open Shift Board and then takes it back, the original worker will not receive the penalty. If a new worker picks up the shift, then the new worker will receive the predictive scheduling penalty.
9. Access the Manage Predictive Scheduling Penalties task.

   Managers can view and update the status of penalties. After the status update, run time calculations again for changes to take effect.

Result

Managers can view a list of penalties on the Manage Predictive Scheduling Penalties task and see details such as the schedule, worker, when the penalty was created, rule set, rule, change types, time blocks, penalty status, and penalty comment.

When a manager navigates to Schedule Workers > Edit Shift Details to edit a shift, and a predictive scheduling penalty occurs:

- They must enter a reason type for each worker in the Schedule Penalty popup if at least 1 reason type is configured for the rule set attached to the HLSO. Based on the selected reason type, Workday displays a message that indicates whether it incurs a penalty.
- If no reason type is configured for the rule set attached to the HLSO, managers can manually override penalties.

Related Information

Examples

2023R2 What's New Post: Predictive Scheduling

Steps: Set Up Shift Change Notifications

Prerequisites

Security: *Set Up: Scheduling: Notifications* domain in the Workday Scheduling functional area.

Context

You can configure notifications that Workday sends to workers as soon as someone changes one of the worker's published shifts. You can also control which types of changes trigger notifications. Example: You want to notify workers when their shift start or end time changes, but not when their position changes.

When a worker receives a shift change notification, the notification includes:

- A list of the details that changed.
- The details for their original shift.
- The details for their updated shift.

When a worker receives a new shift or has a shift removed, they'll only see the details for the current shift in the notification. Workers should always look at the latest notifications in My Tasks to see the current state of their schedule.

Steps

1. Add the Notify Workers of Change to Published Schedule Event service step to the *Change Published Schedule* business process after the completion step.
2. Access the Maintain Change Published Schedule Notifications task.
3. Create a new snapshot with an effective date.

   The effective date is based on the updated shift date. Example: You move a shift from Monday to Friday. Your snapshot effective date is Wednesday. Workday uses the Wednesday snapshot details to create the notification for My Tasks.
4. (Optional) Enter a custom Notification Message.

   Workday displays the message at the top of each notification.
5. Select the check box in the Enabled column for any change that should trigger a notification.

Steps: Automatically Assign Scheduling Settings to Workers

Prerequisites

Steps: Set Up Scheduling Organizations on page 2153

Context

You can automatically assign Scheduling settings for workers when they experience job transitions by adding the *Auto-Assign Scheduling Setting Overrides* service step to these business processes:

- *Change Job*
- *Hire*
- *Request Return from Leave of Absence*

When a scheduling worker goes through one of these business processes Workday applies the first eligible Override Scheduling Settings Template to the worker. You can define template priority on the Maintain Override Scheduling Settings Template task. Workday applies the template as of the effective date of the business process event.

Steps

1. Access the Create Override Scheduling Settings Template task and enter values for the validations and scheduling engine settings.

   Security: *Set Up: Scheduling: High Level Scheduling Settings* in the Workday Scheduling functional area.
2. Create Scheduling Eligibility Rules on page 2171.

   Create an eligibility rule that captures the group of workers to whom you'd like to assign new Scheduling settings.
3. Access the Maintain Override Scheduling Settings Templates task.

   Assign a priority to the template that you created and select an eligibility rule.

   Security: *Set Up: Scheduling: High Level Scheduling Settings* in the Workday Scheduling functional area.
4. Access one of these business processes and edit the business process definition:

   - Change Job
   - Hire
   - Request Return from Leave of Absence

   Security: *Business Process Administration* or *Manage: Business Process Definitions* domain in the System functional area.
5. Add the *Auto-Assign Scheduling Setting Overrides* service step after the *Completion* step.

Next Steps

Access the All Override Scheduling Settings Templates report to review your template configuration.

Related Information
Examples
Example Steps: Automatically Assign Scheduling Settings When Workers Change Jobs on page 2193

Steps: Mass Assign Scheduling Settings Overrides

Prerequisites

Security: *Set Up:Scheduling:High Level Scheduling Settings* domain.

Context

You can use the Mass Assign Scheduling Override Settings task to set up an automatic process that checks your high-level scheduling organizations and scheduling organizations for eligibility changes that will impact scheduling override settings. The process will then assign the appropriate settings based on your configuration. This reduces the need for you to manually update overrides when worker eligibility changes due to an expected event. Example: A worker transitions from being minor to an adult on their eighteenth birthday.

Steps

1. Access the Create Override Scheduling Settings Templates task.

   Create a new template with the validations, engine settings, and rules that you'd like to mass assign.

   Example: You create a template for workers under 18 years old that ensures they aren't scheduled for more than 20 hours for each week.

2. Access the Maintain Override Scheduling Settings Templates task. As you complete the task, consider:

Option	Description
Priority	Select the priority for which rule Workday evaluates first. If a worker is eligible for multiple templates, Workday assigns the highest priority template first.
Override Scheduling Settings Template	Select the template that you created.
Worker Eligibility	Select a condition rule or create a new scheduling eligibility rule. Example: You create an eligibility rule that captures workers whose age is less than 18 years.

3. Access the Mass Assign Scheduling Override Settings task.
4. From the Run Frequency prompt, select whether to initiate the settings override for workers now or at a later date.

   Example: You select Weekly to run the job on a weekly basis. If you have 3 eligibility rules for 3 settings templates, when the job runs, workers in the organizations are checked against those 3 rules. If a worker doesn't qualify for any, there will be no overrides. If a worker qualifies for rule 1, they'll be assigned template 1. When the job runs again next week, if the worker still qualifies for rule 1, no new overrides will be assigned and the current override template remains in place. If the job runs again in 10 weeks, and the worker is now over 18, and now qualifies for template 2, a new setting will be assigned with the effective date of the job run date, and a new override will be in place. The worker now has 2 snapshots total.
5. Select the Scheduling Organizations for which you want to override settings.

   When you select an organization, Workday checks eligibility for every scheduling worker in the organization.

   If you've selected Include Members of Subordinate Organizations on the Edit Scheduling Settings task for the HLSO, Workday also checks eligibility for workers in subordinate organizations. Likewise, Workday will only check the eligibility of the leader of the organization if you've enabled Include Leader as Part of Schedule.

   Workday then applies the highest priority override template that workers are eligible for based on the Maintain Override Scheduling Settings Templates task.
6. Enter the number of Days in the Future after which Workday runs the job.

   Each time the job runs, Workday checks worker eligibility for this number of days in the future. Example: You've set the job to run on May 1. You enter 30 for Days in the Future. Workday checks worker eligibility as of May 31.

Change a Worker's Availability

Context

You can modify the details of a worker's availability using the Change Worker Availability for Worker task. The Optimization Engine takes any changes submitted on this task into account when generating schedules.

Validations on this task alert schedulers when the availability time slots they enter cause a conflict with overlapping time slots. This means that Workday prevents you from submitting availability when you enter time slots that overlap within the same day.

Note:

The Change Worker Availability for Worker task enables you to configure availability for each day of the week. However, Workday Scheduling also takes into account shifts that:

- Cross over midnight into the next day.
- Cross schedule weeks.

Workday combines a worker's availability from consecutive days (Example: Monday 10PM to Tuesday 6AM) into a single time slot for scheduling purposes. This means that if a worker needs to be available for an overnight shift, it is recommended that you configure their availability across the two affected days. Example: 10PM to 00:00 AM on Monday and 12:00AM to 6:00AM on Tuesday.

Steps

1. Access the Change Worker Availability for Worker task and select a Worker.
2. Verify that the Effective As Of Date reflects the date that you want the changes to take effect.

   The default value is the current date.
3. Use the Start Time and End Time fields for each day to specify the worker's availability.

   You can enter multiple time slots for a single day.

   Note: The Available check box is selected by default to indicate that the worker is available all day. The values entered in the Start Time and End Time fields take precedence over the Available check box, even when the Available check box is selected.
4. Click Submit.

Example

This example illustrates a use case involving setting up a worker's availability when crossing midnight. In this example, the worker needs to be available from 10:00 PM on Monday until 4:00 AM on Tuesday.

The scheduler enters these values for Monday on the Change Worker Availability for Worker task:

Field	Value
Start Time	10:00 PM
End Time	12:00 AM

The scheduler also enters these values for Tuesday:

Field	Value
Start Time	12:00 AM
End Time	4:00 AM

This following example illustrates a use case involving split shifts for a worker who has a commitment every Wednesday between 12:00 PM and 6:00 PM. The worker is available on Wednesdays from 6:00 AM to 12:00 PM, and is available again later that day from 6:00 PM to 10:00 PM.

The scheduler enters these values in a row for Wednesday on the Change Worker Availability for Worker task:

Field	Value
Start Time	6:00 AM
End Time	12:00 PM

The scheduler adds another row for Wednesday with these values:

Field	Value
Start Time	6:00 PM
End Time	10:00 PM

Next Steps

Display Absence Details on Schedules

Prerequisites
Security:*Set Up: Scheduling: High Level Scheduling Settings*domain in the Scheduling functional area.

Context
Workday automatically displays absences with a general label of Time Off. If managers prefer not to see absences, they can use the Display Absences option on the Change View menu on schedules to completely hide all absences from the schedule.

You can control whether managers, or anyone else who has the ability to see schedules, can see these absence details on schedules:

- Name.
- Event status.
- Reasons.
- Time off comments.

Workday can display absence details for any of these configured absence types:

- Absence tables.
- Time offs.
- Leave types.

For leave types, Workday displays the name of the leave type rather than the leave family. You can see the leave family in a separate pop-up which appears when you click on the white absence card on the schedule.

Steps

1. Access the Edit Scheduling Settings task and select an effective-dated snapshot.
2. As you complete the Absence section on the Calendar tab, consider:

Option	Description
Display Details for All Absence Types	Workday displays the details of the absence type for all configured absence types in your tenant.
Display Details for Absence Types	Select specific absence types that you want to display on schedules. When you select this option workers who have access to view schedules will be able to see absence details on schedules, even if they're not secured to Absence Management tasks.
Don't Display Any Absence Type Details	Workday displays a time off block on the schedule, but doesn't display the details of the absence type.

Option	Description
	When you select this option workers who have access to view schedules will be able to see absence details on schedules, even if they're not secured to Absence Management tasks.

Example: You select Display Details for Absence Types and enter *Paid Time Off*.

Audrey has Paid Time Off on Monday and Sick Time on Tuesday. Workday displays absences for Audrey on both Monday and Tuesday. However, Workday only displays the Paid Time Off label and other details for Audrey's Monday time off. The manager can see that Audrey has an absence on Tuesday, but can't see what type of absence it is, or any additional details.

3. Save your changes.

Result

The configuration fields are effective-dated so you can add or remove absence types from your HLSO snapshots when needed. When you select specific Leave of Absence types to display in the Display Details for Absence Types field, Workday assesses whether to display the absence type based on these criteria:

- If the Actual Last Day of Leave is set, Workday checks the HLSO settings snapshot as of the First Day of Leave and the HLSO settings snapshot as of the Actual Last Day of Leave.
- If the Actual Last Day of Leave isn't set, Workday checks the HLSO settings snapshot as of the First Day of Leave and the HLSO settings snapshot as of the Estimated Last Day of Leave.

Example

On the 01/01/2023 HLSO snapshot, you've selected Display Details for All Absence Types. Audrey's Compassionate Leave begins on 11/20/2023 with an Estimated Last Day of Leave of 12/31/2023. Workday displays her leave as Compassionate Leave on the schedule.

Later, you decide you only want a few absence types to be displayed on the schedule. You create a new 11/27/2023 HLSO snapshot and in the Display Details for Absence Types field, you enter specific leave types that you want to display on the schedule. You do not add the Compassionate Leave leave type.

From 11/27/2023-12/31/2023, the schedule will no longer display Audrey's Compassionate Leave leave type because as of the estimated last day of her leave, the HLSO snapshot was configured to display only certain absence type details on the schedule.

Any Compassionate Leave leave type entered on or after 11/27/2023 will not be displayed as Compassionate Leave, but will display as a generic time off block on the schedule.

Next Steps

When you print a schedule, Workday hides the name and event status of the absence type and only displays the Time Off label on the schedule.

Related Information

Tasks

Steps: Set Up High-Level Scheduling Organizations on page 2154

Set Up Daily Notes

Prerequisites

Security: *Set Up: Scheduling: Daily Notes* domain in the Workday Scheduling functional area.

Context

You can create notes that Workday displays to managers on the weekly schedule view, to help make it easier to communicate updates directly within the schedule. Workday displays notes on the schedule beneath the date for each day of the week. Example: You create a note to remind managers of that week's sales target.

Steps

Access the Maintain Daily Notes for Scheduling Organizations task. As you complete the task, consider:

Option	Description
Scheduling Organizations	Select one or more scheduling organizations where the note will be displayed.
Start Date	Enter the date when Workday begins to display the note for managers.
End Date	Enter the date when Workday stops displaying the note for managers.
Title	The header of the note.
Description	The body of the note.

Next Steps

You can access the View Daily Notes for Scheduling Organizations report to view all daily notes by scheduling organization.

Example Steps: Automatically Assign Scheduling Settings When Workers Change Jobs

This example illustrates how to set up Workday Scheduling and HCM business processes to automatically assign Scheduling setting overrides to workers when they change jobs or return from a leave of absence.

Context

You want Workday to automatically update these Scheduling settings for workers when they transition from full time to part-time work in California:

- Workers should have at least 8 hours of rest time between scheduled shifts.
- Workers should work no more than 20 hours in a week.
- The Optimization Engine should heavily weight workers' preferred weekly hours when it generates schedules.

Steps

1. Access the Create Override Scheduling Settings Template task. Enter *CA < 20 hours/week* in the Description field.
2. On the Validations tab, enter these values:

Enabled	Validation Type	Validation Value	Additional Hours Configuration	Severity Level	Error Message	Validation Usage Type
True	Minimum Rest Between	8	N/A	Critical	Provide a break of at least 8 hours	UI and Solver

Enabled	Validation Type	Validation Value	Additional Hours Configuration	Severity Level	Error Message	Validation Usage Type
	Shifts (Hours)				between shifts.	
False	Minimum Weekly Hours	Leave blank.	N/A	N/A	N/A	N/A
True	Maximum Weekly Hours	20	Leave blank.	Critical	Schedule the worker for no more than 20 hours in a week.	UI and Solver

3. On the Scheduling Engine Settings tab, select the Enable check box for Preferred Weekly Hours and enter *100* in the field.
4. Click OK and Done.
5. Create a *CA < 20 hours/week* scheduling eligibility rule that includes workers in California with 20 or fewer scheduled weekly hours.

   See:Create Scheduling Eligibility Rules on page 2171.
6. Access the Maintain Override Scheduling Settings Templates task. Enter these values:

Field	Value
Priority	*1*
Override Scheduling Settings Template	*CA < 20 hours/week*
Eligibility	*CA < 20 hours/week*

7. Edit the Change Job business process definition and add a new row with these values:

Order	Type	Specify
Place this step after the completion step.	Service	Auto-Assign Scheduling Setting Overrides

8. Access the All Override Scheduling Settings Templates report to review your template configuration.

Related Information

Concepts

Concept: Override Scheduling Settings on page 2196

Tasks

Steps: Automatically Assign Scheduling Settings to Workers on page 2187

Concept: Mass Edit Shifts

Mass Edits

You can configure the *Mass Change Shifts Event* business process (secured to the Workday Scheduling functional area) so that managers can mass edit, copy, or delete shifts in a series directly from a single shift in the schedule.

Note: This functionality is separate to the bulk shift editing described in Concept: Bulk Edit Shifts, which handles editing of multiple shifts for several workers on 1 schedule at once. The *Mass Change Shifts Event* business process only applies to editing 1 shift that is assigned to 1 worker over several future schedules at once.

When a manager edits a shift that shares the same shift details as future shifts, you can view and edit those future shifts (up to 6 months from the current shift) at once. In order to edit the future shifts, the shifts must have these details in common:

- Day of the week.
- Start time.
- End time.
- Subgroup organization.
- Schedule tags.

You can choose whether to apply edits to all future shifts, or you can select individual shifts where you'd like to apply changes.

Limitations

If there's a schedule that is in In Review status, shifts on that schedule can't be mass edited or mass copied. Those shifts on the In Review schedule will also not be returned as shifts that a mass edit from a different week can be applied to.

If there is a shift in Pending status, it can't be mass edited or mass copied, and also won't be returned as a shift that a mass edit from a different week can be applied to.

The mass edit and mass copy functionality currently doesn't respect predictive scheduling rules that you configure.

Business Process Approvals

If you configure business process approvals on the *Change Published Schedule* business process, each mass edit triggers a single approval event, even when you edit multiple shifts. The *Change Published Schedule* business process only applies to changes you make to the original shift (the shift in the current week). To trigger business process approvals for edits to shifts in future weeks, configure an approval step on the *Mass Change Shifts Event* business process. If you configure both, there will be 2 separate approval events in the Inbox–-one to approve the current shift (*Change Published Schedule* business process) and another to approve the future shifts (*Mass Change Shifts Event* business process).

Note: There will only be an approval required if you're editing a published shift. If the shift isn't published, it won't go through a business process.

You can configure these allowed actions so that workers are required to either approve or deny shift changes:

- *Acknowledge Mass Change Shifts* on the *Mass Change Shifts Event* business process.
- *Acknowledge Change Published Schedule* on the *Change After Publish* business process.

When you configure these steps, workers can accept the shift change when they can work the shift, or deny the shift change if they can't work the shift. If you configure both allowed actions, workers will receive 2 separate notifications.

Business Process Step Conditions

If the original shift is in Draft status, Workday automatically updates it without processing it through a business process.

If the original shift is in Published status, it will go through the *Change Published Schedule* business process. If a step condition exists on the *Change Published Schedule* business process and the current shift you're editing violates the step condition, Workday will not allow you to update the current shift or future shifts that are part of the mass edit.

Workday puts the current shift that you attempted to edit or copy into a Changes Needed status to indicate that you need to fix the shifts so that the shifts meet the step condition requirements before edits can be applied.

If you were attempting a mass delete, Workday puts the current shift into a Pending Delete status. Future shifts that you attempted to delete will not have a status change, though. Managers won't be able to edit a shift in the Pending Delete status.

Note: If you make a mass edit where the current shift you're editing is a Draft shift, Workday does not check the Change Published Schedule business process for a step condition. Workday allows the changes to be made for the current shift and future shifts, even if the future shifts are in a published status. This means that future published shifts could potentially be updated in error.

Workday then processes future shifts (those you edited or copied) through the *Mass Change Shifts Event* business process.

Concept: Override Scheduling Settings

You can override schedule settings, validations, and rules so that workers have custom settings based on your override rather than inheriting settings from their high-level scheduling organization (HLSO). The validations you configure for HLSOs determine the length and placement of shifts that the Optimization Engine creates. Overrides determine which workers are assigned to those shifts.

Example: You want to ensure that full-time workers are assigned 8-hour shifts and part-time workers are assigned 4-hour shifts. You configure the HLSO so that the maximum shift length is 8 hours and the minimum shift length is 4 hours. You create an override for part-time workers that defines the maximum shift length as 4 hours and the minimum shift length as 4 hours. You also create an override for full-time workers that defines the maximum shift length as 8 hours and the minimum shift length as 8 hours.

You can override these validations:

- Maximum Shift Length (Hours)
- Maximum Weekly Hours
- Maximum Working Days
- Minimum Rest Between Shifts (Hours)
- Minimum Shift Length (Hours)
- Minimum Weekly Hours

You can also override these Optimization Engine settings:

- Consistency
- Consistency Lookback Cycle
- Labor Cost Minimization
- Preferred Weekly Hours
- Preferred Schedule Tags
- Preferred Work Times

You can also override meal and break rules so that schedules for individual workers comply with school calendar regulations.

You can use the Override Scheduling Settings for Worker task to override settings for an individual worker. For overrides to take effect in a scheduling week, they must be effective dated as of the start of that week, or earlier. If an effective-dated override snapshot is dated after the start day of the schedule week, the override will take effect the next week.

Note: To use this feature, you must create a blank template so that Workday can insert an empty row when a worker isn't eligible for any rules. The worker's settings use the HLSO configuration when the new override snapshot is created.

You can override settings automatically when workers transition jobs or have other events. Create override templates using the Create Override Scheduling Settings Template task. Then add the Auto-Assign Scheduling Setting Overrides service step after the *Completion* step on these business processes:

- *Change Job*
- *Hire*
- *Request Return from Leave of Absence*

Concept: Mass Add Shifts

The Mass Add Shifts feature enables scheduling managers to mass add up to 300 shifts at once.

Mass added shifts are always created in draft status. If you mass add shifts on a published schedule, you need to save the shifts in the Mass Add Shifts modal before publishing them. You can assign the shifts to multiple workers, with the option to also create a specific number of unassigned shifts.

Note: Workday validates data when you add 1 worker in the Workers field. For performance reasons, Workday doesn't validate data when you add more than 1 worker.

You can access the Mass Add Shifts feature from the Actions menu in Day or Week view, or by clicking any day of the week on an unassigned row or blank space on a worker row.

Option	Description
Time	Enter shift start and end times that do not exceed the maximum shift length defined for the HLSO.
Post to Open Shift Board	Select if you want to post these shifts in Open status to the Open Shift Board so that workers can bid on them. This applies for both assigned and unassigned shifts.
Add Worker	Click to access the Worker Search modal where you can: • Search for a specific worker. • Select Suggested Workers from the Workers prompt to view a list of workers based on their availability, schedule tags, and cost. • Select All Workers from the Workers prompt to view all available workers and filter by schedule tags.
Quantity of Unassigned Shifts	Enter the quantity of unassigned shifts that you want to create. Note: The combination of this value and the quantity of assigned shifts can’t exceed 300 shifts in total. Example: If there are 200 assigned shifts, then the maximum allowed quantity of unassigned shifts is 100.
Shift Notes	Enter a note to append to the shift details.
Add Meal or Break	Create meals and/or breaks for the shifts that don’t break the meal break rule set defined for the HLSO.

Concept: Bulk Edit Shifts

The Edit Shifts functionality enables scheduling managers to edit and/or delete up to 350 shifts on a draft or published schedule at once.

Note: This functionality is separate to the *Mass Change Shifts Event* business process described in Concept: Mass Edit Shifts, which allows you to edit 1 shift that is assigned to 1 worker over several future schedules at once. This bulk editing shifts functionality enables you to edit multiple shifts for several workers on 1 schedule at once.

You can access the Edit Shifts feature from the Actions menu on a schedule. You can use the filters to narrow the list of shifts, before selecting the shifts on your schedule that you want to mass edit or delete.

Scheduling managers can edit several aspects of the selected shifts in one action:

- Date
- Time
- Post to Open Shift Board
- Subgroup Organization
- Schedule Tags
- Assigned Worker or Unassign Shifts
- Shift Notes

When you want to edit shifts that cross over midnight into the following day, enter the shift start date in the Shift Date filter, or filter by shift start and end times. If you want to edit shifts that cross over midnight into the following week, (Example: A shift begins on Saturday and ends on Sunday, with Sunday being the first day of a new weekly schedule), filter by shift start and end times.

Note: When you select the Shift Notes check box in the Edit Shifts window without changing the field values, Workday deletes any existing shift notes when you save your shift edits when you save your shift edits.

Reference: Scheduling Keyboard Shortcuts

Navigating the Schedule

Windows

Keyboard Shortcut	Description
• Ctrl + Down arrow • End key	Moves the cursor to the bottom of the schedule.
• Ctrl + Up arrow • Home key	Moves the cursor to the top of the schedule.
Ctrl + F key	Opens the Schedule Search and Quick Navigation modal.
Ctrl + R key	Refreshes the web browser page.

Mac

Keyboard Shortcut	Description
• Command + Down arrow • Function (fn) + Right arrow	Moves the cursor to the bottom of the schedule.
• Command + Up arrow • Function (fn) + Left arrow	Moves the cursor to the top of the schedule.

Keyboard Shortcut	Description
Command + F key	Opens the Schedule Search and Quick Navigation modal.
Command + R key	Refreshes the web browser page.

Adding and Editing Shifts

Windows and Mac

Keyboard Shortcut	Description
In the Time field. Time + Tab key Examples: • 7a + Tab: 7AM • 7p + Tab: 7PM • 7 to 11 + Tab: 7AM to 11AM • 12 to 6 + Tab: 12PM to 6PM • 14 + Tab: 14:00	Inserts time in the Time field.
Escape (esc)	Closes the selected field or shift modal.

Reference: Scheduling Business Processes

Worker Data Business Processes

Schedule Maintenance Business Processes

Workday delivers these business processes in the Scheduling functional area.

Business Process	Description
Change Worker Schedule Tags	Initiates when you use the Assign Schedule Tags to Worker task. You can also initiate this business process through the Auto-Assign Schedule Tags service step. Add this step to these business processes to automatically assign schedule tags to workers when they have a job or competency change: • *Add Additional Job* • *Change Job* • *Change Organization Assignments for Worker* • *Contract Contingent Worker* • *Hire* • *Manage Certifications*
Override Scheduling Settings for Worker	Enables managers to override scheduling engine settings, some validations, and rules for a worker, if they need personalized settings that differ from their high-level scheduling organization.

Business Process	Description
Change Schedule Preferences	Enables workers to update their schedule preferences using the Change My Schedule Preferences task to update preferences including: • Preferred weekly hours. • Preferred days. • Preferred time slots on specific days. This business process enables managers to know what schedules work best for employee's personal lives. You can configure whether a worker must receive approval to change their preferences. Enables managers to access the Change Schedule Preferences for Worker task.
Change Work Availability	Enables workers to change their work availability when they need to request a change to their working hours due to personal circumstances. They can use the Change My Work Availability task. You can configure whether a worker must receive approval to change their availability. Enables managers to access the Change Work Availability for Worker task.

Business Process	Description
Change Published Schedule	Enables managers to shift schedules if workers have urgent requests, or to meet different business needs. Managers can make edits to a published schedule and publish those shift changes individually using the Publish button on the Edit Shift Details modal. Also enables managers to publish a new or updated shift (assigned or unassigned) to the Open Shift Board in an Open status.
Bulk Change Published Schedule for Worker Event	Enables managers to make multiple draft changes to a published schedule, and then to publish the schedule with all of the changes at once using the Publish button on the schedule. You can add the Notify Workers of a Change to Bulk Publish Schedule Event service step to notify workers of any changes to their schedule. Note: Workers will only receive a notification when you've configured the Maintain Change Published Schedule Notifications task and selected fields that trigger notification
Mass Change Shifts Event	Enables managers to mass edit or mass copy shifts in a series directly from a single shift. To edit the future shifts, the shifts must have these details in common:

Business Process	Description
	• Day of the week. • Start time. • End time. • Subgroup organization. • Schedule tags. Note: If you configure approvals on the *Change Published Schedule* business process, each mass edit initiates only 1 approval event even when you edit multiple shifts. You can't mass edit shifts that have in-progress changes or are in Draft status.
Cover Shift	Enables workers to: • Request to cover an open shift. • Withdraw a pending request to cover an open shift. Enables managers to view validations and information about the updated shift in an approval action in My Tasks.
Cover Shift Bidding Event	Enable workers to bid on shifts from theOpen Shift Boardand enable managers to decide which worker to select to cover the shift. Configure the*Bid to Cover Shift*initiating action and the*Select Worker to Cover Shift*allowed action to use this feature.
Open Shift	Enables workers to offer assigned shifts to other workers by placing them on the Open Shift Board. Enables managers to place unassigned shifts directly on the board. You can configure whether a worker must receive approval to post their shift on the board.
Publish Schedule	Enables managers to publish a schedule once they've finalized hours for the week. Then workers can view and take action on the schedule. Also enables managers to publish assigned or unassigned shifts to the Open Shift Board in an Open status.
Request Shift Swap *Accept Shift Swap*	Enables workers to: • Swap shifts with other workers within their scheduling organization. • Accept or deny a proposed shift swap.
Take Back Shift	Enables workers to withdraw in-progress *Open Shift* and *Cover Shift* events.

Reference: Shift Statuses

Shift Statuses

Shift Status	Description	Where to View
Action Required	A worker's published shift has been updated and is waiting for approval from the worker.	• Shift view (ESS). • My Schedule report (ESS).
Changes Needed	A shift change has failed to meet a step condition on the Change Published Schedule or the Bulk Change Published Schedule Event business process. Example: The business process initiation step has a condition rule that requires a comment when a manager makes changes to a published schedule. The manager didn't provide a comment with their change, so the shift status is Changes Needed.	Weekly schedule view (MSS).
Changes Pending	An existing published shift has been updated and is pending approval.	Weekly schedule view (MSS).
Cover Pending	A worker has requested to cover a published shift and the request is pending approval.	• Weekly schedule view (MSS). • Shift view (ESS). • My Schedule report (ESS). • Open Shift Board (MSS and ESS).
Delete Pending	An existing published shift has been deleted and is pending approval.	Weekly schedule view (MSS).
Draft	A shift that hasn't yet been published or has been published but is undergoing additional edits.	Weekly schedule view (MSS).
New Shift Pending	A new shift has been added to a published schedule and is pending approval.	Weekly schedule view (MSS).
Open Pending	A worker has requested to open a published shift and the request is pending approval.	• Weekly schedule view (MSS). • Shift view (ESS). • My Schedule report (ESS).
Open Shift	A published shift (assigned or unassigned) that is available for	• Weekly schedule view (MSS). • Shift view (ESS).

Shift Status	Description	Where to View
	a worker to request to cover on the open shift board.	• My Schedule report (ESS). • Open Shift Board (MSS and ESS)
Pending Delete	An attempt to delete a shift has failed to meet a step condition on the Change Published Schedule or Bulk Change Published Schedule Events business process. Example: The business process requires a comment when a manager deletes a published shift. The manager didn't provide a comment, so the shift status is Pending Delete.	Weekly schedule view (MSS).
Published	A shift that is assigned to a worker and published to the schedule.	• Weekly schedule view (MSS). • Shift view (ESS). • My Schedule report (ESS). • Open Shift Board (MSS and ESS)
Swap Pending	A worker has requested to swap a shift with another worker, and the request is pending approval.	• Weekly schedule view (MSS). • Shift view (ESS). • My Schedule report (ESS).
Take Back Pending	A worker has requested to take back a published shift, and the request is pending approval.	• Weekly schedule view (MSS). • Shift view (ESS). • My Schedule report (ESS). • Open Shift Board (MSS and ESS).

Schedule Tags

Steps: Assign Schedule Tags

Prerequisites

Security: *Set Up: Scheduling: High Level Scheduling Settings* domain in the Scheduling functional area.

Context

In order for workers to be included in a schedule, they must be assigned at least 1 schedule tag. A worker's schedule tag assignment determines:

- The shifts workers are qualified to work.
- The shifts workers are eligible to swap or open from the My Schedule task.

- The shifts workers can cover on the Open Shift Board.
- The area where Workday displays workers in the schedule.

You can assign schedule tags to workers by:

- Manually assigning them using the Assign Schedule Tags to Worker task.
- Automatically assigning them as part of the Auto-Assign Schedule Tags service step.

You can also add the Auto-Assign Schedule Tags service step to these business processes:

- *Add Additional Job*
- *Change Job*
- *Change Organization Assignments for Worker*
- *Contract Contingent Worker*
- *Hire*
- *Manage Certifications*

When a worker has a job change, Workday suggests new schedule tags to assign to the worker through a notification to their manager.

The service step evaluates scheduling eligibility rules on the worker's high-level scheduling organization. Workday determines whether to add new tag assignments to the worker based on the worker data that Workday updates during the staffing transaction.

Steps

1. Create Scheduling Eligibility Rules on page 2171.
2. Access the Edit Scheduling Settings task to associate eligibility rules with schedule tags.
3. On the Tags tab, in the Schedule Tags grid, click the Values button for a schedule tag.
4. In the Worker Eligibility column, select a scheduling eligibility rule.
5. Configure Scheduling business processes to automatically assign schedule tags to workers.

   See: Reference: Scheduling Business Processes on page 2199
6. Access the Assign Schedule Tags to Worker task to assign schedule tags to workers individually.

Example

To identify workers who belong to the Clerk job profile, you create an eligibility rule. Then you apply the eligibility rule to the Clerk schedule tag.

You enter these values on the Create Scheduling Eligibility Rule task:

Field	Value
Description	*Job Profile = Clerk*
And/Or	*And*
Source External Field or Condition Rule	*Job Profile*
Relational Operator	*any in the selection list*
Comparison Type	*Value specified in this filter*
Comparison Value	*Clerk*

You access the Edit Scheduling Settings task. On the Tags tab, enter these values:

Field	Value
Enabled	*Select the check box.*

Field	Value
Name	*Job*
Required	*Select the check box.*

Select the Values button. Enter these values:

Field	Value
Active	*Select the check box.*
Name	*Clerk*
Worker Eligibility	*Job Profile = Clerk*

Create Schedule Tags

Prerequisites

Security: *Set Up: Scheduling: Maintain Scheduling Organizations* domain in the Scheduling functional area.

Context

You can define schedule tag types that apply to workers and schedule blocks. Schedule tag types can represent worker qualifications, roles, locations, or other relevant categories of information. Once you create schedule tag types, you can also create the schedule tag values that belong to each type. Example: You create a *Role* schedule tag type. You then create these schedule tag values: *Cashier*, *Stock Associate*, *Security*. Or you create a *Location* schedule tag type. You then create these schedule tag values: *Mumbai*, *London*, *San Francisco*.

Schedule tags determine:

- How Workday groups and displays shifts on the schedule.
- The roles that are available when you define labor demand for a schedule.
- Whether workers are qualified to work shifts.

You can assign workers to 1 or more schedule tag types and associated values. You can't schedule workers until they've been assigned a schedule tag value.

You can configure schedule tags for 1 high-level scheduling organization (HLSO) and configure lower HLSOs to inherit the schedule tags and values from the HLSO above them in the organization hierarchy.

You can create up to 3 schedule tag types in your tenant, and an unlimited number of schedule tag values. Schedule tag settings aren’t effective-dated. Changes you make will update all schedules in the past and the future.

Steps

1. Access the Edit Scheduling Settings task.
2. Click the Tags tab. As you complete the Schedule Tags grid, consider:

Option	Description
Enabled	Enables the schedule tag for the HLSO and all subordinate scheduling organizations.
Inherit	Select to inherit the tag settings from a higher-level HLSO rather than configuring them for the current one. This enables you to share schedule tag values across multiple HLSOs.

Option	Description
	When you select the Inherit check box, Workday automatically populates the row with the inherited schedule tag from the higher-level HLSO and prevents you from editing it. You can't remove inherited tag values from a lower HLSO, but you can add new tag values.
Name	The name of the schedule tag that displays on labor demand and shift details. Examples: *Role*.

3. Click the Values button to add values for a schedule tag. Example: *Cashier, Stock Associate, Security*.

   As you complete the modal, consider:

Option	Description
Active	Makes the value available for workers to select.
Name	Enter a name. This name is visible to workers.
Worker Eligibility	Select an existing scheduling eligibility rule or create a new one. See: • Steps: Assign Schedule Tags on page 2203 • Create Scheduling Eligibility Rules on page 2171

4. In the Tag Values from Superior Organizations grid, view the values that the organization inherits from a superior HLSO.

   To edit these values, you must make changes to the superior HLSO.

Next Steps

Before scheduling workers, you can check that they have the appropriate schedule tag value assigned by running the View Schedule Tags by Organization report. Running the report will help you ensure that new hires or workers who changed jobs are assigned the correct tags.

Shift Swapping and Bidding

Steps: Set Up Open Shift Bidding

Prerequisites

Context

You can enable workers to bid on shifts on the Open Shift Board, then managers can select which worker receives the shift based on criteria that meets your business requirements, such as distributing shifts by seniority. This gives workers more control over their schedules, and helps managers distribute shifts in a more fair way.

When workers bid on shifts, Workday:

- Sends a notification to the manager's My Tasks with details about the shift bids. The manager can then select an active bid to give the shift to the requesting worker.

- Includes details about worker seniority in the manager notification so that the manager can make an informed decision when selecting a worker for the shift.

Steps

1. Access the Create Business Process Definition task.

   Select the Cover Shift Bidding Event business process to create the default definition.

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
2. Configure the *Cover Shift Bidding Event*business process.
   a) Add Bid to Cover Shift as the initiating action.
   b) Add Select Worker to Cover Shift as an allowed action.

   See: ../../../authentication-and-security/configurable-security/security-policies/dan1370796362110.dita.
3. Access the Edit Scheduling Settings task for the high-level scheduling organization for which you'd like to enable shift bidding.

   On the Worker Experience tab, select Enable Shift Bidding.

   Security: *Set Up: Scheduling: High Level Scheduling Settings*domain.

Result

Workday displays a Bid to Cover Shift option on shifts on the Open Shift Board when shifts are in *Open* or *Bidding Pending*status. Workday only displays the option if the worker is eligible to work the shift.

Managers can’t edit shifts once bidding has started.

Concept: Open Shift Board

You can enable workers to offer their assigned shifts to other workers by placing them on the Open Shift Board. Managers can also place unassigned or assigned shifts directly on the board. Once a shift is on the board, other qualified workers can view the open shifts and request to cover them. Workers can request to cover shifts across different organizations and locations. The board only displays open shifts to a worker when:

- The worker is assigned the schedule tags on the open shift.
- The open shifts are in a scheduling organization that rolls up to the worker's nearest high-level scheduling organization.
- The open shift isn't in the past.

You can configure whether a worker must receive approval to post their shift on the board, to cover a shift from the board, or both. When managers review a request to cover a shift through My Tasks, Workday displays validations indicating whether the worker opening or covering a shift will violate configured business rules. Example: A worker will exceed the maximum weekly hours threshold.

Note: If a worker posts a shift to the open shift board but no one covers the shift, the worker is still responsible to work the shift.

You can create a custom report to report on shifts with an Open Shift status to find unassigned shifts that you might need to manually assign.

Business Processes

Configure these business processes to use the Open Shift Board:

Business Process	Description
Open Shift	Enables workers to open their own shift and place it on the open shift board.
Take Back Shift	Enables workers to take back a shift they previously posted on the open shift board when it hasn't been covered by another worker.
Cover Shift	Enables workers to: • Request to cover an open shift. • Withdraw a pending request to cover an open shift. Enables managers to view validations and information about the updated shift in an approval action in My Tasks.
Publish Schedule	Enables managers and admins to publish an assigned or unassigned shift to the open shift board in an *Open* status.
Change Published Schedule	Enables managers and admins to publish a new or updated shift (assigned or unassigned) to the open shift board in an *Open* status.

Concept: Swap Shifts

You can enable workers to swap shifts with other workers within their scheduling organization, helping them to have more control over their schedules and balance their work/life priorities.

When workers swap shifts, they can:

- Search for other workers in their scheduling organization who meet the qualifications for a shift swap based on their schedule tag assignment, availability, and scheduling organization membership.
- View other workers' upcoming published shifts that the initiating worker is qualified to work.
- Search and filter for shifts by date, time, and schedule tag.

Unlike the Open Shift Board where workers can look for available shifts to cover, the Swap Shift functionality requires workers to initiate a direct shift swap between themselves and one of their coworkers.

After a worker selects a shift to swap and submits their request, the shift is in a *Swap Pending* status. After a worker accepts a shift swap request, their manager receives a notification that displays the details for both swapped shifts.

When workers access the My Schedule task and view Shift Details for a shift, then click the Manage Shift button, they see a Swap Shift option.

Business Processes

You can configure these business processes to use the Swap Shift functionality:

Business Process	Description
Accept Shift Swap	Enables workers to accept or reject a shift swap request. When a worker accepts a shift swap request, Workday automatically reassigns the shift to the worker.
Request Shift Swap	Enables workers to select another worker with whom they'd like to swap shifts.

Business Process	Description
	You can add the Notify All Impacted Workers of Shift Swap service step to the business process after the completion step. The service step notifies both workers that the shift swap was successful.

Example: Request Shift Swap Business Process Configuration

Order	Type	Specify	Optional	Group	Complete
a	Initiation		No		
b	Action	Accept Shift Swap	No	Employee as Self	
c	Approval		No	Manager	Yes
d	Service	Notify All Impacted Workers of Shift Swap	No		

How Workers Can Swap and Accept Shifts

To request a shift swap, a worker can:

1. Access the My Schedule report.
2. Select they shift they wish to swap.
3. Select Swap Shift.
4. Select a worker from the prompt to swap with. Only workers assigned the corresponding schedule tag will display in the prompt.
5. Select Submit.

To accept a shift swap, a worker can:

1. Access My Tasks.
2. Select the Swap Shift Request item.
3. Select Approve.

The shift appears on the new worker's schedule and is removed from the original worker's schedule.

To cancel a request, select Business Process > Cancel from the related actions menu of the in-progress business process.

Reporting

Concept: Audit Schedules and Shifts

You can use the Schedule and Shift Audit report (secured to the *Scheduling: Schedule and Shift Audit* security domain) to view schedule changes and shift changes by scheduling organizations over a period of time. The report displays:

- Individual shift and schedule changes.
- When the shift or schedule change occurred.
- The worker who made the changes.
- An Additional Details prompt, which optionally displays more info about the worker that each shift belongs to.

When you use the report, if you delete a draft shift or clear a draft schedule, Workday completely deletes the shift or schedule, so there is no audit trail. If you delete a published shift or rescind a published schedule, you can audit those changes using the report.

Note: Workday updates the Created By field when the event is approved. When a shift change event needs to be submitted or approved, Workday won't update the field to Manual until the event is complete.

Concept: Good Faith Estimate Reporting

You can use the Good Faith Estimate report (secured to the Reports: Scheduling Worker Configuration domain) to view workers and their schedule preferences, availability, and whether they're on-call or on the voluntary standby list. You can then provide this report to workers to give them an estimate of their work schedule to help them predict their pay and to comply with local ordinances and regulations.

Managers and workers can update their on-call availability and opt-in to the voluntary standby list using these tasks:

- Change My Schedule Preferences
- Change Schedule Preferences for Worker

To set up your tenant for this type of reporting, you can enable one or both of these options on the Worker tab of the Edit Scheduling Settings task:

- Allow Workers to Be On Call
- Enable Voluntary Standby List

You can share the report with workers by updating these business processes with a report step that generates a PDF and sends it to the worker:

- *Change Job*
- *Hire*

To ensure that the report contains data, the *Change My Schedule Preferences* or *Change Schedule Preferences for Worker* steps must be an earlier step in the business process than the document generation step.

Reference: Scheduling Reports

Workday delivers a number of standard reports to give you greater insight into your Workday Scheduling data and configuration. For a complete, descriptive list of Workday delivered standard reports for Workday Scheduling, access the Workday Standard Reports report and select the *Scheduling* report category.

Report	Description	Security
Good Faith Estimate	View workers and their schedule preferences, availability, and whether they've indicated they're available on-call or have opted in to the voluntary standby list.	*Reports: Scheduling Worker Configuration*
View Schedule Shift Details by Organization	Displays shift details with a date range for one or more scheduling organizations.	*Reports: Schedule Shift Details*
View Scheduling Organizations	Displays all organizations in your tenant. You can sort based on the supervisory or custom organizations that you've enabled as high-level scheduling organizations	*Set Up: Scheduling: Maintain Scheduling Organizations*

Report	Description	Security
	(HLSOs) or scheduling organizations (SOs).	
View Scheduling Settings	Displays configuration settings for each HLSO. You can select the effective-dated snapshot you'd like to view.	*Set Up: Scheduling: Maintain Scheduling Organizations*
View Worker Schedule Tag by Organization	Displays workers, their positions, scheduling organization assignment, and schedule tag assignments.	*Reports: Scheduling Worker Configuration*
View Worker Scheduling Availability	Displays the days and times when workers are available to work.	*Reports: Scheduling Worker Configuration*
View Worker Scheduling Engine Settings	Displays workers' Scheduling Engine settings. When the worker has an override, the report displays the effective date of the override and the details of the override.	*Reports: Scheduling Worker Configuration*
View Worker Scheduling Preferences	Displays workers' preferred weekly hours and top 2 preferred schedule tag values.	*Reports: Scheduling Worker Configuration*
View Worker Scheduling Settings	Displays workers' scheduling validations. When the worker has an override, the report displays the effective date of the override and the details of the override.	*Reports: Scheduling Worker Configuration*

Troubleshooting

Troubleshooting: Workday Scheduling

Labor demand coverage is too low or Workday didn't create any shifts to fill labor demand.

Solution:

- Confirm that there are available workers with the right qualifications to cover all schedule tags and hours you've specified in labor demand.
- Ensure that labor demand can be met without violating maximum shift lengths.
- Decrease the cost minimization slider (if the cost isn’t too high).
- Make Maximum Weekly Hours relaxable and set the corresponding slider to a low position.
- Make Minimum Weekly Rest Days relaxable and set the corresponding slider to a low position.
- Decrease Consistency slider so the Optimization Engine can better accommodate the labor demand.
- Decrease one or more of the worker preferences sliders.

Worker preferences aren't being adequately met.

Solution:

- Increase Worker Preferences slider.
- Decrease cost minimization slider.

I can see that there's a worker available to cover a gap in the schedule. Why isn't the Optimization Engine generating a shift?

Solution:

- Double check that the worker is available.
- Verify that the worker has no time off or leave of absence overlapping with the shift.
- Verify that the worker doesn't have any overlapping shifts in another subgroup organization or tag set.
- Verify that the worker has the required schedule tags.
- Verify that the worker isn't at or near their maximum weekly hours constraint.
- Verify that giving the worker a shift won't violate maximum working days constraint.
- If preferences are set high, and giving the worker another shift violates those preferences, adjust down the preferences sliders.

Workers don't have minimum weekly hours.

Solution:

- Check that the workers have availability to meet minimum weekly hours without violating minimum shift lengths.
- Check if there are enough labor demand hours to cover the minimum hours of all workers in the scheduling organization.
- Decrease cost minimization slider.

Workday displays this Optimization Engine error: Unable to generate schedule.

Solution:

- When the Optimization Engine can't generate a schedule, it's usually because of a timeout. Try adjusting some of the slider weightings and regenerating the schedule.

Workday doesn't display a scheduling organization on the Scheduling Organizations list on the Schedule Workers report.

Solution:

- Ensure that the scheduling organization either:
    - Rolls up to an active high-level scheduling organization (HLSO).
    - Is itself an active HLSO.
- Ensure that the scheduling organization has at least 1 schedule tag type configured.

Schedules have disappeared for scheduling organizations.

Cause: When you make changes to a supervisory organization's hierarchy, location, or time zone, it's possible that those changes could impact schedules that Workday has already created.

Solution: When you make changes to supervisory organizations that are enabled for Scheduling, make sure that you use an effective date for those changes that doesn't already have schedules created.

Managers can't see their own shifts on the schedule.

Solution: Ensure that the mangers' security group is added to the *Self-Service: View Schedule* security domain.

Troubleshooting: Scheduling After Organization Changes

These are common issues that occur in Workday Scheduling when a team is restructured or an organization is reorganized.

Schedules disappear during reorganization.

Cause:

When you begin a reorganization, the scheduling department may transition to operate under a different high-level scheduling organization (HLSO). When the new HLSO has different configuration settings, schedules may disappear.

Solution: Access the Edit Scheduling Settings task. Ensure these 4 settings from the previous HLSO match the settings on the new HLSO:

- 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.

If you need to change these settings for the new HLSO, you can either:

- Access the Edit Scheduling Settings task for the new HLSO and create a new snapshot effective dated after the last existing schedule. You can then update the settings on the snapshot.
- Clear the schedules associated with the previous HLSO settings and recreate them using the new HLSO settings. This applies whether the scheduling organization becomes its own HLSO, a new HLSO is introduced between the old and current HLSO, or if the scheduling organization now reports to a new HLSO.

When enabling a new high-level scheduling organization (HLSO) at the existing scheduling organization (SO) level or above the SO, configuration options are locked on the Edit Scheduling Settings task.

Cause:

Some HLSO configuration settings are crucial for Workday to generate and display schedules. Workday prevents you from editing these settings in order to maintain data integrity when there are existing schedules for the HLSO.

Solution: During the initial snapshot setup for new HLSOs, Workday temporarily unlocks these four configuration options. It is essential to ensure that these settings align with those used in previous schedules:

- 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.

Following the initial snapshot, if you identify errors in your configuration, you can use the Settings tab on the Cleanup Invalid Scheduling Data task to update these settings.

Note:

Removing subgroup organizations or changing the Start Day of Week using this task could make schedules disappear due to the reasons we've listed in the first troubleshooting issue. Workday recommends exercising extra caution and double-checking your configuration when using this task.

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.
- Configure Absence business processes so that editable documents are dynamically generated when workers access tasks that initiate the configured business processes, such as Request Time Off or Request Leave of Absence.

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.

Question	Considerations
	You can create scheduled distributions that send email and mobile push notifications to: • 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:

Question	Considerations
	• Stop paying workers while on leave. • 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 2243.

- 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.

Recommendations for Deployments in the UK

When deploying Absence in the UK, consider whether Workday Payroll is in scope, a future consideration, or not at all. When interacting with Payroll, your time off configurations can impact your end results. Refer to these sample configurations from the Workday foundry tenant, wdsetup when setting up your time off configuration:

Absence Type	Configuration in wdsetup	If Workday Payroll Is in Scope	If Third-Party Payroll Is in Scope	Additional Information
GBR Annual Leave / Holiday	Time off	Time off with absence occurrences.	Time off	If Workday Payroll is in scope and using UK Statutory Holiday Pay, you must configure absence occurrences to support the payroll functionality. Configure absence occurrences for holiday pay absence types separately. It's important to keep them distinct as changes can impact payroll.
GBR Compassionate Leave	Time off	Time off	Time off	
GBR Jury Duty	Time off	Time off	Time off	
GBR Sick Leave Unpaid/ SSP	Time off	Time off	Time off	Only for Statutory Sick Pay (SSP)
GBR Sick Leave	Absence Table with 100%, 50%, and 0% pay time off tiers.	Time off	Time off	Only for Company Sick Pay (CPS). To ensure that the absence tiers take effect, there's an initial accrual that continues to roll over year to year, from the date the time off request is taken from the balance. It's important that you enable revaluation on the absence table so that Workday considers any corrections or updates to the accrual or balance for the rolling accrual. Workday needs to account for the rolling accrual when loading history, payments against payroll and work schedule changes. Workday doesn't apply work schedule change adjustments (such

Absence Type	Configuration in wdsetup	If Workday Payroll Is in Scope	If Third-Party Payroll Is in Scope	Additional Information
				as FTE) to the rolling dates that apply a year from the date they are taken. Use the Absence Tier Time Off Entry Details report to review recorded dates. You can't use a custom report to review the absence table tier dates and details of the balance and time off taken.
GBR Unpaid	Time off	Time off	Time off	
GBR Adoption Leave	Leave	Leave	Leave	
GBR Maternity Leave	Leave	Leave	Leave	
GBR Paternity Leave	Leave	Leave	Leave	
GBR Shared Parental Leave	Leave	Leave	Leave	
GBR Unpaid Parental Leave	Leave	Leave	Leave	

Go-Live Data Conversion

When preparing for go-live, ensure that:

- Someone cleans the company's historical data as soon as possible.
- You evaluate any inconsistencies in the company's documentation.
- You practice data extraction from the current system.

Doing this enables you to follow these guidelines for loading historical information:

- Load your event history in batches and in chronological sequence to aid in rolling accrual calculations.
- Follow the *Import Time Off Request Event Batch* web service considerations to aid in this process. For details, see the Integrations section.
- Review the information to see if any recalculations need to occur for existing modifications to user time off transactions. Example: User data is loaded to align with an absence table tier time off entry against a time off request event, and overrides are entered, or corrections applied.
- Enter all historical information prior to entering any current time off or leave transactions in the tenant.
- Coordinate with Payroll for inclusion or exclusion of events.

Payroll Considerations for UK Deployments

Scope	Consideration
Absence and Workday Payroll for the UK in scope.	Sometimes it's better to configure sick time off for the UK in hours instead of days. The only caveat for this is that when a worker takes sick time off in

Scope	Consideration
	hours, you don't know if those hours represent an entire shift or a partial shift. Example: If Sam takes off 4 hours, you don't know if this is the entire shift, half a shift, a third of a shift, and so on. For SSP (Statutory Sick Pay), Workday assumes that any time off in hours is for the full shift. Workday Payroll for the UK doesn't support cascading leave types that are linked to statutory payments, with the exception of Statutory Sick Pay. You can't effectively manage proration for leave of absence across multiple levels in the same way that absence tables can. Example: 100%, 50%, and 0%.
Absence in scope and potentially Workday Payroll for the UK in the future.	To future proof any potential deployments, it's a good idea to set up sick leave as time off unless there's a compelling reason to configure a leave type.

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.

Business Process	Considerations
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.
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.

Reports or Dashboards	Considerations
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 Time Off Results by Period for Workers	View accruals, paid, and unpaid time off for each period.
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	Adjust or 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.

Web Service	Considerations
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. • 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	Bulk upload a high volume of new time off requests into Workday.
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. • 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 Experience on page 2237
Setup Considerations: Time Off Plans on page 2258
Setup Considerations: Time Off on page 2266
Setup Considerations: Time Off Adjustments on page 2451
Setup Considerations: Accrual Adjustments and Overrides on page 2498
Setup Considerations: Leave of Absence on page 2554
Setup Considerations: Absence Occurrences on page 2624

Setup Considerations: Absence Balances on page 2511
Setup Considerations: Period Schedules on page 2334
Setup Considerations: Time Off Calculations for Payroll

Tasks

Steps: Set Up the Absence Calendar Experience on page 2243
Steps: Set Up Time Off Plans on page 2276
Steps: Set Up Segmented Security for Time Off on page 2279
Steps: Set Up Time Off Notifications on page 2427
Steps: Set Up Leave of Absence on page 2563
Steps: Set Up Absence Occurrences on page 2630
Steps: Set Up Absence Third-Party Calendar Integration
Create Custom Labels

Reference

2025R2 Feature Release Note: Document Generation Support for Absence Business Processes
The Next Level: Absence Engagement
The Next Level: Absence Minded: A Better Way to Manage Absences
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.

Field	Description
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. 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 and end date in the future. However, if the end date is also in the past, users with constrained security can only update the *Name* and *Display Name*.

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 2554

Reference

Reference: Leave Impacts on page 2607

The Next Level: Absence Thresholds

Steps: Set Up Document Generation for Absence Business Processes

Context

You can configure Absence business processes to dynamically generate documents when users access tasks that initiate the configured business processes.

Steps

1. Create a document template. You can use either the traditional text block method or Workday Docs:
   - When you use the traditional text block method, generate the dynamic document. See Steps: Generate Dynamic Documents.
   - When you use Workday Docs, set up Workday Docs for business processes. See Steps: Set Up Docs for Business Processes.
2. Configure document generation for the Absence business process. See Configure Generated Documents.

   We recommend that you add:

   - The *Generate Document* action step after the *Completion* step in the business process.
   - A *Review Documents* step. When you configure the review document step, select the *Generate Document* action step that you added.

Setup

Result

You create a parental leave document using Workday Docs. You add the *Generate Document* action step on the *Request Leave of Absence* business process, and select the parental leave document, configuring it specifically when workers request parental leave.

When a worker requests parental leave, the parental leave document is dynamically generated. Their manager can edit the document before it's routed to the worker for review and submission with the absence request.

Related Information

Reference

../../manage-workday/tenant-configuration/content-management/docsforbusinessprocesses/wks1658852033218.dita

2025R2 Feature Release Note: Document Generation Support for Absence Business Processes

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.

Report	Description	Example Use
Calculation Exception Audit	Displays the number 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 - Generic* domain in the Core Payroll functional area.	Identify and resolve calculations that reference other calculations 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.	Verify that all pay groups use the same gross and net pay accumulations.

Report	Description	Example Use
	• Period schedule. Security: *Set Up: Payroll - Pay Group Specific* domain in the Core Payroll functional area.	
Accounting	Displays all account posting rule sets and related configuration, such as: • Posting rules. • Posting rule conditions. • Condition dimensions. Security: *Set Up: Payroll - Company Specific (Accounting)* domain in the Core Payroll functional area.	Identify any companies and rule types associated with account 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	Identify and resolve deductions that are

Report	Description	Example Use
	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 - Generic* domain in the Core Payroll functional area.	retrieving values from benefit plans they aren't associated with.
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	Identify any pay groups with more results than

Report	Description	Example Use
	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.	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. Security: *Set Up: Payroll* domain in the Core Payroll functional area.	Identify custom reports that you can update to improve performance.

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	Identify run categories that don't use a specific status and use a generic Active or Terminated status instead.

Report	Description	Example Use
	functional area.	

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 Banking and Settlement and Financial Accounting functional areas. • *Set Up: Payroll - Company Specific (Accounting)* domain in the Core Payroll	Identify any companies and rule types associated with account posting rule sets.

Report	Description	Example Use
	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.
    - The Manage Absence calendar.

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

Questions	Considerations
	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: • *Edit Time Off for a Worker* (on the *Correct Time Off* business process). • *Request Leave for a Worker* (on the *Request Leave of Absence* business process). • *Request Time Off for a Worker* (on the *Request Time Off* business process).

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 2243.

Review the configuration in these sections of the *Correct Time Off*, *Request Leave of Absence*, and *Request Time Off* business process security policies:

- Policy Restrictions. Update the policy restrictions as needed.
- Attachment Settings in BP Toolbar. Update the attachment settings as needed. As part of the Absence Calendar Experience, when you request leave or request return from leave of absence, Attachments will fully replace the Supporting Documents section. See Steps: Enable Attachments on an Individual Business Process.

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 2246.

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.

If you’ve configured QuickTips using the Guidance Workspace for the Request Time Off task, you can’t configure them for the Request Absence task, as it isn’t currently supported. See FAQ: Guidance Workspace for the tasks that QuickTips currently supports.

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:

Business Processes	Considerations
	• *Request Leave for a Worker* • *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).
Platform and Product Extensions	• The mandatory Absence Calendar Experience includes a label change for events related to time off and leave of absence. Workday replaces the

Touchpoint	Consideration
	Time Off or Leave label of report fields on these business objects with Absence: • Leave Request Event • Leave Return Event • Time Off Event • Time Off Request Event • Worker Business Process To use the legacy Absence Calendar terminology, you can either: • Select the Enable Time Off and Leave Label for Absence Events check box in the Time Off section of the Edit Tenant Setup - HCM task to revert the automatic label change. • Review and manually replace the Absence label of report fields on the relevant business objects with Time Off or Leave. • When you use alerts to prompt users to specific tasks, consider revising your alert configuration to point to the Request Absence task and Manage Absence report.
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. • 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.

Related Information

Examples

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

2025R2 Enable Time Off and Leave Label for Absence Events

The Next Level: New Absence Calendar Experience Next Level Series

Steps: Set Up the Absence Calendar Experience

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 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.

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.

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 requests.

Steps

1. Edit 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: We plan to retire the *Absence Calendar* business process. When you uptake the New Absence Calendar Experience, remove any security groups from the initiating actions on the legacy Absence Calendar business process security policy.

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 process security policies:
        - Absence Calendar
        - Correct Time Off
        - Request Leave of Absence
        - Request Time Off

    Compare the legacy initiating actions that correspond to the initiating actions for the new Absence Calendar Experience:

Legacy Calendars	Absence Calendar Experience
Correct Absence	*Edit Time Off for a Worker*
Correct My Absence	*Edit Time Off for Self*
Correct My Time Off	*Edit Time Off for Self*
Correct Time Off	*Edit Time Off for a Worker*
Enter Absence	• *Request Leave for a Worker* • *Request Time Off for a Worker*
Enter Time Off	*Request Time Off for a Worker*
Place Worker on Leave	*Request Leave for a Worker*
Request Absence	• *Request Leave for Self* • *Request Time Off for Self*
Request Leave of Absence	*Request Leave for Self*
Request Time Off	*Request Time Off for Self*

3. (Optional) Specify how to display leave-entitlement balances when using the 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 prompt.
4. (Optional) Configure Absence Type Groups on page 2251.

    You can group together similar types of time offs, leave types, or absence tables, when submitting an absence request.
5. (Optional) Set up segmented security for time off and leave types on these domains:
    - *Access Leave Type (Segmented)*
    - *Access Time Off (Segmented)*

    See:
    - Steps: Set Up Segmented Security for Leave Types on page 2564.
    - Steps: Set Up Segmented Security for Time Off on page 2279.

6. (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.
7. (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*
8. (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 the legacy initiating actions with the corresponding initiating actions for the Absence Calendar Experience. See:

    - The table in Step 2.
    - Delegate My Tasks.
9. (Optional) Review any *To Do* steps on these business process definitions:

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

    Replace any legacy tasks with the corresponding tasks in the Absence Calendar Experience. See Reference: Absence Calendar Experience Comparison on page 2252.
10. (Optional) Review and update any custom reports or integrations that have fields, filters, or text strings that reference the legacy tasks. See Reference: Absence Calendar Experience Comparison on page 2252.
11. (Optional) Configure any help text as needed:
    a) Review any help text configured on these business processes:

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

        You can set up help text for steps in the *Correct Time Off*, *Request Leave of Absence*, and *Request Time Off* business processes by selecting Business Process > Maintain Help Text from the related actions menu of the business process definition. Workday displays 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.

b) To set up help text on the Manage Absence calendar:

   1. Access the Maintain Manage Absence Calendar Help Text task (secured to the *Set Up: Leave of Absence* and *Set Up: Time Off* domains).
   2. Select a condition rule and enter the help text.

   Note: The list of condition rules are the help text condition rules created on the business process. You can:

   - Create help text condition rules from the related actions menu of the business process. Select Business Process > Maintain Help Text. From the Condition prompt, select *Create Help Text Condition Rule*.
   - You can optionally translate the help text into any target language enabled in your tenant by accessing the Translate Business Object report (secured to the *Data Translation* domain), and from the Translatable Business Object prompt, selecting *Manage Absence Help Text*.

12. (Optional) Create custom labels to replace any of these terms that your organization doesn't use:

    - Absence
    - Leave
    - Time Off

    You can use custom labels to replace them with an alternative that's appropriate for your organization. See:

    - Create Custom Labels.
    - Steps: Set Up Non-English Custom Labels.
    - Steps: Set Up Non-English Custom Labels for Absence.

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.

Option	Description
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. Note: For optimal performance, Workday recommends that you don't provide Employee Self Service (ESS) access to subordinate organizations more than 2 levels below the worker's level.
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: • 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

Tasks

Set Up Assignable Roles

Set Up Nonsupervisory Organizations

Maintain Organization Types

Examples

Concept: Security Policies

Concept: Custom Organizations

Steps: Set Up Non-English Custom Labels for Absence

Prerequisites

Security: *Custom Label Management for Non-English* domain in the System functional area.

Context

You can configure overrides for terms in a non-English language. Example: In Workday, your organization uses the English term absence instead of time off. For German, you want to replace the German term *Urlaub* with a custom label override of *Abwesenheit*. After you configure overrides, when users sign into Workday with German as their preferred locale and display language settings, Workday displays the term *Abwesenheit* instead of *Urlaub* on the Workday Home page (within the Important Dates and Quick Links sections) and on other time off-related employee self-service reports and tasks.

Steps

1. Access the Maintain Non-English Custom Labels task.
2. Configure these values:

Option	Description
User Language	Example: Select *German (Germany)*.
Custom Label Context	Select *Absence Management*.

3. Review the custom labels. In the Override Value column, enter the corresponding override value for each Default Value that you want to replace. Example: For each instance of the German term *Urlaub*, enter an equivalent *Abwesenheit* term.
4. Clear the corresponding Disabled check box to activate your non-English custom labels in Workday. Custom labels are disabled by default.

5. Click OK. Workday starts a background process that prepares the custom labels for the Maintain Non-English Custom Label Overrides task and the *Get Non-English Custom Label Overrides* web service.

   You can let the process complete or click Notify Me Later. When you click Notify Me Later, the process must finish running before you can use the Maintain Non-English Custom Label Override task.

   Note: The *Put Non-English Custom Labels* web service also triggers the background process.
6. Click Configure Custom Label Overrides.
7. On the Maintain Non-English Custom Label Overrides task, configure these values:

Option	Description
User Language	Example: Select *German (Germany)*.
Custom Label	Select the custom label that you want to override. Example: Select *Urlaub*.
Functional Area	Example: Select *Time Off and Leave*.

8. Review the proposed values and select either Keep Original or Use Proposed Value. If you want to use all the proposed values, select Use All Proposed Values.
9. Click OK and Done.
10. (Optional) Access the Rebuild Search Index task.

    Rebuild the search index. Workday recommends that you don't rebuild search indexes manually but wait for the Friday server restart, when indexes rebuild automatically.

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 2568

Create Time Off Types on page 2294

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 Absen
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* • *Correct* • *Request*
Initiating Actions for Self Service Tasks	• *Correct My Time Off* • *Request Time Off*	• *Request Leave of Absence* • *Request Return from Leave of Absence*	• *Request* • *Correct*

Configuration/Functionality	Legacy Time Off Calendar and Leave of Absence Tasks		Legacy Absen
Self Service Tasks	• Correct Time Off • Request Time Off	• Request Leave of Absence	• Reques • Correct
Initiating Actions for on Behalf of Tasks	• *Correct Time Off* • *Enter Time Off*	• *Place Worker on Leave* • *Return Worker from Leave*	• *Correct A* • *Enter Ab*
On Behalf of Tasks	• Correct Time Off • Enter Time Off	• Place Worker on Leave • Return Worker from Leave	• Correct • Enter Al
Event Labels	• *Correct Time Off* • *Request Time Off*	• *Leave Request* • *Leave Return*	• *Correct A* • *Request A*
Interactive Calendar Experience?	Yes	No	Yes (Desktop
Self Service Calendar Support on Mobile?	Yes	No	No legacy Abs mobile. Use *Co* *Request Time O*
Edit Quantity for Individual Days?	No	N/A	Yes
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 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 2243.

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 2564.
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.
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 2256
Tasks
Steps: Set Up Leave of Absence on page 2563
Steps: Set Up Time Off Plans on page 2276

Reference

2022R2 What's New Post: Absence User Interface

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 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 2243.

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 2246.

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 2253

Steps: Set Up the Team Absence Calendar on page 2246

Configure Absence Type Groups on page 2251

Concept: Team Absence

Note:

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 2246.

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 2256

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. • 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.

Questions	Considerations
	• 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 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.

Questions	Considerations
	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 2243.

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.
- Configure the holiday calendar before the current year begins.
- Configure period schedules for about 2 years before and beyond going live on Workday.
- Don't add surplus work schedule calendars. It reduces the time Workday takes to identify workers' calendars based on eligibility rules.
- Don't set Accrual - Adjustments / Overrides Allowed for accrue-as-you-go plans.
- 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.
- For workers with unconventional work schedules, create and manually assign individual work schedules.

- Override carryover balances for periods that fall before the go-live date, to avoid accruals in Workday before that date.
- 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.
- Set the lowest frequency for a period schedule to *Weekly*. Don't use *Daily* period schedules on time off plans.

To increase efficiency:

- 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. Assign an eligibility rule to the termination time off such that it's visible only after the worker's termination takes effect.
- 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.
- 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.
- 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.
- Workday recommends that workers accrue sufficient time off before they submit their request.

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:

Domains	Considerations
	• 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.
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.

Reports	Considerations
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

Web Service	Considerations
Get Absence Inputs	The EIB based on this web service enables you to extract multiple time off plan overrides from Workday.
Put Absence Input	Use this 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 2322
Concept: Entering Time Off in Absence and Time Tracking on page 2317
Concept: Time Tracking and Absence Management on page 2834

Tasks

Create Holiday Calendars
Create Work Schedule Calendars
Manually Adjust or Override a Worker's Accrual on page 2502
Manually Schedule Storage of Time Off Balances on page 2522
Steps: Enable Managers to Create and Assign Custom Work Schedules
Steps: Set Up Absence Third-Party Calendar Integration
Steps: Set Up Workday Home

Reference

Reference: Feature Availability and Balance Tracking on page 2371
Reference: Tenant Analyzer on page 2231
Reference: Data Sections for Payroll Effective Change Interface

Examples

The Next Level: PATT Touchpoints and Reporting
The Next Level: PATT Touchpoints with Assignments
The Next Level: Overview of Primary Position Designation Impact
The Next Level: Day in the Life: Absence Administrator
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:

Question	Consideration
	• 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: • 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.
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

Question	Consideration
	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 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.

Question	Consideration
	• 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 2243.

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.

Domain	Considerations
	• 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, and to dynamically generate editable documents during the correction process. You can also define a conditional rule to 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. • Dynamically generate editable documents when a worker requests time off.
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, and 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. • Whether they're configured for crossing over midnight.
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) Request 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, 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.

Reports or Dashboards	Consideration
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 add new time off entries.
Import Time Off Request Event Batch	Use this web service to bulk upload a high volume of new time off requests into Workday. Before loading the data from the spreadsheet: • Change the line key when the worker changes. • Complete required business process tasks and approvals to confirm the new data values for workers.

Web Services	Consideration
	• 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. Follow these tips to help ensure a smooth and efficient import process for time off requests: • To prevent bad data in absence tables, avoid disabling the *Maximum Unpaid Time Off Units Allowed* validation. • Avoid loading multiple files in parallel, as this can reduce performance and introduce risks. • Keep re-evaluation enabled to prevent invalid data that can affect workers' balances and payroll. • For extremely large volumes of data, split the data across multiple files, but be aware that this introduces risk. • Include all time off entries for a worker in the same file for easier management. • Order requests chronologically, from oldest to most recent, to maintain clarity and accuracy.

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.

Touchpoint	Consideration
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. 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 2319

Concept: Entering Time Off in Absence and Time Tracking on page 2317

Setup Considerations: Time Off Plans on page 2258

Tasks

Steps: Set Up Time Offs on page 2278

Create Time Off Types on page 2294

Create Time Off Validations on page 2298

Steps: Set Up Absence Third-Party Calendar Integration

Examples

2024R1 Feature Release Note: Effective Dating on Service Dates in Absence

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 2294.
   b. Create a time off.

      See Steps: Set Up Time Offs on page 2278.
   c. (Optional) Create Time Off Validations on page 2298.
3. Track accrual, time off, and time off plan balances:
   a) Create Period Schedules for Time Off on page 2338.
   b) Create Balance Periods on page 2339.
   c) Create Accruals on page 2340.

   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 2313.
   - Create Time Off Plans That Track Balances on page 2302.
5. Create Absence Tables on page 2470.
6. Manually Schedule Storage of Time Off Balances on page 2522.
7. (Optional) Configure the Time and Absence Dashboard.

   See Concept: Dashboards for Time Tracking and Absence on page 2910.
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*

Time Off Plan	Priority
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 2316

Concept: Effective Dating for Absence on page 2322

Concept: Time Off Earnings

Tasks

Steps: Set Up Workday Home

Reference

Reference: Feature Availability and Balance Tracking on page 2371

Examples

Concept: Business Process Management

The Next Level: The Calculation Engine Behind Absence Management

Example: Create an Earning for a Single Time Off

Steps: Set Up Time Offs

Prerequisites

- Create Time Off Types on page 2294.
- Review Setup Considerations: Time Off on page 2266.
- Security: *Set Up: Time Off (Calculations - Absence Specific)* domain in the Time Off and Leave functional area.

Context

When you create definitions for each time off that workers can request, you can:

- Specify the time off type and how workers can enter the request.
- Enable adjustments.
- Configure validation rules and options for workers to sell back a portion of their accrued time off.
- Associate worktags with the time off.
- Define requirements when a time off has eligibility criteria 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. Create a time off. See Create Time Offs on page 2294.

   Note: Only fields within the tabs on this task are effective-dated. When you make changes to any fields outside of the tabs, Workday retroactively updates those fields with the new values in all existing time off definitions.
2. (Optional) On the Validations tab, Create Time Off Validations on page 2298.
3. (Optional) On the Time Off Plan Overrides tab, Create Time Off Plan Overrides for Time Offs on page 2505.
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) On the Worktags tab, associate worktags with the time off, enabling eligible workers to select worktag values when they enter time offs. See Steps: Set Up Worktags for Time Offs on page 2292.
6. On the Forfeiture Options tab, choose the forfeited absence component to adjust. The options are available when you select the Enable Forfeiture for Time Off Adjustment check box. See Steps: Enable Forfeiture Adjustments for Time Off Plans on page 2463.
7. (Optional) On the Sell Options tab, set up the options for workers to sell back any portion they accrued from this time off. The options are available when you select the Allow to Sell Time Off check box. See Steps: Set Up Sell Time Off on page 2448.
8. (Optional) Set Up Mass Operations.

   When reviewers are unavailable, or if you want to approve multiple in-progress time off requests, 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 requiring 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 2355

Concept: Time Tracking and Absence Management on page 2834

Concept: Entering Time Off in Absence and Time Tracking on page 2317

Concept: Time Off Earnings

Tasks

Steps: Enable Forfeiture Adjustments for Time Off Plans on page 2463

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 2316.
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
Reference
FAQ: Segmented Security for Time Off on page 2332
Reference: Time Entry Options on page 2876
Examples
Concept: Security Groups
Concept: Opt-In Features
The Next Level: Preparing for Time Off Segmented Security (Guide)
Example: Set Up Segmented Security for Time Off on page 2402

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.

   See:

   -
   - Concept: Service Step
   - Concept: Termination Impact
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 2459

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

Concept: Rule-Based Business Process Definitions

Tasks

Configure Rule-Based Business Processes

Examples

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

Tasks

Configure Rule-Based Business Processes

Examples

Concept: Completion Steps

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*.
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 Calendars.

If 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

Concept: Rule-Based Business Process Definitions

Tasks

Configure Rule-Based Business Processes

Examples

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
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

Option	Description
	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: Set Up Time Off Plans on page 2276

Steps: Set Up Worktags for Time Entry on page 2708

Examples

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: Set Up Time Offs on page 2278.

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 Offs

Prerequisites

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

Context

You can create definitions for time offs, enabling workers to record time away from work. When workers request time off, they can select from the time off definitions for which they're eligible.

Steps

1. Access the Create Time Off task.

   Note: Only fields within the tabs on this task are effective-dated. When you make changes to any fields outside of the tabs, Workday retroactively updates those fields with the new values in all existing time off definitions.

   Complete the task:

Option	Description
Code	Enter a time off code for web services and EIB uploads.
Require Position on Time Off Request	Select to: • Require workers on a worker-based plan to enter a position to request time off against. • Use 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 pay the worker's pay rate on the payslip.
Time Off Type	When 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.
Allow to Sell Time Off	Select to enable: • Eligible workers to sell back any portion they accrued from this time off. • Setting up the options for sell time off on the Sell Options tab.

Option	Description
Enable Forfeiture for Time Off Adjustment	Select to: • Define Forfeiture Options. • Use this time off to create Forfeiture Adjustments.
Hide From Time Tracking	When selected, workers can only enter time offs using the Absence Management Request Absence, Manage Absence, Enter Absence, or Enter Time Off tasks.
Picked up by Payroll Interface one Period in Arrears	Select to include time off: • From the prior processing period. • Taken before the prior period start date but approved after the last payroll interface run. Clear to include time off: • From the current period. • Taken in prior periods but approved after the last payroll interface run.
Visible for Team Absence	Select to make this time off available for selection on the team calendars.
Comments	Enter a high-level summary on the time off to explain what to use it for and any calculations you had to create.

2. As you complete the Details tab, consider:

Option	Description
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. The priority, combined with a lower time off limit on the time off plan and limit override value on the time off, or both, can affect paid and unpaid time off.
Adjustments Allowed	Select to allow adjustments to be made on this time off.
Hide from Worker Self Service	Select to prevent workers from requesting time off through self-service pages. Alternatively, you can set up segmented security for time off to control access to specific time offs using time off security

Option	Description
	segments and segment-based security groups. When you opt in to this feature, Workday removes this check box. Selecting the check box doesn't prevent workers and managers from viewing workers' time off balance. Also, managers can select the time off when entering time off on behalf of workers.
Time Calculation Tag	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.
Entry Option	When editing time offs that are part of a time off plan, select an option to specify how workers can enter requests for the time off: • *Enter through Time Off Only* (using the Absence Management Request Absence, or Manage Absence tasks). • *Enter through Time Tracking Only*. • *Enter through Time Tracking or Time Off*.
Display Start and End Time	Select to enable workers to enter values for start and end times when entering time off.
Start and End Time Required	Select to require workers to enter values for start and end times when entering time off.
Calculate Quantity Based on Start and End Time	Select to prevent workers from overriding the number of hours for the daily quantity. Applies only to time offs in time off plans with a Unit of Time value of *Hours*. When selected: • 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. • Workday automatically selects the Display Start and End Time and Start and End Time Required check boxes. • Workday populates the Daily Quantity value on the time off request, so workers can't override the value. When not selected, workers can override the number of hours for the daily quantity when entering time off.

Option	Description
	Example: You select the Display Start Time and End Time check box 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 automatically populates the Daily Quantity field with 9 hours if a daily default is configured on the time off plan, but the worker can override this value by entering 8 hours.
Default Start and End Time from Schedule	Select to automatically populate the Start Time and End Time fields for each day from the worker's schedule. Workday uses either the worker’s published schedule from Workday Scheduling, if one exists, or the worker’s assigned work schedule calendar. If neither exists, Workday leaves the start and end times empty.
Enable Crossing Midnight	Select to enable workers to submit a single time off request for a time off that's configured with start and end times when that time off crosses midnight. When selected, Workday automatically selects these check boxes: • Display Start and End Time • Start and End Time Required • Calculate Quantity Based on Start and End Time

Next Steps

(Optional) Configure the other tabs based on your business requirements. See Steps: Set Up Time Offs on page 2278.

Related Information

Examples

2025R1 Feature Release Note: Time Offs Crossing Midnight

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:
	• 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.

Field	Description
	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. 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.

Field	Description
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.
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

Field	Description
	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) for 1 or both of these worker types:

   - Contingent workers.
   - Employees.

   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

Option	Description
	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 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

Option	Description
	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. 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.

Option	Description
	Carryover occurs before accruals when both happen the same day.
Limit	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.
Amount of Time before Expiration	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.
Unit of Time for Expiration	Select *Days* or *Months* as the unit of time for measuring the expiration date. 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.

Option	Description
	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.
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. 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.

Option	Description
	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 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

Option	Description
	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.
Time Off for Forfeiture Adjustment	Workday uses the time off to create adjustments that offset the defined Forfeited Type on the Forfeiture Options tab of the time off.

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.

Option	Description
	• 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 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 2355

Concept: Time Off Earnings

Setup Considerations: Time Off Calculations for Payroll

Tasks

Steps: Set Up Time Off Plans on page 2276

Evaluate Absence Eligibility on page 2640

Override Time Off Plan Carryover on page 2506

Steps: Enable Forfeiture Adjustments for Time Off Plans on page 2463

Reference

Reference: Feature Availability and Balance Tracking on page 2371

Examples

Steps: Create Calendars

The Next Level: PATT Touchpoints with Assignments

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

Example: Configure Accruals Relative to Hire Date and Years of Service on page 2386

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) for 1 or both of these worker types:

   - Contingent workers.
   - Employees.

   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.

   If you don't select Track Balances, Workday doesn't track balances for the time off plan. You can't change this setting after you save this new time off plan.
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

Option	Description
	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: • 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

Option	Description
	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 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 2319

Tasks

Steps: Set Up Time Off Plans on page 2276

Examples

Steps: Create Calendars

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

Tasks

Steps: Set Up Segmented Security for Time Off on page 2279

Examples

Setup Considerations: Roles

Setup Considerations: Role-Based Security Groups

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 inMy 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,

Consideration	Entered through Time Off	Entered through Time Tracking
		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. If your tenant doesn't automatically run time calculations upon time off approval, you must recalculate each worker's time in Time Tracking.	Calculations automatically trigger when you enter the time off on the time entry calendar.
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.

Consideration	Entered through Time Off	Entered through Time Tracking
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 2834

Tasks

Steps: Set Up Time Offs on page 2278

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

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.

When defining time off plan eligibility criteria, keep in mind:

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

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.

Country/Country Region	Eligibility Rule	Eligible Workers
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: Set Up Time Offs on page 2278
Create Time Off Plans That Track Balances on page 2302
Create Time Off Plans That Don't Track Balances on page 2313
Create Accruals on page 2340
Examples
Example: Define Eligibility for a Time Off Plan on page 2372

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: Set Up Time Offs on page 2278

Create Accruals on page 2340

Steps: Set Up Time Off Plans on page 2276

Examples

Effective Dated Service Dates: Absence Implications

Effective Dated Service Dates: Absence Implications Part 2

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
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 2340
Reference
Reference: Tenant Analyzer on page 2231
Examples
2024R1 Feature Release Note: Effective Dating on Service Dates in Absence
The Next Level: Effective Dated Service Dates: Absence Implications
Effective Dated Service Dates: Absence Implications Part 2
2023R2 What's New Post: Effective Dating for Service Dates

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 the *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.

You can enable workers to correct time off by adding the relevant security group to the initiating action for the Correct Time Off Entry (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 2974

Tasks

Steps: Set Up Time Off Plans on page 2276

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	Work Schedule	Number of scheduled work hours.

Calculation Rule Name	Time Off Plan Units	Required Calendars	Maximum Value Returned
hours for date (based on As of Date) no rounding			
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 maximum to any hourly value.	Hours	Holiday	Zero if the time off date is a holiday and 24 if the date isn’t a holiday.
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.

Calculation Rule Name	Time Off Plan Units	Required Calendars	Maximum Value Returned
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.

Related Information

Tasks

Steps: Set Up Time Offs on page 2278

Steps: Create Calendars

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*.

Data Entry Validation	Time Off Entries to Include	Default Validation Message
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* *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* 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
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 2298

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 2279

Examples

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.

Examples: 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.
- 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 2355

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 2319

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. 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.	Enable you to create and manage period schedules for payroll.

Domains	Considerations
• *Set Up: Payroll Interface* in the Payroll Interface functional area.	
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.
Payroll accounting	Workday creates forward accruals when a pay period spans multiple accounting reporting periods.

Features	Considerations
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 2822

Set Up Payroll and Time Tracking Period Schedules

Create Period Schedules for Time Off on page 2338

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 2276

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 2276

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. • A calculation based on a service rate table. • Any other type of calculation.

Option	Description
	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*

Option	Description
	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 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. (Optional) 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

Option	Description
	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. 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. 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 you can't remove it.
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 you can't remove it.
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 2358.

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:

Option	Description

	• *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 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

Option	Description
	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 2445
Concept: Eligibility for Time Off Plans, Time Off, and Accruals on page 2319
Concept: Accrual Expiration on page 2358
Tasks
Steps: Set Up Time Off Plans on page 2276
Evaluate Absence Calculations on page 2640
Reference
The Next Level: The Calculation Engine Behind Absence Management
FAQ: Pause Annual Time Off Accruals for Absent Workers on page 2362
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 2386
Example: Create an Accrue-As-You-Go Bereavement Plan on page 2378

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 2517

Create Accruals on page 2340

Steps: Set Up Time Off Plans on page 2276

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. 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 2519

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*.
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 2356.
- The calculation order for accruals that occur the same day, as defined by the accrual priority. See Accrual Priorities on page 2357.
- The processing order for time offs, as defined by the time off priority. See Time Off Processing Order on page 2358.

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

Priority	Current Balance: Paid Time Off	Accrual Amount	Balance + Accrual	Upper Limit	Hours Forfeited
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 2302

Steps: Set Up Time Offs on page 2278

Create Accruals on page 2340

Reference

FAQ: When do workers see the Maximum Unpaid Validation? on page 2333

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 Carryoversection 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 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

Concepts

Concept: Forfeiture Adjustments on page 2461

Tasks

Steps: Enable Forfeiture Adjustments for Time Off Plans on page 2463

Reference

Reference: Absence Management Cards

FAQ: Forfeiture Adjustments on page 2464

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 2378

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 2476

Setup Considerations: Absence Tables on page 2466

Tasks

Create Absence Tables on page 2470

Create Time Off Plans That Track Balances on page 2302

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 2302

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 2366
- 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 2368
- When you change a service date, in which periods does Workday reflect the change? on page 2369

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*	The most recent seniority date for the worker based on the period start date or end date.

IVC	Description
• *Recent Seniority Date Based on Period Start 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 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 theOriginal Hire Datefield automatically from the earliestHire Date. However, if you manually change theOriginal Hire Datefield using theEdit Service Datestask, Workday doesn't continue to populate theOriginal Hire Datefield. The existing*Worker: Original Hire Date*calculation returns the latestOriginal Hire Datevalue, 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 • 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.

Business Process	Effective Date
	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 541

Create Accruals on page 2340

Create Time Off Plans That Track Balances on page 2302

Recalculate Balances for Workers on page 2526

Steps: Set Up Time Offs on page 2278

Reference

Troubleshooting: Time Off on page 2548

Examples

Example: Create a 90-Day Waiting Period for Accruals on page 2384

Example: Configure Accruals Relative to Hire Date and Years of Service on page 2386

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	*equal to*	*False*

1st Operand	Operator	2nd Operand
Effect (a Workday-owned instance value calculation)		

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 2548

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

Feature	Plans That Track Balances	Plans That Don't Track Balances
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*

Field	Description
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*

Field	Description
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*
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 2319

Tasks

Create Time Off Plans That Track Balances on page 2302

Create Time Off Plans That Don't Track Balances on page 2313

Create Accruals on page 2340

Steps: Set Up Time Offs on page 2278

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*
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 2600

Tasks

Create Time Off Plans That Track Balances on page 2302

Create Leave of Absence Rules on page 2566

Examples

Example: Require Workers to Use Time Off Before FMLA on page 2579

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*
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 2319
Tasks
Create Accruals on page 2340
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*

Field	Value
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*

Field	Value
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. 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.

Field	Value
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 2361

Tasks

Create Time Off Types on page 2294

Steps: Set Up Time Offs on page 2278

Create Time Off Plans That Track Balances on page 2302

Create Accruals on page 2340

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*

Field	Value
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)*
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*
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 2302
Create Accruals on page 2340

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*

Field	Value
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*
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*

Field	Value
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*
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 2316
Setup Considerations: Calculations

Tasks

Change Worker Service Dates on page 541
Create Time Off Plans That Track Balances on page 2302
Create Accruals on page 2340

Reference

Troubleshooting: Time Off on page 2548

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 2294

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*

Option	Value
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)*
Adjustments Allowed	Enable adjustments.
Entry Option	Specify whether workers can enter requests for this time off through Time Tracking, Absence Management, or both.

    c) 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. Create a time off plan.
    a) Access the Create Time Off Plan task.
    b) 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)*

Option	Value
Period Schedule	*Weekly (Mon-Sun)*
Unit of Time	*Hours*
Effective Date	Enter a date for this plan to be available for your workers.

c) On the Balance tab, enter:

Option	Value
Balance Visibility	*Never show balance*
Calendar Display	*Plan*
Overrides Allowed	Enable overrides.
Date	*Balance Period Start Date*

d) 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*

e) On the Accrual tab, select *State Sick Leave Accrual* on the Adds to Balance field.
f) On the Eligibility tab, specify that the time off plan is available for all workers in your state using the Country / Country Region field.
g) On the Time Off tab, add a row to the grid and select *State Sick Leave Time Off* on the Subtracts from Balance prompt.
h) Click OK.
i) On the Accrual tab, select *State Sick Leave Accrual* on the Adds to Balance field.
j) On the Eligibility tab, specify that the time off plan is available for all workers in your state using the Country / Country Region field.
k) On the Time Off tab, add a row to the grid and select *State Sick Leave Time Off* on the Subtracts from Balance prompt.
l) Click OK.

5. Edit the accrual.
   a) Access the Edit Accrual task and enter *State Sick Leave Accrual*.
   b) Select the Time Off Plan Overrides tab.
   c) Enter *State Sick Leave Time Off Plan* in the Based On field.
   d) Click OK.

6. Create a calculated field that counts the number of sick time hours.
    a) Access the Create Calculated Field task.
    b) Enter a Field Name. Example: *24 Hour Count*.
    c) For Business Object, select *Time Off Event*.
    d) For Function, select *Count Related Instances*.
    e) Click OK.
    f) On the Calculation tab:
        - For Related Field, select *Time Off Entry*.
        - For Count, select *Instances where condition is true*, and select Create Calculated Field.
    g) Enter a Field Name. Example: *24 Hour True/False*.
    h) For Business Object, select *Time Off Entry*.
    i) Click OK.
    j) On the Calculation tab, create this condition rule in the True/False Condition grid.

Field	Operator	Comparison Type	Comparison Value
Time Off Amount in Balance Period	*greater than*	*Value specified in this filter*	*24*

    k) Click OK.
    l) Click OK and Done.
7. Edit the *Request Time Off* business process to add a validation that limits paid sick time to 24 hours per year.
    a) Access the Edit Business Process task and select your default or custom *Request Time Off* business process definition.
    b) From the related actions menu of the initiation step, select Business Process > Maintain Step Conditions.
    c) Click OK.
    d) Add a row in the Validation Conditions grid and in the Rule field, select Create Condition Rule.
    e) Click OK.
    f) In the Description field, enter *If 24-Hour Sick Time Off then Validate Request Time Off for Global Modern Services step a - initiation*
    g) Add these condition rules:

Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
Time Off Types for Time Off Event	*any in the selection list*	*Value specified in this filter*	*Sick (Hours)*
24 Hour Count	*greater than or equal to*	*Value specified in this filter*	*1*

    h) 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 new time off requests into Workday. For performant data loads, we recommend you use this EIB when the batch of requests exceeds either:

- 100 requests against an absence table.
- 1,000 requests directly against a time off type or plan.

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 2434

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

Field	Consideration
	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. 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*
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: Identify Primary Position for Time Off Approval

Illustrates how to add a condition rule with calculated fields on the *Request Time Off* business process to identify the worker's primary position and route the time off approval to the appropriate manager.

Context

Your company allows worker's to have multiple positions. When they request time off, they need to specify the position that the time off relates to. When workers have 2 positions, Workday can route the request to either the primary manager or non-primary manager. You plan to configure the *Request Time Off* business process so that Workday routes the approval step to the primary manager.

If you specify a Routing Modifier on the approval step, when workers have 2 positions, you can add a condition rule with calculated fields to identify the primary manager for routing.

Steps

1. Create a calculated field that looks up all positions for the worker on the time off event:
   a) Access the Create Calculated Field task.
   b) Enter these values and click OK:

Field	Value
Field Name	*LRV Worker All Positions*
Business Object	*Time Off Event*
Function	*Lookup Related Value*

   c) Select these calculation values and click OK :

Field	Value
Lookup Field	*Worker*
Return Value	*All Positions*

2. Create a calculated field that extracts the primary position from all of the worker's positions:
   a) Click Create Another Calculation .
   b) Enter these values and click OK:

Field	Value
Field Name	*EMI Primary Position from All Positions*
Business Object	*Time Off Event*

Field	Value
Function	*Extract Multi-Instance*

c) Select these calculation values and click OK:

Field	Value
Source Field	*LRV Worker All Positions*
Condition	*Primary Job*

3. Create a calculated field that extracts the result from the *EMI Primary Position from All Positions* field.
   a) Click Create Another Calculation .
   b) Enter these values and click OK:

Field	Value
Field Name	*ESI Primary Position from All Positions*
Business Object	*Time Off Event*
Function	*Extract Single-Instance*

   c) Enter these calculation values and click OK:

Field	Value
Source Field	*EMI Primary Position from All Positions*
Condition	*Any is True*
Sort Field	*Position*

4. Create a calculated field that looks up the result from the *ESI Primary Position from All Positions* field.
   a) Click Create Another Calculation.
   b) Enter these values and click OK:

Field	Value
Field Name	*LRV Primary Position from All Positions*
Business Object	*Time Off Event*
Function	*Lookup Related Value*

   c) Select these calculation values and click OK :

Field	Value
Lookup Field	*ESI Primary Position from All Positions*
Return Value	*Position*

5. Create a calculated field that checks whether the time off event contains a position value.
   a) Click Create Another Calculation .
   b) Enter these values and click OK:

Field	Value
Field Name	*Time Off Entry Position is not Empty*
Business Object	*Time Off Event*

Field	Value
Function	*True/False Condition*

c) Enter these calculation values and click OK:

Field	Value
And/Or	*And*
Field	*Position*
Operator	*is not empty*

6. Create a calculated field that extracts the result from the *Time Off Entry Position is not Empty* condition.
   a) Click Create Another Calculation .
   b) Enter these values and click OK:

Field	Value
Field Name	*ESI Position from Time Off Event from Time Off Entry*
Business Object	*Time Off Event*
Function	*Extract Single-Instance*

   c) Enter these values and click OK:

Field	Value
Source Field	*Time Off Entry*
Condition	*Time Off Entry Position is not Empty*
Sort Field	*Position*

7. Create a calculated field that looks up the result of the *ESI Position from Time Off Event from Time Off Entry* field.
   a) Click Create Another Calculation .
   b) Enter these values and click OK:

Field	Value
Field Name	*LRV Position from Time Off Event from Time Off Entry*
Business Object	*Time Off Event*
Function	*Lookup Related Value*

   c) Select these calculation values and click OK :

Field	Value
Lookup Field	*ESI Primary Position from All Positions*
Return Value	*Position*

8. Edit the *Request Time Off* business process definition.
    a) From the related actions menu of the workflow step for the Approval step, select Business Process > Create Condition Rule.
    b) In the Description text box, enter *Routes the time off approval to the manager for the primary position* .
    c) Enter these rule conditions and click OK.

Field	Value
And/Or	*And*
Source External Field or Condition Rule	*ESI Primary Position from All Positions*
Relational Operator	*in the selection list*
Comparison Type	*Value from another field*
Comparison Value	*EMI Primary Position from All Positions*

Related Information

Tasks

Create Time Offs on page 2294

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*
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*

Field	Value
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 2279

Reference

2021R1 What's New Post: Segmented Security for Time Off

FAQ: Segmented Security for Time Off on page 2332

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*

Field	Value
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*
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

Parental Leave Time Off Plan Example

Example Steps: Configure Parental Leave as Time Off

You can configure parental leave in Workday as time off instead of leave of absence when you have specific functional requirements and desired tracking outcomes such as:

- Worker status display. When a worker is on time off, their status in Workday remains unchanged. In contrast, a leave of absence explicitly changes the worker's status to *On Leave*. For parental leave, if your company prefers the worker's status to appear as active for short, intermittent parental leave periods, or to avoid certain system implications of an *On Leave* status, time off might be your preferred configuration.
- Tracking multiple leave requests. When a worker who's currently *Active* requests a leave of absence, and a manager or administrator approves that request, their status changes to *On Leave*. This change in status triggers a staffing event on a leave of absence event, which can impact payroll, benefits, and other downstream processes. If a worker is already on a leave of absence and they move to another leave type, this results in a data change event, not a new staffing event. If your company requires each instance of parental leave (especially when taken intermittently or in conjunction with other leaves) to be tracked as a distinct event, or to trigger specific staffing-related processes, using time off enables you to achieve this.
- Duration and return to work. Companies typically use time off for absences with a short duration and a known return-to-work date, where you don't explicitly require manager approval for return. While parental leave can be long, some company policies or country regulations might involve shorter, fixed-duration parental leave periods that align more closely with time off characteristics. For longer, more open-ended leaves with estimated end dates and requiring manager approval for return, leave of absence is generally more suitable.
- Balance tracking and accrual. Time off plans often involve workers accruing balances over time. Leave of absence types, however, typically don't involve accrual but rather grant an entitlement based on eligibility. If a parental leave policy involves an accrual model, or a fixed entitlement that you want to manage similarly to other time off accruals, configuring it as time off might be more straightforward.
- Flexible payroll configuration. Configuring leave types as time off can offer more flexibility in managing different pay rates for various leave periods. Example: Statutory Sick Pay (SSP) or parental leave where varying pay rates might apply across different segments of the leave, making time off a practical choice for payroll processing.

Context

This example illustrates how to set up a time off plan for parental leave that workers are eligible for each period if they have at least 1 dependent under the age of 4 in that period. Workers receive 5 days in the period in which 1 of their dependents has a birthday, starting with the child's date of birth, and repeating on their first, second, and third birthdays. Example: Adam has a child born in April 2019. Each April, he receives 5 days up until April 2023 when he loses eligibility as his child is 4 years old.

Ideally, you would configure a leave type for this use case, which enables you to use calculations that isolate individual dependents. With leave of absence, you can require eligible employees to specify exactly which dependent they're taking each leave request event for, and then drive both the leave balance calendar start and end date, and the entitlement, based on the age of that dependent. If you set up the leave type to use entitlement per event, you can then also draw down from the same balance for each request related to the same dependent.

Within time off and Workday's calculations for Payroll and Absence, you can't use calculated fields in this manner, and can't require additional fields such as dependents in the same way as leave of absence. However, the advantage of using time off for this use case is that you can support:

- Partial day requests.
- Accruing entitlements in a more user-friendly way, without the need to return workers from leave.

Steps

1. Example: Configure a Parental Leave Upper Limit.
2. Example: Create a Worker Eligibility Rule for Parental Leave.
3. Example: Configure an Accrual for Parental Leave.
4. Example: Create a Time Off Plan for Parental Leave.
5. Example: Create an Absence Balance
6. Example: Configure an Accrual Adjustment for Parental Leave.
7. Example: Add an Accrual Adjustment to the Plan

Result

The time off plan is available for eligible workers to:

- Accrue 5 days for each child born or under 4 years of age within a specific period.
- Request absence for parental leave.

Next Steps

You can access the Time Off Results by Period report on the Worker Time and Absence profile to view accruals for the time off plan for eligible workers.

Example: Configure a Parental Leave Upper Limit

Context

This example illustrates how to configure a series of nested calculations to calculate the Time Off Plan Balance Upper Limit value for a time off plan. This top-level arithmetic calculation (*Parental Leave Upper Limit*) enables Workday to check how many children under the age of 4 a worker has, as of the period end date, and prevent the plan balance going above the annual limit of 5 days per child. You'll create 9 separate calculations that together feed into the final result for the top-level calculation, which you'll use later when configuring the time off plan:

- Dependent Age at Period End Date
- Dependent Age < 4 as of Period End
- Next Period Start Date
- Dependent Date of Birth Exists
- Dependent Date of Birth Exists in Period or Prior Period
- Dependent Age GTE 0 and < 4 as of Period End Date
- CC Dependent Age < 4 as of Period End Date
- Number of Dependents Under Age 4 as of Period End Date
- Parental Leave Upper Limit

Prerequisites

Read Example Steps: Configure Parental Leave as Time Off.

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off* and *Set Up: Time Off (Calculations - Generic)* domains in the Time Off and Leave functional area.

Steps

1. Dependent Age at Period End Date

   Create a calculation to determine the dependent's age at the period end date, using Workday-owned instance value calculations (IVCs) for the period start and end dates.

   a) Access the Create Date Difference Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Age at Period End Date*
Category	*Absence*
Interval	*Year*
Start Date	*Dependent: Date of Birth*
End Date	*Period: Period End Date*

2. Dependent Age < 4 as of Period End

   Create a calculation to determine whether the dependent's age is less than 4 as of the period end date, using the result of the previous calculation.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Age < 4 as of Period End*
Category	*Absence*
1st Operand	*Dependent Age at Period End Date*
Operator	*less than*
2nd Operand	*4*

3. Next Period Start Date

   Create a calculation to determine the start of the next period using a Workday-owned IVC.

   a) Access the Create Date Increment/Decrement Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Next Period Start Date*
Category	*Absence*
Start Date	*Period: Period End Date*
Day	1

4. Dependent Date of Birth Exists

   Create a calculation to return the dependent's date of birth for the period, using the result of the previous calculation.

   a) Access the Create Date Difference Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth Exists*
Category	*Absence*
Interval	*Day*
Start Date	*Dependent: Date of Birth*
End Date	*Next Period Start Date*

5. Dependent Date of Birth Exists in Period or Prior Period

   Create a calculation to determine whether the dependent's date of birth exists in this or a prior period, using the result of the previous calculation.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth Exists in Period or Prior Period*
Category	*Absence*
1st Operand	*Dependent DOB Exists*
Operator	*greater than*
2nd Operand	*0*

6. Dependent Age GTE 0 and < 4 as of Period End Date

   Create a calculation to determine whether the dependent's age is greater than or equal to zero and less than 4 as of the period end date, using 2 of the previous calculation results as conditions.

   a) Access the Create Logic Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Age GTE 0 and < 4 as of Period End Date*
Category	*Absence*
Operator	*AND*
Calculation	*Dependent Age < 4 as of Period End*
	Dependent DOB Exists in Period or Prior Period

7. CC Dependent Age < 4 as of Period End Date

   Create a calculation to check that the dependent's age is under 4 as of the period end date, using the previous calculation as a condition, and returning a result if the condition is true.

   a) Access the Create Conditional Calculation task.
   b) Enter or select these values:

Field	Value
Name	*CC Dependent Age < 4 as of Period End Date*
Category	*Absence*
Order	*a*
Condition	*Dependent Age GTE 0 and < 4 as of Period End Date*
Result	*1*
Default Response	*0*

8. Number of Dependents Under Age 4 as of Period End Date

   Create a calculation to determine the number of dependents under the age of 4 as of the end of the period by aggregating the result of the previous calculation.

   a) Access the Create Aggregate Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Number of Dependents Under Age 4 as of Period End Date*
Category	*Absence*
Function	*Sum*
Operand	*CC Dependent Age < 4 as of Period End Date*
Instances for Operand Calculation	*Dependents*

9. Parental Leave Upper Limit

   You can now create the top-level calculation for the Time Off Plan Balance Upper Limit value using the previous calculation that ties all of the results together.

   a) Access the Create Arithmetic Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Parental Leave Upper Limit*
Category	*Absence*
1st Operand	*Number of Dependents Under Age of 4 as of Period End Date*
Operator	*Multiply*
2nd Operand	*5*

Next Steps

Example: Create a Worker Eligibility Rule for Parental Leave

Example: Create a Worker Eligibility Rule for Parental Leave

This example illustrates how to create a worker eligibility rule for a parental leave time off plan.

Context

You'll create a value comparison calculation for an eligibility rule that checks whether the worker has a dependent under the age of 4 as of the period end date. You'll use this calculation later when configuring worker eligibility for the time off plan.

Prerequisites

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off* and *Set Up: Time Off (Calculations - Generic)* domains in the Time Off and Leave functional area.

Steps

1. Access the Create Value Comparison Calculation task.
2. Enter or select these values and click OK and Done.

Field	Value
Name	*Worker Has Dependent Under 4 as of Period End Date*
Category	*Absence*
1st Operand	*Number of Dependents Under 4 as of Period End Date*
Operator	*greater than or equal to*
2nd Operand	*1*

Next Steps

Example: Configure an Accrual for Parental Leave

Example: Configure an Accrual for Parental Leave

This example illustrates how to configure a series of nested calculations for an accrual calculation value that adds to the balance for a time off plan for parental leave. This top-level arithmetic calculation (*Parental Leave Entitlement Based on Birthdays in Current Period*) enables Workday to calculate an accrual of 5 days for a worker in a period when at least 1 of their dependents has a birthday. The accrual starts from the child's date of birth, and repeats on their first, second, and third birthdays.

Context

You'll create 18 separate calculations that together feed into the final result for a top-level accrual calculation, a calculation for a scheduling rule that starts the accrual for a worker when their child is born in the current period, and an accrual where you'll add the top-level calculation and the scheduling rule:

- Dependent Date of Birth LTE Period End Date
- Dependent Date of Birth GTE Period Start Date
- Dependent Date of Birth in Current Period
- Dependent Date of Birth + 1 Year
- Dependent Date of Birth + 1 Year LTE Period End Date
- Dependent Date of Birth + 1 Year GTE Period Start Date
- Dependent Date of Birth + 2 Years

- Dependent Date of Birth + 2 Years LTE Period End Date
- Dependent Date of Birth + 2 Years GTE Period Start Date
- Dependent Date of Birth + 3 Years
- Dependent Date of Birth + 3 Years LTE Period End Date
- Dependent Date of Birth + 3 Years GTE Period Start Date
- Dependent 1st Birthday in Current Period
- Dependent 2nd Birthday in Current Period
- Dependent 3rd Birthday in Current Period
- Dependents Born with Birthdays in Current Period
- Number of Dependents Born in Current Period
- Parental Leave Entitlement Based on Birthdays in Current Period
- Worker Has Dependent Born in Current Period
- Create an accrual for parental leave.

Prerequisites

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off* and *Set Up: Time Off (Calculations - Generic)* domains in the Time Off and Leave functional area.

Steps

1. Dependent Date of Birth LTE Period End Date

   Create a calculation to determine whether the dependent's date of birth occurs on or before the end of the period, using the result of 2 Workday-owned IVCs as the operands.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth LTE Period End Date*
Category	*Absence*
1st Operand	*Dependent: Date of Birth*
Operator	*less than or equal too*
2nd Operand	*Period: Period End Date*

2. Dependent Date of Birth GTE Period Start Date

   Create a calculation to determine whether the dependent's date of birth occurs on or after the start of the period, using the result of 2 Workday-owned IVCs as the operands.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth GTE Period Start Date*
Category	*Absence*
1st Operand	*Dependent: Date of Birth*
Operator	*greater than or equal too*
2nd Operand	*Period: Period Start Date*

3. Dependent Date of Birth in Current Period

   Create a calculation to determine whether the dependent's date of birth is in the current period using the results of the previous calculations.

   a) Access the Create Logic Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth in Current Period*
Category	*Absence*
Operator	*AND*
Calculation	*Dependent Date of Birth GTE Period Start Date*
	Dependent Date of Birth LTE Period End Date

4. Dependent Date of Birth + 1 Year

   Create a calculation to determine the date of the first birthday for the dependent, using a Workday-owned IVC.

   a) Access the Create Date Increment/Decrement Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth + 1 Year*
Category	*Absence*
Start Date	*Dependent: Date of Birth*
Year	1

5. Dependent Date of Birth + 1 Year LTE Period End Date

   Create a calculation to determine whether the dependent's first birthday occurs on or or before the end of the period, using the result of the previous calculation.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth + 1 Year LTE Period End Date*
Category	*Absence*
1st Operand	*Dependent Date of Birth + 1 Year*
Operator	*less than or equal to*
2nd Operand	*Period: Period End Date*

6. Dependent Date of Birth + 1 Year GTE Period Start Date

   Create a calculation to determine whether the dependent's first birthday occurs on or after the start of the period, using the result of the previous calculation.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth + 1 Year GTE Period Start Date*
Category	*Absence*
1st Operand	*Dependent Date of Birth + 1 Year*
Operator	*greater than or equal to*
2nd Operand	*Period: Period Start Date*

7. Dependent Date of Birth + 2 Years

   Create a calculation to determine the date of the second birthday for the dependent, using a Workday-owned IVC.

   a) Access the Create Date Increment/Decrement Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth + 2 Years*
Category	*Absence*
Start Date	*Dependent: Date of Birth*
Year	2

8. Dependent Date of Birth + 2 Years LTE Period End Date

   Create a calculation to determine whether the dependent's second birthday occurs on or before the end of the period, using the result of the previous calculation.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth + 2 Years LTE Period End Date*
Category	*Absence*
1st Operand	*Dependent Date of Birth + 2 Years*
Operator	*less than or equal to*
2nd Operand	*Period: Period End Date*

9. Dependent Date of Birth + 2 Years GTE Period Start Date

   Create a calculation to determine whether the dependent's second birthday occurs on or after the start of the period, using the result of the previous calculation.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth + 2 Years GTE Period Start Date*
Category	*Absence*
1st Operand	*Dependent Date of Birth + 2 Years*
Operator	*greater than or equal to*
2nd Operand	*Period: Period Start Date*

10. Dependent Date of Birth + 3 Years

    Create a calculation to determine the date of the third birthday for the dependent, using a Workday-owned IVC.

    a) Access the Create Date Increment/Decrement Calculation task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth + 3 Years*
Category	*Absence*
Start Date	*Dependent: Date of Birth*
Year	3

11. Dependent Date of Birth + 3 Years LTE Period End Date

    Create a calculation to determine whether the dependent's third birthday occurs on or or before the end of the period, using the result of the previous calculation.

    a) Access the Create Value Comparison Calculation task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth + 3 Years LTE Period End Date*
Category	*Absence*
1st Operand	*Dependent Date of Birth + 3 Years*
Operator	*less than or equal to*
2nd Operand	*Period: Period End Date*

12. Dependent Date of Birth + 3 Years GTE Period Start Date

    Create a calculation to determine whether the dependent's third birthday occurs on or after the start of the period, using the result of the previous calculation.

    a) Access the Create Value Comparison Calculation task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Date of Birth + 3 Years GTE Period Start Date*
Category	*Absence*
1st Operand	*Dependent Date of Birth + 3 Years*
Operator	*greater than or equal to*
2nd Operand	*Period: Period Start Date*

13. Dependent 1st Birthday in Current Period

    Create a calculation to determine whether the dependent's first birthday is in the current period.

    a) Access the Create Logic Calculation task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent 1st Birthday in Current Period*
Category	*Absence*
Operator	*AND*
Calculation	*Dependent Date of Birth + 1 Year GTE Period Start Date*
	Dependent Date of Birth + 1 Year LTE Period End Date

14. Dependent 2nd Birthday in Current Period

    Create a calculation to determine whether the dependent's second birthday is in the current period.

    a) Access the Create Logic Calculation task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent 2nd Birthday in Current Period*
Category	*Absence*
Operator	*AND*
Calculation	*Dependent Date of Birth + 2 Years GTE Period Start Date*
	Dependent Date of Birth + 2 Years LTE Period End Date

15. Dependent 3rd Birthday in Current Period

    Create a calculation to determine whether the dependent's third birthday is in the current period.

    a) Access the Create Logic Calculation task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent 3rd Birthday in Current Period*
Category	*Absence*
Operator	*AND*
Calculation	*Dependent Date of Birth+ 3 Years GTE Period Start Date*
	Dependent Date of Birth + 3 Years LTE Period End Date

16. Dependents Born with Birthdays in Current Period

    Create a calculation to check that the worker has dependent's who are born or have birthdays in the current period, using the previous calculations, and return a result for each condition if true.

    a) Access the Create Conditional Calculation task.
    b) Enter or select these values:

Field	Value
Name	*Dependents Born with Birthdays in Current Period*
Category	*Absence*
Default Response	*0*

    c) Add 4 rows in the Conditional Calculations grid:

Order	Condition	Result
a	*Dependent Date of Birth in Current Period*	*1*
b	*Dependent 1st Birthday in Current Period*	*1*
c	*Dependent 2nd Birthday in Current Period*	*1*
d	*Dependent 3rd Birthday in Current Period*	*1*

    d) Click OK and Done.

17. Number of Dependents Born in Current Period

    Create a calculation to determine the number of dependents born in the current period using the results of the previous calculation.

    a) Access the Create Aggregate Calculation task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Number of Dependents Born in Current Period*
Category	*Absence*

Field	Value
Function	*Sum*
Operand	*Dependents Born with Birthdays in Current Period*
Instances for Operand Calculation	*Dependents*

18. Parental Leave Entitlement Based on Birthdays in Current Period

    Create a calculation for the parental leave accrual entitlement based on birthdays in the current period. This is the top-level calculation for the accrual.

    a) Access the Create Arithmetic Calculation task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Parental Leave Entitlement Based on Birthdays Current Period*
Category	*Absence*
1st Operand	*Number of Dependents Born in Current Period*
Operator	*Multiply*
2nd Operand	*5*

19. Worker Has Dependent Born in Current Period

    Create a calculation for the scheduling rule for the accrual.

    a) Access the Create Value Comparison Calculation task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Worker Has Dependent Born in Current Period*
Category	*Absence*
1st Operand	*Number of Dependents Born in Current Period*
Operator	*greater than or equal to*
2nd Operand	*1*

20. Create an accrual for parental leave.

    a) Access the Create Accrual task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Parental Leave Accrual*
Code	*parental_leave_accrual*
Calculation	*Parental Leave Entitlement Based on Birthdays Current Period*
Priority	*2*
Options	*None*

    c) In the Scheduling grid, add a row and select *Worker Has Dependent Born in Current Period*
    d) Click OK.

Next Steps

Example: Create a Time Off Plan for Parental Leave

Example: Create a Time Off Plan for Parental Leave

This example illustrates how to set up a time off plan for parental leave.

Context

You're configuring the time off plan so that the plan's balance never goes above 5 days, despite the workers never using any of their accrual. Instead, when the accrual attempts to award 5 days, Workday forfeits the accrual as the worker's balance is already 5 days.

Example: Adam has another child that is born in March 2021, so receives an extra 5 days in March, as well as the 5 days for his child born in April. The upper limit increases against the time off plan to allow it to go up to 10 days while 2 children are under the age of 4. From April 2023, when 1 child becomes 4, this limit drops back to 5 days again.

Create a time off plan with:

- A calendar year balance period with unlimited carryover so the balance doesn't reset on January 1 of each year.
- An upper limit. Workday checks how many children the worker has under the age of 4 and prevents the balance going above the annual limit of 5 days per child.

Steps

1. Access the Create Time Off Plan task.
2. Enter or select these values and click OK.

Field	Value
Name	*Parental Leave Time Off Plan*
Track Balance	*Yes*
Balance Period	*YTD - Current Calendar Year (based on Period End Date)*
Period Schedule	*Monthly*
Unit of Time	*Days*
Effective Date	*01/01/2019*

3. On the Balance tab, enter or select these values.

Field	Value
Balance Visibility	*Eligible in period (based on As of Date)*
Calendar Display	*Plan*
Date	*Balance Period Start Date*

4. On the Calculation tab, enter or select these values.

Field	Value
Accrual Frequency Method for Time Off Plan	*Start of Period*
Time Off Plan Balance for Lower Limit	*0*
Time Off Plan Balance for Upper Limit	*Parental Leave Upper Limit*

Field	Value
Daily Quantity Default	*1*
Days to Include	*Workdays (Non-Holiday)*

5. On the Accrual tab, click Add Row and select *Parental Leave Accrual*.
6. On the Time Off tab, click Add Row and select Create Time Off.
    a) Enter or select these values:

Field	Value
Name	*Parental Leave Time Off*
Code	*parental_leave_time_off*

    b) From the Time Off Type prompt, select Create Time Off Type. For Name, enter *Parental Leave*, and click OK.
    c) For Entry Option, select *Enter through Time Off Only*.
    d) On the Details tab, for Priority, enter *2*.
    e) Click OK.
7. On the Eligibility tab, click Add Row in the Worker Eligibility grid and select *Worker Has Dependent Under 4 as of Period End Date*.
8. Click OK.

Next Steps

Example: Create an Absence Balance

Example: Create an Absence Balance

This example illustrates how to create an absence balance to calculate the balance for a parental leave time off plan as of the prior calendar month.

Context

You'll use the absence balance calculation later when creating the accrual adjustment calculation.

Prerequisites

Example: Create a Time Off Plan for Parental Leave.

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

Steps

1. Access the Create Absence Balance task.
2. Enter or select these values:

Field	Value
Name	*Parental Leave Time Off Plan Balance as of Prior Calendar Month*
Absence Calculation	*Parental Leave Time Off Plan*
Balance Period	*MTD - Prior Calendar Month (based on Period End Date)*
Calculate as of Balance Period End Date	*Yes*

3. Click OK.

Next Steps

Example: Configure an Accrual Adjustment for Parental Leave

Example: Configure an Accrual Adjustment for Parental Leave

This example Illustrates how to configure a series of nested calculations for an accrual calculation value to adjust the balance for a time off plan for parental leave. This top-level arithmetic calculation (*Parental Leave Adjustment*) enables Workday to subtract the plan balance as of the prior calendar month from the parental leave upper limit as an accrual adjustment.

Context

You'll create 8 separate calculations that together feed into the final result for the top-level calculation. These calculations include 2 scheduling rules that adjust the accrual for periods in which a worker's entitlement reduces. The adjustment occurs when the worker's time off plan balance, as of the end of the prior period, is above the upper limit that they're entitled to, as of the current period start date. In these instances, the accrual awards a negative value to bring the balance down to the upper limit of the time off plan:

- Prior Period End Date
- Dependent Age at Prior Period End Date
- Dependent Age < 4 as of Prior Period End Date
- Dependent Age is GTE 0 and < 4 as of Prior Period End
- CC Dependent Age < 4 as of Prior Period End Date
- Number of Dependents Under 4 as of Period End Date
- Number of Dependents Under 4 as of Prior Period End Date
- Number of Dependents Under 4 as of Period End Date < Prior Period Value
- Parental Leave Time Off Plan Balance as of Prior Calendar Month > Upper Limit Value
- Parental Leave Adjustment

Prerequisites

Example: Create an Absence Balance

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

Steps

1. Prior Period End Date

   Create a calculation to determine the end date of the prior period, using a Workday-owned instance value calculation (IVC).

   a) Access the Create Date Increment/Decrement Calculation task.

   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Prior Period End Date*
Category	*Absence*
Start Date	*Period: Period Start Date*
Day	-1

2. Dependent Age at Prior Period End Date

   Create a calculation to return the dependent's age at the end of the prior period, using an IVC and the result of the previous calculation.

   a) Access the Create Date Difference Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Age at Prior Period End Date*
Category	*Absence*
Interval	*Year*
Start Date	*Dependent: Date of Birth*
End Date	*Prior Period End Date*

3. Dependent Age < 4 as of Prior Period End Date

   Create a calculation to determine whether the dependent's age is less than 4 as of the end of the prior period, using the result of the previous calculation.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Age < 4 as of Prior Period End Date*
Category	*Absence*
1st Operand	*Dependent Age at Prior Period End Date*
Operator	*less than*
2nd Operand	*4*

4. Dependent Age is GTE 0 and < 4 as of Prior Period End

   Create a calculation to determine whether the dependent's age is greater than or equal to zero and less than 4 as of the period end date.

   a) Access the Create Logic Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Dependent Age is GTE 0 and < 4 as of Prior Period End*
Category	*Absence*
Operator	*AND*
Calculation	*Dependent Age < 4 as of Prior Period End Date*
	Dependent Date of Birth Exists in Period or Prior Period

5. CC Dependent Age < 4 as of Prior Period End Date

   Create a calculation to check that the dependent's age is under 4 as of the prior period end date, using the previous calculation as a condition, and returning a result if the condition is true.

   a) Access the Create Conditional Calculation task.
   b) Enter or select these values:

Field	Value
Name	*CC Dependent Age < 4 as of Prior Period End Date*
Category	*Absence*
Order	*a*
Condition	*Dependent Age is GTE 0 and < 4 as of Prior Period End*
Result	*1*
Default Response	*0*

6. Number of Dependents Under 4 as of Period End Date

   Create a calculation to determine the number of dependents under the age of 4 as of the end of the period by aggregating the results of the previous calculation.

   a) Access the Create Aggregate Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Number of Dependents Under 4 as of Period End Date*
Category	*Absence*
Function	*Sum*
Operand	*CC Dependent Age < 4 as of Period End Date*
Instances for Operand Calculation	*Dependents*

7. Number of Dependents Under 4 as of Prior Period End Date

   Create a calculation to determine the number of dependents under the age of 4 as of the end of the prior period by aggregating the result of the previous calculation.

   a) Access the Create Aggregate Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Number of Dependents Under 4 as of Prior Period End Date*
Category	*Absence*
Function	*Sum*
Operand	*CC Dependent Age < 4 as of Prior Period End Date*
Instances for Operand Calculation	*Dependents*

8. Number of Dependents Under 4 as of Period End Date < Prior Period Value

   Create a calculation for the scheduling rule for the accrual adjustment that checks whether the number of dependents under the age of 4 as of the period end date is less than the prior period.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Number of Dependents Under 4 as of Period End Date < Prior Period Value*
Category	*Absence*
1st Operand	*Number of Dependents Under 4 as of Period End Date*
Operator	*less than*
2nd Operand	*Number of Dependents Under 4 as of Prior Period End Date*

9. Parental Leave Time Off Plan Balance as of Prior Calendar Month > Upper Limit Value

   Create another calculation for the scheduling rule for the accrual adjustment. The rule determines whether the balance of the time off plan as of the prior period is greater than the time off plan's upper limit.

   a) Access the Create Value Comparison Calculation task.
   b) Enter or select these values and click OK and Done.

Field	Value
Name	*Parental Leave Time Off Plan Balance as of Prior Calendar Month > Upper Limit Value*
Category	*Absence*
1st Operand	*Parental Leave Time Off Plan Balance as of Prior Calendar Month*
Operator	*greater than*
2nd Operand	*Parental Leave Upper Limit*

10. Parental Leave Adjustment

    You can now create the top-level calculation for the accrual Calculation value using the previous calculation that ties all of the results together.

    a) Access the Create Arithmetic Calculation task.
    b) Enter or select these values and click OK and Done.

Field	Value
Name	*Parental Leave Adjustment Calculation*
Category	*Absence*
1st Operand	*Parental Leave Upper Limit*
Operator	*Subtract*
2nd Operand	*Parental Leave Time Off Plan Balance as of Prior Calendar Month*

Next Steps

Example: Add an Accrual Adjustment to the Plan

Example: Add an Accrual Adjustment to the Plan

This example illustrates how to add an accrual adjustment to the time off plan.

Context

You'll add the accrual adjustment that you configured in the previous example.

Prerequisites

Complete these examples:

- Example: Configure a Parental Leave Upper Limit
- Example: Configure an Accrual for Parental Leave
- Example: Create a Worker Eligibility Rule for Parental Leave
- Example: Create a Time Off Plan for Parental Leave
- Example: Create an Absence Balance
- Example: Configure an Accrual Adjustment for Parental Leave

Security:

- *Set Up: Calculations - Generic* domain in the Core Payroll functional area.
- *Set Up: Time Off* and *Set Up: Time Off (Calculations - Generic)* domains in the Time Off and Leave functional area.

Steps

1. Access the Edit Time Off Plan task.
2. From the Time Off Plan prompt, select *Parental Leave Time Off Plan* and select the *Update Existing Effective Date* option, and then *01/01/2019*.
3. Click OK.
4. On the Accrual tab, click Add Row.
5. In the Adds to Balance column, select Create Accrual.
6. Enter or select these values and click OK and Done.

Field	Value
Name	*Parental Leave Adjustment Accrual*
Code	*parental_leave_adjustment_accrual*
Calculation	*Parental Leave Adjustment Calculation*
Priority	*1*
Options	*None*

7. In the Scheduling grid, add 2 rows, and enter or select these calculations:
   - *Number of Dependents Under 4 as of Period End Date < Prior Period Value*
   - *Parental Leave Time Off Plan Balance as of Prior Calendar Month > Upper Limit Value*

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

Examples

Set Up Mail Servers for Email Notifications

Set Up Mobile Push Notifications

Create Email Templates

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.
Comment	The comment that's associated with the time off entry. The comment is visible on the Details tab of the *Request Time Off* business process event. When users enter a time off request for multiple days, they can enter a different comment for each day.

Option	Description
	You can hide this field for all users or specific security groups by accessing the Configure Optional Fields task, and selecting the: • Request Time Off functional area. • *Time Off Entry Comment* field. See Hide or Require Optional Fields.
Comment to Approver	The comment that's associated with the *Request Time Off* business process. The comment is visible to the approver and on the Process tab of the *Request Time Off* business process event.

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 2432

Examples

2025R1 Feature Release Note: Hide Comment Field on Time Off Entries

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

Examples

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.

Option	Description
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 2435

Concept: Balance Projections for Time Off on page 2528

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 2528

Examples

Set Up Mass Operations

Concept: Importing Time Off Request Events

You can load large volumes of new 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 new time off request events, Workday recommends that you:

- Use this web service for performant data loads when the batch exceeds either:
    - 100 time off requests against an absence table.
    - 1,000 requests directly against a time off type or plan.
- 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
Examples

Set Up Inbound EIB

Launch EIB Spreadsheet Upload

Example: Bulk Load Time Off Requests into Workday on page 2395

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 2431

Correct Approved Time Off Requests on page 2432

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 2432

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.
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

Business Process	Considerations
Buy Time Off	Enables: • Workers to buy time off. • Editable documents to be dynamically generated when a worker buys 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

<table>
<tr><th>Reports / Report Fields / Tasks</th><th>Considerations</th></tr>
<tr><td>Report Fields</td><td>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.</td></tr>
<tr><td>Report Data Source (RDS) and RDS Filter</td><td>
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.
</td></tr>
</table>

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 2340.

   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.
   a) Create a default definition for the *Buy Time Off* business process.
   b) (Optional) To dynamically generate editable documents when workers buy time off, add a *Generate Document* action step to the *Buy Time Off* business process. See Steps: Set Up Document Generation for Absence Business Processes on page 2230.
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 2443.

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*. 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

Option	Description
	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 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:

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Type of Time Off</td><td> 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.</td></tr>
<tr><td>Hours or Days</td><td>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.</td></tr>
<tr><td>Note</td><td> 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.</td></tr>
</table>

Option	Description
	• 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: Set Up Time Offs on page 2278.

   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. • *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:

Option	Description
	• *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 2302.

   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.
   a) Configure a default definition for the *Sell Time Off* business process.
   b) (Optional) To dynamically generate editable documents when workers sell time off, add a *Generate Document* action step to the *Sell Time Off* business process. See Steps: Set Up Document Generation for Absence Business Processes on page 2230.
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 2302

Adjust Time Off for Worker on page 2456

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 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

Question	Consideration
	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. 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

Question	Consideration
	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. • 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. • Editable documents to be dynamically generated when users adjust time off for a worker.
Change Job	Workday recommends that you add an *Automated Accrual 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.
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 2258
Setup Considerations: Time Off on page 2266
Setup Considerations: Absence Tables on page 2466
Setup Considerations: Accrual Adjustments and Overrides on page 2498
Tasks
Create Time Off Plans That Track Balances on page 2302
Steps: Set Up Time Offs on page 2278
Create Time Off Validations on page 2298
Evaluate Absence Eligibility on page 2640
Recalculate Balances for Workers on page 2526
Steps: Transfer Time Off Balances on page 2515

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.
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 2459

Concept: Accrual and Time Off Limits on page 2355

Tasks

Steps: Set Up Time Offs on page 2278

Create Time Off Plans That Track Balances on page 2302

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 2319

Tasks

Steps: Enable Termination Adjustments for Time Off Plans on page 2282

Adjust Time Off for Worker on page 2456

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.

Forfeiture Adjustments

Concept: Forfeiture Adjustments

With the Time Off Forfeiture Adjustments Process, Workday generates forfeiture adjustments that pay out unused, expiring accruals.

Initial Forfeiture Adjustment Creation

For time off plans with the Time Off Forfeiture Adjustment field defined, the Time Off Forfeiture Adjustment Process (also referred to as the scheduled job) automatically runs on the last day of the time off period to create forfeiture adjustments for expiring accruals that are forfeited in the current period and the previous 3 periods. The Maintain Time Off Forfeiture Adjustment Settings task gives you the option to change the number of prior periods evaluated as part of the scheduled job.

Automatic Recalculation Process

Workday runs a background process every 15 minutes that automatically recalculates forfeiture adjustments for changes up to 12 months back. This is triggered by the following retroactive changes:

- Approved Time Off Request or Correction
- Approved Time Review Event
- Accrual Adjustment, Accrual Override or Time Off Adjustment
- Accrual Expiration Override

When a change is observed, the system updates only the amount on the adjustment and deletes any adjustments that are no longer valid for an expiring accrual.

Ad-Hoc Forfeiture Adjustments

You can use the Run Time Off Forfeiture Adjustment Process task (secured to the *Process: Time Off Forfeiture Adjustment* domain) to create and recalculate forfeiture adjustments for a subset of workers on an ad-hoc basis. As an administrator, you can use the ad-hoc job to make changes for those circumstances that you want to take more immediate action on, such as when a change isn't observed, or you have items that need to be expedited to payroll.

Troubleshooting and Error Handling

These automated processes include built-in retry and error handling mechanisms to reduce the need for manual intervention.

If the Time Off Forfeiture Adjustment Process fails on a period end date, Workday automatically attempts to re-run the job for the next three consecutive days. If the job still fails after three retries, the most likely cause is an issue with calculating time off plan balances. To fix this, you should:

- Troubleshoot the time off plan's setup and configuration. A significant number of calculation errors often indicate a configuration problem, which might show up as a stack trace error for many workers.
- Manually relaunch the job using the Run Time Off Forfeiture Adjustment Process task and select the Use Dates from Last Scheduled Run checkbox to resume the process from where it left off.

  Note: If you don't select the Use Dates from Last Scheduled Run checkbox, automatic calculations won't resume until the next scheduled run.

To prevent system performance issues, Workday stops an Automatic Recalculation job run running the 15 minute background process if it reaches a specific failure threshold. For a specific worker and time off plan, Workday attempts to recalculate the failed records up to three additional times before disabling automatic recalculations for the worker.

You can identify these disabled records by running the Workers with Automatic Recalculation of Time Off Forfeiture Adjustments Disabled report.

To reprocess these records, you must manually launch the Run Time Off Forfeiture Adjustment Process task and select the Recalculate only checkbox. If no action is taken, Workday attempts to recalculate these records during the next scheduled job run.

Related Information

Concepts

Concept: Accrual Expiration on page 2358

Tasks

Steps: Enable Forfeiture Adjustments for Time Off Plans on page 2463

Reference

FAQ: Forfeiture Adjustments on page 2464

Steps: Enable Forfeiture Adjustments for Time Off Plans

Prerequisites

- Configure the time off plan to track balances.
- Add at least 1 accrual with expiration to the time off plan.

Context

You can create time offs enabled for forfeiture adjustment and configure time off plans to automatically pay out unused, expiring accruals.

Steps

1. Access the Create Time Offs task.
    a) Select the Enable for Forfeiture Adjustment checkbox.
    b) On the Forfeiture tab, select a Forfeiture Type of Expiring Accruals.

       Note: When setting the Priority on the Details tab, Workday recommends giving the forfeiture time off the lowest priority (highest number). This ensures it's processed after all other time offs on the time off plan.
2. Access the Create Time Off Plan or Edit Time Off Plan task.
    a) On the Time Off tab, add the time off to the plan.
    b) Select the time off as the Time Off for Forfeiture Adjustment.

       Note: You cannot define the Time Off for Forfeiture Adjustment field on a past dated time off plan snapshot. This field automatically populates once you add a forfeiture time off to your time off plan definition.
3. Access the Domain Security Policies for Functional Area report and select Time Off and Leave as the functional area.
    a) Enable the domain security policy *Process: Time Off Forfeiture Adjustment*.
    b) Edit Permissions to grant user based security groups access to functionality related to the Time Off Forfeiture Adjustment Process.
    c) Activate Pending Security Policy Changes.
4. *(Optional)* Access the Maintain Time Off Forfeiture Adjustment Settings task to define the number of past periods the scheduled job evaluates when creating new forfeiture adjustments.

Result

Workday creates and recalculates forfeiture adjustments that take effect on the accrual expiration date and are visible to administrators on the:

- Forfeiture Adjustments tab of the Maintain Accrual and Time Off Adjustments/Overrides task.

  Note: Deleted forfeiture adjustments won't display on the Forfeiture Adjustments tab. If no forfeiture adjustments exist, this tab is hidden.
- Time Off Forfeiture Adjustments for Workers report.

Next Steps

Map the Absence Component Related Calc (ACRC) of the forfeiture time off to an Earning or External Earning for payout.

- If using Workday Payroll, access the Create Earning or Edit Earning task.
- If using Third-Party Payroll, access the Create External Earning or Edit External Earning task.

Related Information

Concepts

Concept: Forfeiture Adjustments on page 2461

Concept: Accrual Expiration on page 2358

Tasks

Create Time Off Plans That Track Balances on page 2302

Steps: Set Up Time Offs on page 2278

Reference

FAQ: Forfeiture Adjustments on page 2464

FAQ: Forfeiture Adjustments

What absence components can be paid out at this time?	Only expiring accruals that have been forfeited can be paid out. At this time the Time Off Forfeiture Adjustment Process doesn't support the automatic payout of expired carryover, forfeited carryover, or forfeited accruals in excess of an upper limit.
Can I specify which expiring accrual I wish to pay out on a time off plan?	No, you cannot specify which expiring accrual to payout. However, if you have a need to only payout a subset of workers, you can configure an eligibility override on the forfeiture time off so that the job only pays out for a subset of workers.
Do time offs enabled for forfeiture adjustment respect lower limits?	Yes, forfeiture time offs respect time off plan lower limits and time off limit overrides. However, we recommend avoiding a positive lower limit configuration when possible. If the forfeiture adjustment amount is greater than the lower limit, expiring accrual units that exceed the limit will appear in the Time Off Unpaid in Period column instead of the Expiring Accrual Forfeited in Period column in reports like Time Off Results by Period. While the results are still correct, this can create a perceived discrepancy, making it seem like the balances don't add up correctly.
I updated the reference date of an accrual adjustment for an expiring accrual that was previously paid out. Why am I not seeing a forfeiture adjustment that reflects this change?	In the event of changes to the Reference Date (Accrual Date), Workday deletes the forfeiture line item during the recalculation process and will create a new forfeiture adjustment the next time the scheduled job runs.
I used the Maintain Accrual Expiration Override task to update the expiration date of an expiring accrual, which was previously paid out. Why am I not seeing a forfeiture adjustment that reflects this change?	For observed changes impacting the Expiration Date of an Accrual, Workday deletes the forfeiture line item during the recalculation process and will create a new forfeiture adjustment the next time the scheduled job runs.
A worker has a Floating Holiday Accrual that expired on 8/29/2025. On 9/22/2025, I updated the Floating Holiday Time Off Plan, which has a monthly period schedule, to include the necessary forfeiture time off setup, effective 9/1/2025. My Time Off Forfeiture Adjustment Settings are configured to evaluate the prior 3 periods, I expected the job	When evaluating which prior periods to create forfeiture adjustments for, Workday's scheduled job will always consider both the first time off plan snapshot with a Time Off for Forfeiture Adjustment defined and your Time Off Forfeiture Adjustment Settings (which define the number of prior periods the scheduled job evaluates when creating new

to create adjustments for the 3 periods preceding September. Why wasn't a forfeiture adjustment created when the Time Off Forfeiture Adjustment Process ran on 9/30/2025?	forfeiture adjustments). Workday considers the maximum of these two dates when creating new forfeiture adjustments.
A worker, Ben Adams, has a Floating Holiday Accrual that expired on 8/5/2025. On 9/22/2025, I updated the Floating Holiday Time Off Plan (which has a monthly period schedule) to include the necessary forfeiture time off setup up, effective 9/1/2025. Why wasn't a forfeiture adjustment created by running the Run TIme Off Forfeiture Adjustment Process with the below inputs on 9/29/2025?	• ***Time Off Plan: Floating Holiday*** • ***Workers to Include: Ben Adams*** • ***Start Date: 8/1/2025*** • ***End Date: 9/30/2025***
I thought that the ad-hoc job would create adjustments for the prompted date range?	When evaluating which prior periods to create forfeiture adjustments for, Workday's ad-hoc job will always consider both the first time off plan snapshot with a Time Off for Forfeiture Adjustment defined and the prompted Start Date. Workday considers the maximum of these two dates when creating new forfeiture adjustments.
I accrued 8 Floating Holiday hours on 7/4/2025. I used 3 of these Floating Holiday hours to take time off on 8/15/2025, and the remaining 5 hours expire on 9/4/2025. On 9/22/2025 I updated my Floating Holiday Time Off Plan (which has a monthly period schedule) to include the necessary forfeiture time off setup up, effective 9/1/2025. When the Time Off Forfeiture Adjustment Process ran on 9/30/2025, it created a forfeiture adjustment to payout the unused hours, as expected. However, on 10/5/2025, I corrected my 8/15/2025 Floating Holiday entry from 3 to 2 units. Why am I not seeing this correction reflected as part of the recalculation process?	Workday's automatic recalculation process considers both the first time off plan snapshot with a Time Off for Forfeiture Adjustment defined and the 12 month recalculation guardrail. The maximum of these two dates is the date in which Workday will recalculate existing forfeiture adjustments from.
What time does the Time Off Forfeiture Adjustment Process run on the last day of the absence period?	This job runs at 3:20 AM local tenant time Sunday – Friday. On Saturdays it runs at 2:15 PM local tenant time. Local tenant time is based on the default time zone configured in Edit Tenant Setup - System task. If the time zone setting is blank, Workday will use Pacific Time.
Where can I view the status of a scheduled job run?	You can verify the status of a scheduled job run using the Workday-Delivered Find Time Off Forfeiture Adjustment Runs for Scheduled Background Process report as well as via the Process Monitor.
Can the Ad-Hoc Run Time Off Forfeiture Adjustment Process be scheduled?	No, not at this time. This ad-hoc task is meant to be used in special circumstances when you need to take more immediate action, such as when a change isn't observed, or you have items that need to be expedited to payroll.

My organization has had a policy change and no longer requires expiring accruals to be paid out as of 1/1/2026 (Enabled Forfeiture Adjustment on the 9/1/2025 snapshot). Will I need to create a new time off plan?	No, you do not need to create a new time off plan. You can remove time off from the Time Off for Forfeiture Adjustment field on the payout section of your time off plan. If you want to continue recalculating (updating/deleting) forfeiture adjustments that were previously created, create a new time off plan snapshot for 1/1/2026 and remove the time off defined in the Time Off for Forfeiture Adjustment field. If you no longer want to support the recalculation of existing forfeiture adjustments, edit the 9/1/2025 snapshot on 1/1/2026 and remove the time off defined in the Time Off Forfeiture Adjustment field.

Related Information

Concepts

Concept: Forfeiture Adjustments on page 2461

Concept: Accrual Expiration on page 2358

Tasks

Steps: Enable Forfeiture Adjustments for Time Off Plans on page 2463

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 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

Question	Considerations
	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
Examples
Steps: Set Up Absence Third-Party Calendar Integration
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. • 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):

Option	Description
	• 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 2479.

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 or Manage Absence tasks).
   - *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 the check boxes that apply, depending on the Entry Option value. This table indicates whether you can select each one for days or hours-based absence tables.

Check Box	Description	Entry Option	Days-Based	Hours-Based
Display Start and End Time	To enable workers to enter start and end times for time off requests.	*Enter through Time Off Only*	Yes	Yes
		Enter through Time Time Tracking Only	No	No
		Enter through Time Tracking or Time Off	No	No
Start and End Time Required	To require workers to enter start and end times on time off requests.	*Enter through Time Off Only*	Yes	Yes
		Enter through Time Time Tracking Only	No	No
		Enter through Time Tracking or Time Off	No	No
Calculate Quantity Based on Start and End Time	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	*Enter through Time Off Only*	No	Yes

Check Box	Description	Entry Option	Days-Based	Hours-Based
	the start time and end time. • Workday ignores the daily quantity default.			
		Enter through Time Time Tracking Only	No	Yes
		Enter through Time Tracking or Time Off	No	Yes
Default Start and End Time from Schedule	To automatically populate the Start Time and End Time fields for each day from the worker's schedule. Workday uses either the worker's published schedule from Workday Scheduling, if one exists, or the worker's assigned work schedule calendar. If neither exists, Workday leaves the start and end times empty.	*Enter through Time Off Only*	Yes	Yes
		Enter through Time Time Tracking Only	No	Yes
		Enter through Time Tracking or Time Off	No	Yes
Enable Crossing Midnight	To enable workers to enter time off that starts and ends on consecutive days. This enables Workday to process time off requests that cross midnight as a single time off entry.	*Enter through Time Off Only*	Yes	Yes
		Enter through Time Time Tracking Only	No	Yes
		Enter through Time Tracking or Time Off	No	Yes

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. 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
Examples
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	07:03:28

Time Off Plan Complexity	Example	Average Execution Time
	12-month period for expired accruals and restores them to the employee's balance.	
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 2352

Override Time Off Plan Balances on page 2521

Adjust Time Off for Worker on page 2456

Examples

Troubleshooting: Time Off on page 2548

Example: Define Eligibility for a Time Off Plan on page 2372

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 2466

Concept: Absence Tiers on page 2476

Tasks

Create Absence Tables on page 2470

Configure Absence Occurrences on page 2631

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*

Field	Value
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*
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*

Order	Condition	Result
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: Set Up Time Offs on page 2278

Create Time Off Plans That Track Balances on page 2302

Steps: Create Calendars

Steps: Set Up Absence Occurrences on page 2630

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*

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 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.*
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.*
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* *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.

Option	Description
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*

Field	Value
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*
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

Question	Considerations
	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
Examples

The Next Level: PATT Touchpoints with Assignments

The Next Level: Absence Accruals

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.
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.

Option	Description
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

Option	Description
	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 2319

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.
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
Examples
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.

Reports or Dashboards	Considerations
Carryover Balances for Organization (by Carryover Date) Carryover Balances for Organization (by Worker)	View when carryover expires for workers or organizations to plan for resource allocation or budgetary requirements.
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 2498

Tasks

Create Absence Balances on page 2527

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. You must 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*: This step triggers a review of the HR change and determines if there are any effects on time off eligibility. Example: If a job change is a location change and plan eligibility is based on country, Workday sends a My Tasks notification to the configured security groups. The notification includes the previous time off plan and balance as well as the new plan the worker is eligible for. If there are no effects on time off plans eligibility, Workday doesn't send a notification
    - *Update Time Off Requests*.: This step triggers a review of the HR change and determines the impact on any existing time off requests. If a user has submitted a time off request after the effective date of the HR change, Workday notifies the configured security groups. The notification includes a list of the time off requests so that you can update the requests accordingly. If the HR change doesn't affect any time off requests, Workday doesn't send a time off notification

    You can add these steps in any order to the business process as long as they occur after the completion step. See Edit Business Processes.

2. (Optional) Access the Maintain Time Off Unit of Time Conversion Calculations task if your organization uses time off plans with different units of time.

   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. If your organization only uses time off plan with the same units,

   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) On the Balance tab, select a Balance Transfer Default(s).

      You can select time off plans that you want the balance transfers to default to. Values default if there's a 1 to 1 relationship between the previous time off plan and that plan that you select here. If the previous time off plan has a current balance and carryover balance, the combined balance defaults into the current balance of the balance transfer default plan. It's important to consider how your organization configures the eligibility of time off plans. Example: Your organization might configure eligibility by location. Eligibility rules on the time off plan determine which plan acts as the default for the transfer.
   c) On the Time Off tab, select a Time Off for Balance Transfer Adjustment. Select time offs that Payroll can pay out to the worker, if needed, when the worker isn't eligible for any other time off plan.

   See Create Time Off Plans That Track Balances on page 2302.
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. (Optional) Access the Time Off Balance report for a worker to view their time off plan balances:
   a) Review each time off plan that they're eligible for. On the Balance tab of each time off plan, note whether there are any time off plans listed in the Balance Transfer Defaults column.
   b) On the Time Offs tab, note whether there are any time offs in the Time Off for Balance Transfer Adjustment column. If you decide to pay out this plan during a transfer, Workday uses this time off to zero-out the plans balance.
6. 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.
7. 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 2533

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. Workday creates an accrual adjustment when it detects a change in what the worker accrues based on a calculation within an accrual. Example: An accrual calculation previously returned 40 hours for a worker, but as a result of a staffing event, the accrual calculation now returns 32 hours.

See Set Up Rule Based Consolidated Templates for Job Changes on page 859 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 2348.

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 2302.

   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

Adjustment	Calculation
	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 859.
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 2350.

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. (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 2537

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 2354.
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

Field	Description

	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 2319

Setup Considerations: Period Schedules on page 2334

Tasks

Create Time Off Plans That Track Balances on page 2302

Reference

FAQ: Time Off Balances on page 2538

Examples

Example: Define Eligibility for a Time Off Plan on page 2372

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 2530

Reference

FAQ: Time Off Balances on page 2538

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 2530

Tasks

Manually Schedule Storage of Time Off Balances on page 2522

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 2530

Tasks

Steps: Set Up Job Changes on page 844

Reference

FAQ: Time Off Balances on page 2538

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 2302

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. Available time off = Accrued time - (Approved + Pending time off requests). Requests with a status of Saved for Later don’t display.

Field	Description
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 2538

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 2522

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.

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*

Type	Specify	Group
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. Launch the Start Job Change initiating action.

    Change Alan's work location from San Francisco to Copenhagen:

Field	Value
When do you want this change to take effect	*02/16/2020*
What do you want to do?	*Change Location*
Where will this person be located after this change	*Copenhagen*

Field	Value
Employee Type	*Regular*
Time Type	*Full Time*
FTE	*100%*
Company	*Global Modern Services (Denmark)*
Region	*EU-Northern*

See Reference: Change Job Initiation.

19. Access the Maintain Time Off Plan Transfer Balances task from My Tasks.
    a) Select the worker and the time off balance transfer event that results from the *Change Job* business process.
20. On the left panel, click the USA Paid Time Off Plan (Salaried) tab.

    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*.
21. On the left panel, click the Floating Holiday Plan tab.
22. 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*
23. Enter *0.25* (Days) Units to Payout in the Payout Adjustment section.
24. On the left panel, click the USA Sick Plan tab.
25. 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*
26. On the left panel, click the USA Vacation Plan tab.
27. 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*
28. 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 2515

Change Location on page 824
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 2519

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

Activity	Accrual Frequency Method: Start of Period	Accrual Frequency Method: End of Period
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
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 2519

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 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 2302.

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 2530 and Manually Schedule Storage of Time Off Balances on page 2522.
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 2282.
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 2530 and Manually Schedule Storage of Time Off Balances on page 2522.
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 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 2526.	Yes.
Absence-related transactions, such as time off requests or corrections.	Yes.	Not applicable. In this case, Workday doesn't need to recalculate balances.

Retroactive Change Type	Effective Before Worker's Last Stored Balance Date	Effective After Worker's Last Stored Balance Date
		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 2528

Concept: Guidelines for Storing Time Off Balances on page 2530

Tasks

Override Time Off Plan Balances on page 2521

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.
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
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 2550
- Workers with service date changes lose their previously accrued time off. on page 2550
- 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 2552
- Worker data includes invalid absence records. on page 2553
- Absence table tier results in unpaid time off when a lower-priority absence tier has sufficient balance. on page 2553
- Inconsistent results showing for workers on the Time Off Results by Period report on page 2553

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. 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.

Cause	Solution
	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. 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.

Cause	Solution
	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 2319
Concept: Guidelines for Storing Time Off Balances on page 2530
Tasks
Create Period Schedules for Time Off on page 2338
Create Time Off Plans That Track Balances on page 2302
Create Accruals on page 2340
Steps: Set Up Time Offs on page 2278
Create Time Off Plan Overrides for Time Offs on page 2505
Examples
Example: Define Eligibility for a Time Off Plan on page 2372
Example: Create a 90-Day Waiting Period for Accruals on page 2384
Example: Configure Accruals Relative to Hire Date and Years of Service on page 2386

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: • 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.

Question	Consideration
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 view the reason usage count in your reports to predict trends and plan resources.

Question	Consideration
	• Configure additional fields that a worker completes when entering a leave of absence request. You can use Workday-delivered fields or add custom fields and label overrides for these fields. 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

Question	Consideration
	workers enter leave requests that exceed their leave balance.
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.

Question	Consideration
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. • 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 2243.

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 the:
  - *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.
  - *Set Up: Maintain Additional Fields* domain in the System functional area can add, change, remove, and view additional fields for Absence in Workday.
- 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. • Dynamically generate editable documents 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.

Business Process	Considerations
	• 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. • Enable editable documents to be dynamically generated when a worker requests a return from a leave of absence.
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.

Reports or Dashboards	Considerations
	• 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.
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 2602

Setup Considerations: Pay for Workers on Leave

Tasks

Create Leave Types on page 2568

Reference

Reference: Leave Impacts on page 2607

The Next Level: PATT Touchpoints with Assignments

Examples

Example: Set Up Parental Leave on page 2591

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.
   a) To send leave requests for review and approval, configure these business processes:
      - *Request Leave of Absence*
      - *Request Return from Leave of Absence*
   b) (Optional) To dynamically generate editable documents when workers request leave of absence or request return from leave of absence, add a *Generate Document* action step to the *Request Leave of Absence* or *Request Return from Leave of Absence* business process. See Steps: Set Up Document Generation for Absence Business Processes on page 2230.
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 2566.
4. Create Leave Types on page 2568.
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 2602

Concept: Dashboards for Time Tracking and Absence on page 2910

Concept: Coordinated Leaves and Time Off on page 2600

Setup Considerations: Absence Calendar Experience on page 2237

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

Segment-Based Security Group	Access Leave Type (Segmented) Domain Access	Associated with a Segment	Leave Type	Considerations
				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 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 2578
Example: Require Workers to Use Time Off Before FMLA on page 2579

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). Workday enables you to configure multiple jobs positions for: • Contingent workers. • Employees. 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

Field	Description
	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.
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.
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.

Field	Description
	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 • 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:

Field	Description
	• *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. Example: Select: • *Leave Percentage* to enable workers to enter a percentage of leave units. Workday uses this value if you enable proration on the Balance/Leave Taken tab. • *Child's Birth Date* or *Expected Due Date* to enable workers to provide information required for maternity or paternity leave. Example: When workers request UK Statutory Maternity Leave, they must report the child's expected due date. If you can't find a field that you require, consider creating a custom additional field using the Maintain Additional Fields task. Once created, you can then select the custom field in the Additional Fields grid. Security: *Set Up: Maintain Additional Fields* domain in the System functional area. You can also use the information captured in these fields to create leave of absence rules: • For validations and supporting data.

Field	Description
	• 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. Enter a Label Override if you want to display a different name for the additional field on the Request Absence task. Workday displays the label override for the field on the leave event instead of the field name. 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 Employee 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. 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 2302

Create Statutory Leave Types for UK Payroll

Reference

Examples

Copy Leave Types

Prerequisites

- Create leave types.
- Security: *Set Up: Leave of Absence* domain in the Time Off and Leave functional area.

Context

You can create new leave types by duplicating existing types and their configuration values into new instances that you can rename and reuse. This allows you to:

- Avoid error-prone manual processes, as you no longer need to recreate leave types from scratch.
- Accelerate implementation time.

Steps

1. Access a report that displays leave types. Example:
    - All Leave of Absence Types
    - Leave Results for Organization
    - Leave Results for Worker
    - View Leave Type
2. From the related actions menu of the leave type, select Leave Type > Copy.

    Workday copies everything in the configuration except for these values:
    - Leave Type ID
    - Intermittent Time Offs
    - Cascading Leave

    You can configure these values immediately on the Copy Leave Type task, or later on the Edit Leave Type task, if needed. See Create Leave Types on page 2568.
3. (Optional) Workday automatically populates the Leave Type field by appending *(Copy)* to the name of the existing leave type. You can edit the value to rename the new leave type instance.
4. Click OK.

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

Option	Description
	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.

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 2602

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 2568.
- 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*
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 2568

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*
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.

Field	Description
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 2600

Tasks

Create Leave Types on page 2568

Create Leave of Absence Rules on page 2566

Examples

Example: Display Balances for Plans with Intermittent Time Off on page 2375

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*
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 2597

Tasks

Create Leave Types on page 2568

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*

Field	Value
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*

Field	Value
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* 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 2597

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*

Field	Value
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 2568

Create Leave of Absence Rules on page 2566

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 2604

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 2568

Examples

Example: Set Up Cascading Leave on page 2585
Example: Set Up Supplemental Sick Leave at Reducing Rates of Pay on page 2588

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 2568

Examples

Example: Track Balances for Coordinated Leaves and Time Off on page 2581

Example: Display Balances for Plans with Intermittent Time Off on page 2375

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 2568

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***
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
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
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***
Generate Document	Dynamically generate editable documents when workers access tasks that initiate the configured business processes.	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
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	
Review Leave of Absence	Require one or more roles to approve leave requests.	X	
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
Review Return from Leave of Absence	Require one or more roles to approve requests to return from leave.		X

Related Information

Tasks

Edit Business Processes

Steps: Set Up Automatic Benefit Eligibility Checks on page 1342

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.	
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	

Additional Field	Description	Example
	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.
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	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.

Additional Field	Description	Example
	indicate a value lower than 1 percent.	
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.
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,	

Additional Field	Description	Example
	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 2568

Create Leave of Absence Rules on page 2566

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:	Effect - Absence Accrual

Leave Impact	Description	Report Fields
	• *On Leave as of Period Start Date with Absence Accrual Effect* • *On Leave as of Period End Date with Absence Accrual Effect*	
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. 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,	Effect - Payroll

Leave Impact	Description	Report Fields
	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.	
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
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 2612

Create Leave Types on page 2568
Steps: Configure Additional Reviewers for Competencies on page 1649
Steps: Set Up Feedback on page 1737
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.
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 2568

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

Reference

Reference: Leave Impacts on page 2607

Examples

Create Work Schedule Calendars

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.
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.

Field	Notes
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
Examples

Set Up Inbound EIB

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*
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 2568

Examples

The Next Level: Using Absence to Record Furloughed Leave

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.

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.
    a) Define the steps in the business process definition that are part of the worker reintegration process. See Steps: Configure Business Process Definitions.
    b) (Optional) To dynamically generate editable documents when workers request long-term time off or leave of absence, add a *Generate Document* action step. See Steps: Set Up Document Generation for Absence Business Processes on page 2230.
2. (Optional) Edit Business Processes.
    a) 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.
    b) To dynamically generate editable documents when workers request time off, add a *Generate Document* action step to the *Request Time Off* business process. See Steps: Set Up Document Generation for Absence Business Processes on page 2230.
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.

    Example: Anna's absence case group initiates absence cases after 4 weeks of qualifying absences. Anna requests a qualifying leave of absence today that's 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 2621.
5. Initiate Absence Cases on page 2623.

Result

You can use the Manage Absence Cases report to create, view, and close absence cases for a worker.

Related Information

Examples

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

Questions	Considerations
	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 2466
- Create Absence Tables on page 2470

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.
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.
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

Features	Considerations
	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.
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 2476

Concept: Calculating Leave Taken on page 2600

Tasks

Create Time Off Plans That Track Balances on page 2302

Create Time Off Plans That Don't Track Balances on page 2313

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 2631.
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 2624

Concept: Calculating Leave Taken on page 2600

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.

Option	Description
	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.
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 2624

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*
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*

Prompt Field	Value Type	Value
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. Workday returns results in boolean format where 1 means true and 0 means false. See Reference: Boolean Calculations.

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 2319

Tasks

Steps: Set Up Time Offs on page 2278

Create Accruals on page 2340

Create Time Off Plans That Track Balances on page 2302

Create Time Off Plans That Don't Track Balances on page 2313

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 2319

Tasks

Steps: Set Up Time Offs on page 2278
Create Accruals on page 2340
Create Time Off Plans That Track Balances on page 2302
Create Time Off Plans That Don't Track Balances on page 2313

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 2386
Example: Position-Based Accrual on page 2376

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 2655.
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 2826.

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 2734.
5. Create Time Entry Validations on page 2812.
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 2831 or Select Fields for Payroll Extract.
8. (Optional) Specify how to manage time off.

   See Concept: Time Tracking and Absence Management on page 2834.
9. (Optional) Enable self-service users to use Time Tracking on mobile devices.

   See Steps: Enable Time Tracking for Mobile on page 2645.
10. (Optional) Create custom labels to replace the terms *check in*, *check out*, and their variations.

    You can use custom labels to replace these terms with alternatives that are appropriate for your organization. See:

    - Steps: Set Up Non-English Custom Labels for Time Tracking on page 2647
    - Create Custom Labels.
    - Steps: Set Up Non-English Custom Labels.

Next Steps

You can access the Run Time Configuration Analyzer Tool task to run a process that audits your Time Tracking configuration. Then access the View Time Configuration Analyzer Results report to view configuration information about your tenant including:

- Counts of Time Tracking workers.
- Time calculations.
- Time entry codes.
- Setup objects.

Workday also displays recommendations about how to address inefficiencies in your configuration, such as workers who have multiple work schedule calendars assigned and workers who have exceeded the recommended number of time calculations per worker. You aren't required to make configuration updates based on these warnings. They only reflect Workday recommendations.

Related Information

Reference

The Next Level: All Things: Time Tracking 2023R2

The Next Level: Reporting Foundation Community Guide

The Next Level: Time Tracking Series 2019

The Next Level: A Day in the Life of a Time Tracking Administrator

The Next Level: Innovation Services for Time Tracking

Steps: Enable Time Tracking for Mobile

Context

You can enable self-service users to use Time Tracking features on mobile devices so they can:

- Check in and out.
- Be prevented from checking in or out if they're outside of a defined work location.
- Enter comments and select time types and worktags for check-in events.
- Receive reminders to check in and out.
- Respond to attestation questionnaires about their meals and breaks when checking in or at the end of their shift.
- Select reasons for check-out events.

When you use Workday Scheduling in addition to Time Tracking, you can enable managers to monitor and take action on daily time exceptions, such as late check-ins, from their mobile devices.

Steps

1. Edit Domain Security Policies.

   Activate and configure these domain security policies:

   - *Self-Service: Time Clock*.
   - *Self-Service: Time Calendar* or *Self-Service: Time Tracking High Volume*.
   - *Self-Service: Work Schedule*.
2. (Optional) Edit Business Process Security Policies.

   To use high-volume time entry, configure the *Enter Time* business process security policy to add relevant security groups to at least 1 of these domains:

   - *Enter Time*
   - *Time Block Micro-edit*
3. Enable standard mobile check-in.

   When you disable standard mobile check-in, workers must select a location or project when checking in.

   Note: Workday recommends enabling standard mobile check-in to take advantage of new Time Tracking features. In a future release, enabling standard mobile check-in will be required for mobile time entry.

   a) Access the Edit Tenant Setup - HCM task.

      Security: *Set Up: Tenant Setup - HCM* domain in the System functional area
   b) Select the Enable Standard Mobile Check-In check box.

      As a best practice, only change this setting when workers aren't checked in. If you change the setting while workers are checked in, workers might see a mix of both settings until they check out again.
4. (Optional) Track seconds for mobile users.

   The mobile time clock displays time with seconds for all workers. However, unless you've configured the workers' time entry templates to track seconds, Workday doesn't store the seconds or use them in calculations. As a best practice, track seconds for mobile users to eliminate this discrepancy, and for more accurate calculations.

a) Access the Create Time Entry Template task.

See Set Up Time Entry Templates on page 2673.

b) On the Effective-Dated tab, expand the Time Entry section.

c) Select the Track In and Out times down to the second check box.

5. (Optional) When you use Workday Scheduling and Time Tracking, you can enable managers to view daily time exceptions on the:

   - Attendance tab on the Team Schedule worklet.
   - Today's Attendance card on the mobile home page.

   On the Attendance tab, Workday displays the status of workers based on their schedule in Workday Scheduling. Managers can use their mobile devices to:

   - Call or text workers.
   - Edit time clock events for workers.
   - Enter missing clock events for the workers.
   - View lists of workers who are checked in, not checked in, or not checked out.
   - View the time clock history.
   - View the precise number of hours and minutes a worker is late or over.

   Add user or role-based groups to the *Manager: Time Exception Experience* domain in the Workday Scheduling functional area. Ensure that relevant security groups have access to these existing domains:

   - *Person Data: Work Phone*
   - *Self-Service: Current Staffing Information*
   - *Self-Service: Work Phone*
   - *Time Tracking: Edit Time Clock Event Date and Time*
   - *Worker Data: Add Clock Event*
   - *Worker Data: Edit Time Clock Events*
   - *Worker Data: Public Worker Reports*
   - *Worker Data: View Time Clock Events*

   Managers must access the Team Schedule or Schedule worklet once on mobile before Workday displays the new experience.

   Note: Note: To use this feature, you must have the Workday Scheduling SKU and configure your tenant for Workday Scheduling.

Next Steps

Use the Time Entry Created From report field to report on whether a worker used the Workday mobile application to check in to Workday.

Related Information

Concepts

Concept: Daily Time Exceptions on page 2871

Tasks

Steps: Set Up Meal and Break Validations on page 2808

Steps: Set Up Geofences for Mobile Time Entry on page 2693

Reference

2025R1 Feature Release Note: Connected Experience: Daily Time Exceptions

2024R2 Feature Release Note: Connected Experience: Daily Time Exceptions for Managers

Steps: Set Up Non-English Custom Labels for Time Tracking

Prerequisites

Security: *Custom Label Management for Non-English* domain in the System functional area.

Context

You can configure overrides for terms in a non-English language.

Steps

1. Access the Maintain Non-English Custom Labels task.
2. Configure these values:

Option	Description
User Language	Example: Select *Spanish (Neutral).*
Custom Label Context	Select *Time Core*.

3. Review the custom labels. In the Override Value column, enter the corresponding override value for each Default Value that you want to replace. Example: For the Spanish term *registro de entrada*, enter an equivalent *registro de ingreso* term.
4. Clear the corresponding Disabled check box to activate your non-English custom labels in Workday. Custom labels are disabled by default.
5. Click OK. Workday starts a background process that prepares the custom labels for the Maintain Non-English Custom Label Overrides task and the *Get Non-English Custom Label Overrides* web service.

   You can let the process complete or click Notify Me Later. When you click Notify Me Later, the process must finish running before you can use the Maintain Non-English Custom Label Override task.

   Note: The *Put Non-English Custom Labels* web service also triggers the background process.
6. Click Done.
7. Access the Maintain Non-English Custom Label Overrides task.
8. Configure these values:

Option	Description
User Language	Example: Select *Spanish (Neutral).*
Custom Label	Select the custom label that you want to override. Example: Select *registrar entrada*.

9. Review the proposed values and select either Keep Original or Use Proposed Value. If you want to use all the proposed values, select Use All Proposed Values.
10. Click OK and Done.
11. (Optional) Access the Rebuild Search Index task.

    Rebuild the search index. Workday recommends that you don't rebuild search indexes manually but wait for the Friday server restart, when indexes rebuild automatically.

Example

Your organization uses the Spanish term *registro de ingreso* instead of Workday's default Spanish term *registro de entrada*. You want to replace the term *registro de entrada* with a custom label override of *registro de ingreso*. After you configure overrides, when users sign into Workday with Spanish as their preferred display language setting, Workday displays the term *registro de ingreso* instead of *registro de entrada* on all time-related employee self-service reports and tasks.

Enable Time Administrator Home Worklet

Prerequisites

Security:

- *Process: Time Configuration Analyzer Tool* domain in the Time Tracking functional area.
- *Set Up: Time Tracking* domain in the Time Tracking functional area.
- *Set Up: Calendar* domain in the System functional area.

Context

The Time Administrator Home worklet provides a central location for cards that display frequently used Time Tracking 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 *Time Admin*.
4. Add the Time Admin app.
5. Click Back to Menu.

Related Information
Reference
The Next Level: All Things: Time Tracking 2023R2

Set Up Intelligent Prompt Recommendations for Time Entry

Prerequisites

Security: *Set up: Time Tracking* domain in the Time Tracking functional area.

Context

You can enable machine learning prompt recommendations for the Time Type prompt on these tasks:

- Check In
- Edit and Approve Time
- Enter Time by Type
- Enter Time by Week
- Time Block Micro Edit
- Quick Add

Using prompt recommendations improves data accuracy and efficiency in entering time.

Workday displays recommendations based on the most recently used and most frequently used selections on the prompts.

You don't need to enable Innovation Services to use this feature.

Steps

1. Access the Maintain Machine Learning Prompt Recommendations task.

2. Enter these values:

Option	Description
Filter by Product Area	Select *Time Tracking* and any other product areas for which you want to configure prompt recommendations. Clear the check boxes for any product areas that you don't want to view in the task.
Enter Time by Type	You can enable prompt recommendations for the Time Type prompts on the Enter Time by Type task.
Check In	You can enable prompt recommendations for the Time Type prompts on the Check In task.
Enter Time by Week	You can enable prompt recommendations for the Time Type prompts on the Enter Time by Week task.
Quick Add	You can enable prompt recommendations for the Time Type prompts on the Quick Add task.
Time Block Micro Edit	You can enable prompt recommendations for the Time Type prompts on the Time Block Micro Edit task.

Result

Workday displays the machine learning recommendations either as pills below the prompts you enabled them for or in a Recommended folder on the prompts.

Example

On the Maintain Machine Learning Prompt Recommendations task, you enable recommendations for the Time Type field on the Check In task. Your workers want to enter their check-in details. On the *Time Type* prompt, a list of most commonly used time types display below the field.

Related Information

Reference

Reference: Form Completion Assistant

Concept: Time Tracking Flow

Entering Time

Validating Entered Time

Collecting Time from External Systems

Creating Reported Time Blocks

Creating Calculated Time Blocks

Submitting Time

Approving Time

You select a time entry method and configure time entry codes, time code groups, and time entry templates to control how workers and managers enter time.

Workers can enter time by:

- Checking in and out on the Time worklet.
- Logging time clock events in an external time collection system, imported through a web service.
- Using the Enter My Time report to record time on the time entry calendar.

Managers can enter worker time by using the:

- Enter Time for Worker report.
- Enter Time for Worker task for high-volume time entry.
- Mass Auto-Fill from Schedule task.
- Mass Enter Time report.

You can configure the *Enter Time* business process security policy so that managers, timekeepers, and administrators can enter time on behalf of workers. Workday displays time in the worker's time zone even if a manager in a different time zone enters time for that worker.

Workday runs validations at different points in the time entry process depending on the time entry method and the type of validation. Critical validations prevent workers from submitting the week or time period for approval, while workers can submit time with warning validations.

You can use web services to load time clock events or reported time blocks from external time collection systems into Workday. Use the web service:

- *Put Time Clock Events* to load small batches of time clock events on a frequent basis.
- *Import Time Clock Events* to load large batches of time clock events on an infrequent basis.
- *Import Reported Time Blocks* to load reported time blocks.

Workday matches time clock events to form reported time blocks, which workers can edit and submit using the time entry calendar. A time block identifies the number of hours, in/out times (if applicable), time entry code, and any worktags associated with the time.

Workday assigns time calculation tags to a reported time block based on the time entry code of the time block. Workday uses the time calculation tags to apply calculations to the reported time block to create calculated time blocks. Calculated time blocks identify the calculated quantity of time, time calculation tags applied to the time block, and can also include worktags.

Workers can individually submit time by week or by period from the time entry calendar. Workers can make changes to their submitted time as long as the time period remains open.

Managers can submit time for workers with these reports:

- Auto Submit Time
- Edit and Approve Time
- Mass Submit Time
- Submit Time for Worker

Workday routes submitted time to an approver according to the workflow in the *Enter Time* business process.

Managers can use these reports to approve time:

- Edit and Approve Time
- Review Project Time
- Review Time

After managers approve the submitted time, the time information can be used by:

- Payroll processes to compensate workers.
- Third-party scheduling or payroll vendors when you export the information using the *Get Calculated Time Blocks* web service.
- Workday Absence Management to calculate accrued time off.
- Workday Projects for billing and costing.
- Workday Scheduling, which uses reported time blocks to calculate how effectively a schedule met the organization's productivity goals.

Related Information

Concepts

Concept: Enter Time Business Process on page 2669

Reference

Reference: Time Entry Options on page 2876

The Next Level: PATT Touchpoints and Reporting

Reference: Time Administrator Home Worklet

The Time Administrator Home worklet provides easy access to frequently used Time Tracking tasks, reports, and resources.

Card	Tasks, Reports, and Resources
Time Entry Core	• List Time Tracking Eligibility Rules • List Time Entry Templates • List Period Schedules • List Time Code Groups
Time Entry Detail	• List Time Calculation Tags • List Time Entry Codes
Schedules and Calendars	• List Holiday and Work Schedule Calendar Rules • List Work Schedule Calendars • List Holiday Calendars
Calculations and Validations	• List Time Calculation Groups • List Time Calculations • Maintain Time Calculation Priorities • Maintain Time Entry Validations • List Time Attestation Rules
Analytics	• Run Time Configuration Analyzer Tool

Card	Tasks, Reports, and Resources
	• View Time Configuration Analyzer Results
Resources	• Time Tracking section of the Administrator Guide • Community Workforce Management page • Time Tracking roadmap

Reference: Time Tracking Links on External Sites

You can use the Create Link to Initiate Business Process task to generate URLs that directly link to these Time Tracking tasks:

- Check In
- Check Out
- Enter My Time (Calendar and High Volume)
- Enter Time for Worker (Calendar and High Volume)
- Review Time
- Submit My Time
- Submit Time for Worker

See Create Direct Links to Initiate Business Processes.

FAQ: Time Tracking on Mobile

Are meal, break, and end of shift attestations available on the Time Tracking worklet on the mobile app?	When you configure attestations in the tenant and add them to workers' time entry templates, workers using Check In/Out on mobile can make time attestations.
Can I assign work schedules from the mobile app?	You can't initiate the action of assigning a work schedule from the mobile app. However, managers can take the same actions on the *Assign Work Schedule* business process on mobile that they

	can take from My Tasks on the desktop. Example: Managers can approve requests to assign work schedule calendars to workers.
Can I disable Enter My Time on mobile?	You can disable Enter My Time on mobile devices even for workers who have check-in and check-out capabilities enabled on desktop. If you're not using geofences, disabling Enter My Time can reduce check-outs from unapproved locations. To disable Enter My Time on mobile, on the Edit Tenant Setup - System task, select Disable Check In/Out on Mobile.
Can I disable Remind Me to Check Out for workers?	When you enable standard mobile check-in in the tenant-level settings, check-out reminders are automatically available and can't be turned off for workers. Workers can individually turn off their reminder messages.
Can I do all the same things I do on desktop on the mobile app?	You can access all tasks and reports using a mobile web browser. To see which tasks are available in the mobile app, see Reference: Time Tracking and Scheduling Tasks in Workday Mobile.
Can I make help text I've configured for the ***Enter Time*** business process visible on mobile?	No. Workday only displays the help text on desktop.
Can workers request time off on mobile?	Workers and managers can't make time off requests on the Time Tracking worklet on the mobile app. However, they can use the Absence Management worklet on the mobile app to request time off. When workers request time off, managers can use the Time Tracking worklet on the mobile app to take the same actions on the *Request Time Off* business process that they can from My Tasks on the desktop. Example: Managers can approve time off requests.
Can workers turn off check-out reminder notifications?	The Check Out Reminder feature is automatically available with standard mobile check-in. There's no tenant-level setting to disable these reminders. However, workers can disable notifications themselves. To turn off these notifications: 1. Access Settings on the Time Tracking worklet on the mobile app. 2. Select Push Notifications. 3. Toggle Check In/Out to off.
Do business processes work the same on desktop and mobile?	You can take the same actions on business processes on desktop and mobile even if the initiating action for the business process isn't available on mobile.
Do I need to make any configuration changes to use worktags with the mobile app?	No.
How can I ensure workers check in only from their scheduled shift location?	When you use Workday Scheduling, you can ensure workers only check in and out on mobile from locations where they're scheduled to work.

	See Steps: Set Up Geofences for Mobile Time Entry on page 2693.
How can I prevent workers from checking in or out on mobile devices?	Select Disable Check In/Out on Mobile on the Edit Tenant Setup - System task. This setting prevents workers in your tenant from using the check-in and check-out time entry option on the Workday mobile app. Workers can still check in or out when using web browsers on mobile devices. This setting doesn't disable the Enter My Time, Enter Time for Worker or My Schedule tasks.
How can I prevent workers from checking in or out on mobile devices when they're not at the work site?	Define 1 or more geofences in the Location Settings section of the time entry template. Workers can only check in and out on mobile when they are at the locations you define.
How can I restrict mobile time entry for specific subsets of workers?	Configure authentication policies to: • Block IP addresses. • Only allow access through specific networks. • Restrict access to Check In and Check Out tasks. See Concept: Authentication Policies
Is there a way to distinguish whether time blocks were entered on desktop or mobile?	No. You can use worktags to require a location when entering time. You can then use the location to determine whether a worker is at their workstation.
Once a worker has checked in, are break, meal, and check-out options all available?	Workers can choose from the out types configured on their time entry templates. Workers whose time entry templates allow meals and breaks have a Break button on their Home page card as well as a Check Out button. When they select Break, Workday prompts them to select *Break* or *Meal*, depending on the time entry template configuration.
What is the benefit of enabling standard mobile check-in?	Workers can add more details when checking in and out, including time type, comments, and worktags. Standard mobile check-in supports new mobile features, including meal and break attestations and geofences.

Related Information

Concepts

Concept: Scheduling Organizations on page 2159

Reference

Reference: Edit Tenant Setup - System

Time Tracking Hub

Concept: Time Tracking Hub

What Is Time Tracking Hub?

The Time Tracking Hub functional area includes a subset of existing Workday Time Tracking integrations, tasks, and reports. Time Tracking Hub is for customers who use a third-party time collection system and only need a limited set of Time Tracking features. If you use Time Tracking, you don't need to configure the Time Tracking Hub functional area. Time Tracking Hub:

- Enables you to import time blocks from a third-party time collection system into Workday. Once in Workday, you can use the reporting capabilities of Time Tracking to gain insight into time data.
- Doesn't include the ability to enter time or run time calculations.
- Integrates with other Workday products, including Workday Payroll and Workday Financial Management.
- Is a separate SKU and is unrelated to other hubs that are available in Workday.

Security

To set up Time Tracking Hub, configure these security domains, including their subordinate domains in the Time Tracking and Time Tracking Hub functional areas:

- *Process: Auto Submit Time*
- *Process: Import Time Blocks*
- *Process: Mass Submit Time*
- *Reports: Time Tracking*
- *Set Up: Time Tracking*
- *Worker Data: Time Tracking*
- *Worker Data: Time Tracking High Volume*

Any use of features outside of this description requires a subscription to the full Time Tracking product.

Time Entry Setup

Time Entry Setup Basics

Steps: Set Up Time Entry

Context

Configure the time entry experience for workers. Specify how workers can enter time, which time entry codes they can use, and what happens when they submit their time.

Steps

1. Select a Time Entry Method on page 2656.
2. Create Time Entry Codes on page 2657.
3. Create Time Code Groups on page 2661.
4. Create time entry templates.

   See: Steps: Create Time Entry Templates on page 2672.

5. Edit Business Process Security Policies.

   Configure the *Enter Time* business process.

   Define the workflow for Time Tracking and security requirements for entering and adjusting time.
6. Configure how Workday displays workers' position information during time entry.

   See: Reference: Edit Tenant Setup - HCM.
7. (Optional) Create Access Restrictions.

Related Information

Concepts

Concept: Enter Time Business Process on page 2669

Tasks

Steps: Set Up Time Tracking on page 2643

Examples

The Next Level: Time Tracking Configuration

The Next Level: PATT Touchpoints with Assignments

Select a Time Entry Method

Prerequisites

- Configure security for the *Enter My Time - High Volume (Delegation)* initiating action on the *Enter Time* business process policy.

  See Edit Business Process Security Policies.
- Security: *Security Configuration* domain in the System functional area.

Context

Specify whether workers use calendar-based time entry or high-volume time entry to enter time.

- When using calendar-based time entry, workers can enter and edit time directly on the time entry calendar. Consider using calendar-based time entry if you have workers who enter time for projects, enter exception time, or use time clocks and only need to make edits to entered time.
- When using high-volume time entry, the Enter Time for Worker and Enter My Time tasks are separate from the time entry calendar. You can view time entry calendars, but you can't enter or edit time directly on the calendar. Consider using high-volume time entry if you have large numbers of workers entering time at peak times of the day.

Workday recommends that you use calendar-based time entry for an improved time entry experience.

Domain security policies control access to the time entry methods, and Workday secures each time entry method to a separate set of domains. As a best practice, select only 1 time entry method for all of your workers and leave the domains for the other time entry method disabled. If different groups of workers need to use different time entry methods, configure the security groups so that no one has access to both methods.

Steps

1. Access the Domain Security Policies for Functional Area report.
2. From the Functional Area prompt, select *Time Tracking*.

3. Select a time entry method.
    - To use calendar-based time entry, enable and configure these domains:
        - *Self-Service: Time Tracking* and its subdomains.
        - *Worker Data: Time Tracking* and its subdomains.
    - To use high-volume time entry, enable and configure these domains:
        - *Self-Service: Time Tracking High Volume* and its subdomains.
        - *Worker Data: Time Tracking High Volume* and its subdomains.

Result

- Calendar-based time entry: The Enter Time for Worker and Enter My Time reports take you to the time entry calendar, where you can enter, edit, and submit time.
- High-volume time entry: The Enter Time for Worker and Enter My Time tasks display tables of time blocks. To submit time, access the Submit Time for Worker and Submit My Time tasks. You can also submit time on the time entry calendar by accessing the View Time for Worker or View My Calendar reports.

Note: If a worker sees duplicate time entry tasks, reports, and worklets, they've inadvertently been given security access to both time entry methods. Adjust your domain security policies so that workers have access to only 1 time entry method.

Related Information

Tasks

Edit Domain Security Policies

Create Time Entry Codes

Prerequisites

Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

Time entry codes describe the types of time workers can enter, such as *Worked Time*, *Training*, and *On Call*. They display in the Time Type prompt workers use when entering time.

Time code groups control who can use a set of time entry codes. Workers can use the time entry codes in:

- Their time code group.
- The default time entry code assigned to their time entry template.

Generally, create time entry codes only for the types of time you want workers to enter. Example: Create a code for overtime only if you want workers to specify which of their hours they want overtime pay. You might not need a time entry code for overtime if you define a time calculation that calculates overtime automatically.

Steps

1. Access the Create Time Entry Code task.
2. Enter a unique Name, such as *Worked Hours* or *Worked Time*.

    You can assign a different display name that workers see in the Display Name field.

3. Select the Units for entering time, typically *Days* or *Hours*.

   Access these values from the Common category:

   - *Hours*
   - *Days*
   - *Months*

   To define additional units such as Mile or Box, access the Maintain Units of Measure task.
4. Define General options for the time entry code.

   As you complete the task, consider:

Option	Description
Entry Method	If the Units are *Hours*, specify whether workers must enter hours only or in/out times. Example: 3 hours or 9:00 AM - 12:00 PM.
Display Name	(Optional) Enter a display name that workers see instead of the value in the Name field. You can give the same display name to more than 1 time entry code. Example: You might assign a display name of *Worked Time* to both the *Hours Only* and *In/Out* time entry codes.
Sort Priority	(Optional) Assign a sort priority to control the sequence of the time entry code in the Time Type prompt that workers see when entering time. Workday displays the time entry codes with smaller numbers higher in the list. Workday sorts codes alphabetically by default and when multiple time entry codes have the same sort priority.
Restrict Future Time Entry	(Optional) Restricts time entry for future dates when a worker: • Creates a new time block. • Edits an existing time block. This check box doesn't apply to: • Enter Time (Weekly) time entry method. • Time clock events. You can also restrict time entry for future dates on project hierarchies.

5. (Optional) If the Entry Method is *Hours Only*, select allowable increments for entering time.

   Workday requires that you enter hours as decimals. Example: Enter 1 hour and 30 minutes as *1.5* hours.

Increment For Hours Entry Examples	Workers Enter Time
0.01	As any value with 2 decimal places. Example: 0.15 or 1.33.
0.25	In multiples of 0.25 hours. Example: They can enter 2.5 hours, but not 2.1 hours.

6. (Optional) Enter a numeric value in the Default Quantity field. You can enter up to a maximum of 9999 units. Workday populates this value when workers enter time using Micro Edit through the time entry calendar.

   You can configure a default quantity for hours-based time entry codes where the time entry method is *Hours Only*. The Increment for Hours Entry you've configured on the time entry code must be in sync with the default quantity. Example:You enter *1 Hour* in the Increment for Hours Entry field. You can't enter a decimal value in the Default Quantity field such as *1.5*.

   You can also configure a default quantity for time entry codes where the unit is something other than hours. Example: You can enter a default quantity of 5 truck loads. Workday doesn't support default values for In/Out time entry codes.
7. (Optional) If the Entry Method is *In/Out Only*, select a rounding option.

   If a rounding option exists, Workday rounds each In and Out time to the nearest rounding marker. The breakpoint determines whether the time rounds up or down for calculation purposes. Workday then calculates the duration between the rounded In and Out times to 6 decimal places.

   For the *Custom Rounding* option, select rounding options for the In Time and Out Time separately.

   Note: If workers report time blocks that are shorter than the breakpoints, in and out times that Workday rounds separately can result in too much or too little time recorded for the workers.
8. Select the Default Calculation Tags to associate with calculated time that Workday generates when a worker enters time with this time entry code.

   The tags determine which:

   - Time calculations Workday applies to create calculated time.
   - Totals to update on the worker's time entry calendar.
9. On the Groups tab, define who can use the time entry code by adding it to one or more Time Code Groups.

   When using *Position*-based eligibility, workers can only select time entry codes that are valid for the position for which they're entering time. *Position*-based eligibility is available only for time code groups.
10. (Optional) On the Advanced tab, define advanced configurations for the time entry code.
    a) Select Worktag Entry Options for the time entry code.

       As you complete the task, consider:

Entry Option	Description
Default Value	The worktag value automatically populates during time entry. Workers can manually change the worktag value during time entry.
Hidden	Hides a worktag during time entry. Use this option if you've enabled a worktag on a time entry template, but you don't want to use it with this time entry code.
Required	When workers enter time with this time entry code, they must select a value for this worktag.

       For these options to apply, you must also enable the worktags on the worker's time entry template. The advanced worktag options on the time entry code refine the behavior of the worktags that you enable on the time entry template. If a worktag isn't enabled on a worker's time entry template, the worker can't enter a value for the worktag, even if you make it required for the time entry code.

b) In the Override Rate section, select override rate options for time entry.

As you complete the task, consider:

Field	Description
Allow Override Rate	Enable workers to override the default pay rate when entering time. The override rate that you manually enter onto a time block also overrides any override rate calculations that apply to the time block.
Currency	If you enable Allow Override Rate, specify the currency for the override rate. The currency displays on the time blocks on the time entry calendar. If you don't specify a currency, Workday doesn't display a currency on the time entry calendar. However, Workday does provide the default currency when sending time to Workday Payroll or Cloud Connect for Third Party Payroll.
Do Not Allow Self Service Edit	Prevent self-service users from entering an override rate on their own time blocks. Managers, administrators, or other authorized users entering time on behalf of a worker can still override the pay rate.

c) Select Allow Attachments to enable workers to attach documents, such as a jury summons or doctor's note, to time blocks that use this time entry code.

Result

Workers who are eligible for the new time entry code can select it when they enter time. Time entered using the new time entry code is included in the totals that display on the time entry calendar, if it has calculation tags that are included in the totals.

Next Steps

- If you've enabled attachments, configure segmented security to restrict access to Time Tracking documents.
- Review the time entry codes for accuracy using the All Time Entry Codes report.
- To stop using a time entry code, you can:
  - Inactivate it if an active time code group or time calculation isn't using the code.

    Use the Edit Time Entry Code task and select the Inactive check box.
  - Delete the code if it isn't the default time entry code for a time entry template. You can also delete the code if it isn’t associated with a reported time block. Use the Delete Time Entry Code task.

Related Information

Concepts

Concept: Time Calculations on page 2794

Tasks

Steps: Set Up Worktags for Time Entry on page 2708

Reference

Reference: Increments and Rounding for Time Entry on page 2671

Examples

Reference: Project Management Reports

Create Time Code Groups

Prerequisites

- Create Worker Eligibility Rules for Time Tracking on page 2826.
- Create time entry codes.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

Time code groups identify the time entry codes and time request codes for which workers are eligible. The only time entry code that a worker can use without a time code group is the default time entry code on their time entry template.

Steps

1. Access the Create Time Code Group task.
2. As you complete the Time Entry tab, consider:

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Worker Eligibility</td><td>Select 1 or more time tracking eligibility rules. Workers must meet the rule criteria to use the time entry codes in the group.

Workers must meet all the selected eligibility rule criteria when they enter time.

For workers with multiple jobs, you can create eligibility rules to evaluate either the worker's primary position or other jobs.

<table><tr><td>Job to Evaluate</td><td>Base Eligibility Rule on Business Object</td></tr><tr><td>Primary</td><td>Worker</td></tr><tr><td>Other</td><td>Position</td></tr></table></td></tr>
<tr><td>Country / Country Region</td><td>(Optional) Select countries or country regions that this time code group applies to. Selecting a value in this field improves performance for Time Tracking transactions that check time code groups.</td></tr>
<tr><td>Pay Rate Type</td><td>(Optional) Select the pay rate types that this time code group applies to. Selecting a value in this field improves performance for Time</td></tr>
</table>

Option	Description
	Tracking transactions that check time code groups.

Example: You configure a time code group and select *Salaried* and *Hourly* in the Pay Rate Type field and *Japan* in the Country / Country Region field. A worker's country must be Japan and their pay rate type must be salaried or hourly to be eligible for the time entry codes associated with this group.

3. On the Time Entry Codes tab, add:
   a) Time entry codes.
   b) (Optional) Time request codes, or both time entry codes and time request codes.

   Both a time entry code and a time request code can belong to multiple time code groups, and a worker can be eligible for multiple time code groups.

   Note: During editing or creating either one of those codes, you can add that code to time code groups.

Example

Example 1: Some of your workers in California belong to a company-wide union. These workers might be eligible for 2 time code groups:

- A *California workers* time code group with time entry codes, such as *California Meal Penalty*.
- A *Union workers* time code group with time entry codes, such as *Union Business.*

Example 2: Your organization has a global workforce who is subject to different requirements regarding overtime. These workers are eligible for different time code groups:

- A *California workers* time code group with time entry codes, such as *California Meal Penalty*, and no time request codes, as preapproval isn't required for overtime.
- A *German workers* time code group with time entry codes, such as *Union Business*, and an *Overtime* time request code, as preapproval of overtime is required.

Example 3: Workers in Germany are required to request overtime and on call time in advance. These workers might be eligible for 2 time request codes:

- A *German workers* time code group with an *Overtime* time request code and an *On Call* time request code, as both require preapproval, but are subject to different restrictions.

Next Steps

- Validate your changes by using the All Time Code Groups report to view time code groups. You can also use the View Worker's Time Eligibility report to view the time code group for a particular worker.
- To stop using a time code group, you can:
  - Inactivate the group if it has no active time entry codes and time request codes associated.

    Use the Edit Time Code Group task and select the Inactive check box.
  - Delete the group if it isn't associated with any eligibility rules.

    Use the Delete Time Code Group task.

Related Information
Concepts
Concept: Worker Eligibility for Time Tracking on page 2828

Steps: Set Up Tax Locations for Time Entry

Context

Set up time entry so that workers are taxed at rates that are based on the locations for which they enter time.

Example: Laura is a consultant based in Illinois, but she frequently works in California. During the last pay period, she worked 24 hours in Illinois and 64 hours in California. You need to enable her to specify that she worked 24 hours in Illinois and 64 hours in California so that Workday Payroll can tax her earnings for those hours at the appropriate rates.

Steps

1. Map tax authorities to locations.

   See Set Up Company Taxes by Location (USA).
2. Enable the *Location* worktag for time entry so that workers can specify a location when they enter time.

   See Steps: Set Up Worktags for Time Entry on page 2708.
3. (Optional) Configure default location worktags for projects so that workers don't have to manually specify a location whenever they enter time for a project.

   See Create Projects.
   a) Add *Location* as a Worktag Type.
   b) Select a location to use as the Default Worktag.

      The default location automatically populates when workers enter time for this project. They can override this location as necessary.

Result

When workers enter time, they can report a location for the time block. If you've configured a default *Location* worktag for a project, Workday automatically adds the default location to the time block when workers report time for that project. If necessary, the workers can override the default location and tag the time block with another location instead.

After you approve the time blocks, Workday Payroll withholds taxes on the workers' earnings based on the rates established by the tax authorities mapped to the locations specified on the time blocks.

Steps: Defer Time Clock Event Matching

Context

Note: Workday plans to retire the Defer Time Clock Event Processing option in a future release. Enabling this feature could impact performance in your tenant. Contact Workday Professional Services before using this feature.

When you have many workers simultaneously check in or out, postpone matching time clock events instead of automatically matching them. Run calculations for them in real time for more efficient time tracking.

Steps

1. Enable the Defer Time Clock Event Processing option.
    a) Access the Edit Tenant Setup - HCM task.
    b) Select Defer Time Clock Event Processing.
    c) (Optional) Select Use Automated Scheduling to have Workday automatically match pending time clock events.

    See Reference: Edit Tenant Setup - HCM.
2. (Optional) Schedule the Run Time Clock Event Processing task to match pending time clock events automatically on a regular basis.

    If you're using automated scheduling, Workday schedules the task for you, but you can also schedule additional processes.

    See Manually Schedule Time Clock Event Matching on page 2857.
3. (Optional) Schedule the Auto Submit Time task or the Mass Submit Time report to submit time at the end of a period automatically.

    If deferred time clock events exist when workers submit time, use the Auto Submit Time task or the Mass Submit Time report to prevent workers from manually matching their pending time clock events. Always check for and match pending time clock events before mass submitting time. Otherwise, you must resubmit the time after Workday matches the pending time clock events.

    See Mass Submit Time on page 2854 and Auto Submit Time on page 2852.
4. (Optional) Create and schedule a custom report using the Is Pending report field to check for any pending time clock events.

    As a best practice:

    - Schedule this report to run before the Mass Submit Time report so that you can resolve any pending time clock events before submitting time.
    - To stop deferring the time clock event matching, run this report to ensure that there are no pending time clock events.
5. (Optional) If you use the time entry calendar to review and submit time instead of mass submitting time, add a time entry validation that prevents workers from submitting time if there are pending or unmatched time clock events.

    If a worker submits time with pending time clock events, they must resubmit that period after the pending time clock events match.

    See Create Time Entry Validations on page 2812.

Related Information

Concepts

Concept: Time Clock Events on page 2863

Tasks

Set Up Time Clock Event Matching Options on page 2678

Create Predictive Scheduling Configurations

Prerequisites

Security: *Set Up: Time Calculations* in the Time Tracking Calculations functional area.

Context

You can use predictive scheduling configurations to define rules to control whether workers are paid a premium when they work without a sufficient break between shifts. After setting up configurations, create minimum rest time calculations. Workday uses configurations and calculations to apply time calculation tags to time blocks. You can then map the calculation tags to Payroll earnings to identify how to pay time.

Steps

1. Access the Create Predictive Scheduling Configuration task.
2. As you complete the General Options tab, consider:

Option	Description
Allowed Out Types	Select one or more out types that will trigger the calculation. Only select Meal or Break if you use these out types to indicate the end of a shift.
Minimum Rest Hours after Last Out (up to 48)	Define a threshold of hours that workers should be away from work between shifts. If a worker enters time before the threshold ends, Workday tags those hours with the calculation tag for minimum rest. You define the minimum rest calculation tag on the calculation.

Example

You enter *8* in the Minimum Rest Hours after Last Out (up to 48) field and *Out* in the Allowed Out Types field.

Jennifer works these hours:

In/Out	Time
In	6:00 AM
Out	12:00 PM
In	4:00 PM
Out	9:00 PM

Workday tags to Jennifer's time blocks that fall within the 8-hour minimum rest threshold you defined:

Time Block	Calculation Tags
6:00 AM-12:00 PM	Regular
4:00 PM-8:00 PM	Minimum Rest
8:00 PM-9:00 PM	Regular

Workday doesn't tag the 8:00 PM-9:00 PM time block because it is outside the 8-hour threshold.

Next Steps

- Create minimum rest time calculations that tag time blocks that meet the criteria you've defined on the configuration.

Related Information

Tasks

Create Minimum Rest Calculations on page 2740

Examples

Example: Calculate Minimum Rest Time on page 2783

Set Up Statutory Holiday Eligibility (CAN)

Prerequisites

- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

A statutory holiday configuration is a set of requirements that determines whether workers receive pay for a statutory holiday. You can create configurations for each province or territory in Canada based on:

- Regulatory requirements.
- Federal guidelines

Workday automatically populates certain values in the configurations, but you can modify the values to give workers a greater benefit.

After setting up configurations, you can create a holiday time block create calculation that Workday uses along with the configurations to create time blocks for the statutory holiday. Time Tracking then passes the time blocks to Workday Payroll to calculate the rate of pay.

Steps

1. Access the Create Statutory Holiday Configuration task.

   Create a configuration for each province or for federal regulations.
2. From the Jurisdiction prompt, select the calculation method for holiday-based pay:
   - Select Provincial to calculate holiday pay based on the provincial or territorial statutory holiday pay configured.
   - Select Federal to use federal guidelines to calculate statutory holiday pay for federal workers.
3. As you complete the Look Back Calculation (Time & Payroll) section, consider:

Option	Description
Look Back Period (Days)	The period of time preceding the statutory holiday over which Workday evaluates worked time to determine the rate of pay for a statutory holiday. Workday automatically populates the look back period based on requirements for the province you selected. This value isn't configurable.
Look Back Reference Point	Based on the provincial requirement, Workday automatically populates the reference point with either the week that precedes the holiday or the day of the holiday itself.
Worked Hours Calculation Tags	Select the hours to include in the earnings eligible for statutory holiday pay. To include paid time off in the look-back period, add the calculation tag for the worker's time off plan.
Include System Generated Time Blocks	Enables Workday to include system-generated time blocks in the related Holiday Time Block Create calculation quantity. The calculation quantity is the total hours worked over the look back period divided by the number of days in the look back period.

Option	Description
	Any system generated blocks included in the statutory holiday time calculation will be treated as hours.
Statutory Holiday Calculation Tag	Create a statutory holiday calculation tag. Example: Canada Statutory Holiday. You'll use this tag in holiday time block create calculations and on the earning in Workday Payroll.

4. As you complete the eligibility sections, consider:

Option	Description
Days Employed	The number of days that a worker must be employed before the holiday to be eligible for a statutory holiday.
Worked Days	The number of days an employee must have reported work hours to be eligible for a statutory holiday. Workday checks for time blocks or time offs that are tagged with *Worked Hours* calculation tags to determine whether a day was worked. Must be less than the Period Days/Months value.
Period Days/Months	The window during which the employee must meet the Worked Days requirement. Example: An employee must work at least 30 days or more in the 12 months before the holiday. If Period Unit is: • *Days*: Must be less than or equal to 30. • *Months*: Must be less than or equal to 12.
Must Work Scheduled Day Before and After Holiday	To be eligible for the statutory holiday, specify if an employee must work the: • Day before. • The day of. • The day after.
Use Workday Scheduling Data	Enables Workday to determine scheduled days based on schedules from the Workday Scheduling SKU instead of work schedule calendars from Time Tracking. You must have the Workday Scheduling product for this to take effect.

Next Steps

- Create time calculations that create statutory holiday time blocks for workers based on the configuration for their province or federal statutory holiday pay.
- Using Workday Payroll, setup earnings for holiday pay.

Related Information

Tasks

Create Time Calculations for Statutory Holidays (CAN) on page 2757

Examples

Concept: Statutory Holiday Look-Back Periods (CAN)

Example: Configure Statutory Holiday Pay for Provinces (CAN)

Example: Create Time Code Groups for Multiposition Workers

This example illustrates how to create time code groups for workers with more than 1 job.

Context

You need to enable a salaried worker in your company to enter additional time worked for a secondary role in a different internal organization.

Prerequisites

- Create a worker with a salaried and an hourly position.
- Security: *Set Up: Time Tracking* domain in the Time Tracking or Time Tracking Hub functional area.

Steps

1. Access the Create Time Tracking Eligibility Rule task.
2. In the Description field, enter *Position hourly pay*.
3. Select these values in the Rule Conditions grid:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Pay Rate Type* Select the *Pay Rate Type* option with the Position - Position Management business object. View the related actions menu to verify the business object associated with a Pay Rate Type option.	*in the selection list*	*Value specified in this filter*	*Hourly*

4. Click OK.
5. Access the Create Time Entry Code task.
6. Enter these values:

Options	Values
Name	*Regular - Position Based*
Units	*Hours*
Entry Method	*Hours Only*

Options	Values
Default Calculation Tags	*Regular*

7. Click OK and Done.
8. Access the Create Time Code Group task.
9. In the Name field, enter *Position hourly pay*.
10. On the Time Entry tab, select Position hourly pay from the Worker Eligibility prompt.
11. On the Time Entry Codes tab, select *Regular - Position Based* from the Time Entry Codes prompt.
12. Click OK and Done.

Related Information

Tasks

Create Hourly Plans on page 1077
Create Salary Plans on page 1069
Create Positions on page 595
Add Additional Jobs on page 879

Concept: Enter Time Business Process

Time Entry Business Process

The *Enter Time* business process consists of 3 steps:

- Enter time. Separate initiating actions exist for the various time entry options. Example: Quick Add.
- Submit time.
- Approve time.

Initiation actions also exist for:

- Adjusting calculated time.
- Clearing all time blocks for a week.
- Running calculations.

You can configure the *Enter Time* business process to route time entries to the appropriate roles for review and approval. Example: You can route submitted time blocks for approval to a worker's:

- Manager.
- Timekeeper.
- Project manager (for time entered by project).
- Cost center manager (for time entries with a *Cost Center* worktag).
- Location manager (for time entries with a *Location* worktag).

You can also route time entries to multiple reviewers. For a worker with multiple positions, you can require approval from all managers or just 1 manager from each position.

The *Enter Time* business process doesn't include cancellations, rescinds, or corrections. Administrators, managers, or workers can enter, modify, or delete time blocks until the period is locked. When they delete or modify approved time blocks or time blocks that impact calculations, they must resubmit those time blocks.

Business Process Security

Security policies for the *Enter Time* business process control who can use various time entry features. You can configure the business process to restrict time entry, submission, and approval by role. Example: You can configure the *Enter Time* business process so that managers and Time Tracking administrators can enter time with Quick Add but employees can't.

Effort Certification

The *Enter Time* business process enables you to display a Certify Effort page to workers so that they can certify their reported time. Time entry templates include an option for selecting the text that displays at the top of the Certify Effort page.

Delegation

The *Enter Time* business process supports self-service delegation and also enables you to delegate initiating actions. Example: Managers typically enter time for themselves and their workers but can delegate these tasks to administrators.

Related Information

Examples

Concept: Business Processes

Edit Business Process Security Policies

The Next Level: Overview of Time Tracking

Concept: Time Tracking 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.

Using Workday Assistant for Time Tracking Tasks

Workers can use Workday Assistant to quickly access time entry tasks, reducing the number of clicks required to navigate to frequently used tasks. Example: When workers enter a phrase such as "enter my time" in Workday search, Assistant provides a link to the time entry calendar where the worker can enter time blocks.

Workday Assistant doesn't support:

- Entering time on mobile devices.
- Entering time for days in the past or future.
- High-volume time entry.
- Time approval.

To configure Workday Assistant for Time Tracking, you must be a member of a security group on these domains:

- *Manage Bot and User Conversations* in the System functional area.
- *Set Up: Edit Tenant Setup - Assistant* in the System functional area.
- *Set Up: Time Tracking* in the Time Tracking functional area.

You can enable workers to enter time using Workday Assistant by adding relevant workers to these security domains and business process security policies:

Functional Area or Business Process	Security Domain or Action	Notes
System Functional Area	• *Assistant* • *Bots*	Add workers to these domains so they can access Workday Assistant.
Time Tracking Functional Area	For check in and check out workers: • *Self Service: Time Clock* • *Process: Time Block REST APIs*	Add workers to these domains so they can enter time. Workday Assistant navigates workers to the time entry calendar when they need to enter time blocks.

Functional Area or Business Process	Security Domain or Action	Notes
	• *Process: Time Clock Event REST APIs* For workers who enter time on the calendar: • *Self Service: Time Calendar* • *Process: Time Block REST APIs* • *Process: Time Clock Event REST APIs*	
Enter Time Business Process	Ensure workers can access these initiating actions: • *Time Block Micro Edit* • *Submit Time* • *Submit Time (REST Service)*	Configure the business process security policy so workers can enter and submit time using Workday Assistant.

Related Information

Tasks

Steps: Set Up Time Entry on page 2655

Reference

Reference: Edit Tenant Setup - Assistant

Examples

The Next Level: Innovation Services for Time Tracking

Reference: Increments and Rounding for Time Entry

Select an increment or rounding option for time entry codes and time request codes that use units of hours.

Increments for hours-only time entry

Increment	Equivalent	Time Entry Example
0.01 Hours	36 seconds	*1.12* = 1 hour, 7 minutes, and 12 seconds
0.05 Hours	3 minutes	*1.15* = 1 hour and 9 minutes
0.1 Hours	6 minutes	*1.3* = 1 hour and 18 minutes
0.25 Hours	15 minutes	*1.75* = 1 hour and 45 minutes
0.5 Hours	30 minutes	*1.5* = 1 hour and 30 minutes
1 Hour	60 minutes	*2* = 2 hours

Rounding options for in/out time entry

Times before or at the breakpoint round down to the previous marker and times after the breakpoint round up to the next marker.

Rounding Option	Rounding Example	Calculation Example
No Rounding		8:02 AM to 9:10 AM is calculated as 1.133333 hours.

Rounding Option	Rounding Example	Calculation Example
3 Minute Marker (1-minute breakpoint)	8:01 AM rounds to 8:00 AM 8:02 AM rounds to 8:03 AM	8:01 AM to 9:02 AM is calculated as 1.05 hours.
5 Minute Marker (2-minute breakpoint)	8:02 AM rounds to 8:00 AM 8:03 AM rounds to 8:05 AM	8:02 AM to 9:03 AM is calculated as 1.083333 hours.
6 Minute Marker (2-minute breakpoint)	8:02 AM rounds to 8:00 AM 8:03 AM rounds to 8:06 AM	8:02 AM to 9:03 AM is calculated as 1.1 hours.
15 Minute Marker (7-minute breakpoint)	8:07 AM rounds to 8:00 AM 8:08 AM rounds to 8:15 AM	8:07 AM to 9:08 AM is calculated as 1.25 hours.
30 Minute Marker (15-minute breakpoint)	8:15 AM rounds to 8:00 AM 8:16 AM rounds to 8:30 AM	8:15 AM to 9:16 AM is calculated as 1.5 hours.

Related Information

Tasks

Create Time Entry Codes on page 2657

Create Time Request Codes on page 2719

FAQ: How do I exempt workers from lockout dates?

When configuring a period schedule for time tracking, you can specify lockout dates when workers can't enter or adjust time. You can exempt workers from the lockout by assigning their user-based or role-based security group to the *Time Tracking: Exempt from Lockout* domain. Exempt workers can continue to enter and adjust time during the lockout period.

When you select the Allow Project Transfer in Closed Periods check box on the Set Up Project Billing Configuration task, workers who have access to the *Time Tracking: Exempt from Lockout* domain can transfer project time blocks in closed time entry periods.

Related Information

Tasks

Set Up Project Billing Configurations

Examples

Set Up Payroll and Time Tracking Period Schedules

Time Entry Templates

Steps: Create Time Entry Templates

Prerequisites

- Create time entry codes.
- Create time code groups.
- Create time tracking eligibility rules for assigning templates to workers.

Context

You can use time entry templates with effective dates to customize time entry calendars for workers.

Workday recommends that you create separate templates for each group of workers with similar compensation and time entry requirements. Typically, you create templates by organization. Example: You create separate templates for food service workers, IT personnel, and instructors.

Steps

1. Set Up Time Entry Templates on page 2673.
2. (Optional) Define related worktags for projects to enable workers to enter project task time.
   See: Steps: Set Up Worktags for Time Entry on page 2708.
3. (Optional) Set Up Time Clock Event Matching Options on page 2678.
4. (Optional) Set Up Time Entry Calendars on page 2679.
5. (Optional) Set Up Time Submission on page 2681
6. (Optional) Add an effort certification step to the *Enter Time* business process.
   See Steps: Set Up Effort Certification for Time Tracking on page 2682
7. (Optional) Set Up Calendar Totals on page 2683.
8. (Optional) Set Up Time Shift Options.
9. (Optional) See: Steps: Set Up Project Time Entry on page 2689.
10. (Optional) See: Steps: Set Up Meal and Break Validations on page 2808.
11. (Optional) See: Steps: Set Up End of Shift Time Attestations on page 2806.
12. (Optional) See: Steps: Set Up Geofences for Mobile Time Entry on page 2693.

Next Steps

Run these reports to verify time entry template details:

- All Time Entry Templates.
- All Time Entry Template Effective Dates.
- Audit - Workers with Multiple Time Entry Templates. Identify any workers who meet the eligibility rules for more than 1 time entry template.
- View Worker's Time Eligibility. Ensure that workers are eligible for only 1 time entry template.

You can copy time entry templates to create new time entry templates with similar configurations. From the related actions menu of a time entry template, select Time Entry Template > Copy.

You can copy effective-dated configurations to create similar configurations with different dates. Access the View Time Entry Template report, and click Copy Effective-Dated Data.

Note: Consider the impact on workers who have entered but not submitted time before you:

- Delete a template.
- Delete a template effective date.
- Inactivate a template.

Related Information
Tasks
Create Worker Eligibility Rules for Time Tracking on page 2826
Examples
2021R2 What's New Post: Time Off in Time Calculations

Set Up Time Entry Templates

Prerequisites

Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

You can configure the foundational aspects of a worker's time entry calendar, including:

- The default time entry code to associate with reported time.

- Whether workers are required to enter comments on time entries.
- Meal and break options.

Steps

1. Access the Create Time Entry Template task.
2. Select an effective date.

   You can add additional past- or future-dated dates.
3. Assign a Default Time Entry Code.

   The code you select:

   - Populates the Time Type prompt on the time entry calendar.
   - Applies to time entered for projects and tasks.
   - Ensures that all time has a time entry code.
   - Determines the section of the time entry calendar from which workers can select projects and tasks: Hours/Units or In/Out Times.

   Workers are eligible for the default code even when it doesn't belong to a time code group. However, we recommend that you always include the default time code in a time code group that the worker is eligible for.
4. (Optional) Select the Enable Workday Scheduling check box to enable Workday to use data from Workday Scheduling in Time Tracking.

   To enable Workday Scheduling or Workday Scheduling and Labor Optimization, contact your Customer Base Account Executive. Workday Scheduling and Labor Optimization are separate products (SKUs) that require separate licenses.
5. On the Effective-Dated tab, expand the Time Entry section.
6. Complete the In/Out Entry Options section, consider:

Option	Description
Allowable Types for Out Time	Select the type that your workers can use when reporting an Out time. Your selection here affects: • The default in/out patterns you can select. • Whether you can create time blocks for breaks. • Your options in the Time Shift section.
Default In/Out Pattern	The default in/out pattern displays in the In/Out Times section on the Enter Time grid. The pattern doesn't apply to alternate time entry methods (such as Quick Add or Auto-fill). Workers can add or subtract rows, and change the out type according to the time entry template and time entry code.
Track In and Out times down to the second	Track seconds for all reported times, calculated times, and durations associated with this time entry template.
Enable Optional Out Times	Makes the Out field optional when workers enter time using these time entry methods: • Enter Time by Week. • High-Volume Time Entry. • Time Entry Calendar.

Option	Description
	• Quick Add. Note: Incomplete time blocks don't match with time clock events.
Prevent Submission of Incomplete Time Blocks	Prevents workers from submitting time when their submission includes incomplete time blocks. This option is available only when you select Enable Optional Out Times.

7. (Optional) In the Worker Edits for Check In and Check Out Tasks section, enable workers using the check-in and check-out time entry methods to edit their check-in and check-out times on mobile devices.

   Set threshold values from 0-120 minutes.

   Note: You can't enable this feature when you enable:

   - Shift-based check-in
   - Geofences by scheduled shift location

   We recommend you don't enable this feature and time attestations on the same time entry template.
8. (Optional) Complete the Shift-Based Check-In section, consider:

Option	Description
Enable Shift-Based Check-In	Enables Workday Time Tracking to use data from shifts in Workday Scheduling during time entry. This option doesn't apply to work schedule calendars from Time Tracking.
Threshold Before Check-In (Minutes) Threshold After Check-In (Minutes)	Define the range during which Workday identifies and matches the shift with shift details. Example: You enter *15* in Threshold Before Check-In and *15* in Threshold After Check-In. A worker checks in at 7:50. Based on the 15-minute threshold, Workday checks for shifts starting between 7:35 and 8:05. Workday finds a shift that starts at 7:45 for the worker's Cashier position at the San Francisco location. Workday automatically populates *Cashier* in the Position field and *San Francisco* in the Location field when the worker checks in to work. When you don't define a position on the shift or the shift falls outside the threshold, Workday populates the worker's primary position.
Default Location	Select to enable Workday to automatically populate the location on time blocks during time entry to the location on the closest scheduled shift in Workday Scheduling.
Default Position	Select to enable Workday to automatically populate the position on time blocks during time entry. Workday populates the position

Option	Description
	on the closest scheduled shift in Workday Scheduling.

Note: You can't enable this feature when you enable worker edits on Check In or Check Out tasks.

9. (Optional) Complete the System Meals and Breaks section, consider:

Option	Description
Create Time Blocks for Breaks	Automatically creates time blocks for the time that workers are on break. This option applies only when *Break* is a valid out type for the time entry. You might find this option useful if you pay your workers for their break time. The time block created for a break inherits the time entry code of the preceding time block.
Copy Worktags for Breaks	Enables break blocks to automatically inherit worktags from the reported time block immediately before a break block. Break blocks always inherit time entry codes and calculation tags from the reported time blocks before them, regardless of this setting.
Create Time Blocks for Meals	When workers select the *Meal* out type, Workday automatically creates meal blocks for time that workers take for their meal. This option only applies when you select *Out, Meal and Break* or *Out and Meal* in the Allowable Types for Out Time prompt. The time block created for a meal inherits the time entry code and time calculation tags of the preceding time block. To prevent this inheritance, use a time block conditional calculation to update the tags.
Copy Worktags for Meals	Enables meal blocks to automatically inherit worktags from the reported time block immediately before the meal block.

10. (Optional) Complete the Time Entry Restrictions section, consider:

Option	Description
Require Comments on Time Entry Changes	Requires comment on the time block when a worker: • Creates new time blocks on a day in the past. • Edits existing time blocks. • Deletes existing time blocks. Workday doesn't require workers to enter a comment when they enter or modify time in the future. This option applies only when workers use these time entry methods:

Option	Description
	• Auto-fill from Prior Week. • Auto-fill from Schedule. • Enter Time by Type. • Enter Time by Week. • High-Volume Time Entry. • Quick Add. This option doesn't apply when workers use: • Enter Time (Weekly) time entry method. • Time clock events. Workday recommends that you don't select this check box when using these entry methods as workers can delete existing time blocks without requiring comments: • Auto-fill from Prior Week. • Auto-fill from Schedule. When you select this check box, Workday doesn't display the Clear option on the time entry calendar. This option prevents workers from deleting time blocks without entering a comment. You can view a worker's most recent comment on the History tab of the time block details.
Require Comments for Changes Older Than (Up To 3 Days)	The number of days before which you require workers to add comments for time entry changes. Workday populates this field to *0* when you select the Require Comments on Time Entry Changes check box. Example: Set the Require Comments for Changes Older Than (Up To 3 Days) field to *2*. On August 16, a worker must provide a comment when editing a time block from before or on August 14.
Restrict Check-In Before Scheduled Start Time	Activate to prevent workers from checking in earlier than a set threshold before their next shift start time.
Threshold Before Restricting Check-In (Minutes)	The number of minutes before the start of the next shift that workers can check in. Example: You set the threshold to 5 minutes. A worker is scheduled for 2 shifts: • 03:00 to 06:00 • 10:00 to 12:00 The worker can check in any time between 02:55 and 06:00 for the first shift and between 09:55 and 12:00 for the second shift.

11. (Optional) Expand the Eligibility section. Specify which workers are eligible for the time entry template by selecting 1 or more Time Tracking eligibility rules. When you select more than 1

eligibility rule, workers must meet the criteria for all of the rules you select. For workers with multiple jobs, template eligibility is based on the worker's primary job, but you can create conditions that evaluate all of a worker's positions.

Eligibility rules based on the Position business object aren't available for time entry templates.

Set Up Time Clock Event Matching Options

Prerequisites

- Create a time entry template.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

Specify how Workday should match time clock events into time blocks.

Steps

1. Access 1 of these tasks:
    - Create Time Entry Template
    - Edit Time Entry Template
2. On the Effective-Dated tab, expand the Time Entry section.
3. Select time clock event matching options:

Option	Description
Maximum Time Block Duration (Hours)	Enter the maximum number of hours that time clock events can be separated by for Workday to match them into a time block. If you don't specify a maximum, or if you specify a maximum of zero hours, Workday automatically populates a maximum of 24 hours. You can't specify a maximum greater than 24 hours.
Prevent Matching of Consecutive Check-Ins	Leave this option unchecked if you want to enable workers to change how they're tracking time without first checking out. They can select different: • Time entry codes • Positions • Project tasks • Worktags When you leave this option unchecked, Workday creates time blocks from pairs of consecutive check-in events. Each time block consists of: • A check-in event. • The details entered for the check-in event. • A check-out event that Workday creates from the second check-in of the pair. Check-ins are unmatched events until workers either check out or check in again.

Option	Description
Warn Worker on Consecutive Check-In	Displays a warning to employees to prevent workers from accidentally checking in multiple times. Also requires the worker to select a check box to confirm that they want to check in again.
Warning Message	You can use the Workday-delivered warning message or enter a custom message.

Related Information

Concepts

Concept: Time Clock Events on page 2863

Tasks

Steps: Defer Time Clock Event Matching on page 2663

Manage Time Clock Events on page 2856

Manually Schedule Time Clock Event Matching on page 2857

Examples

2021R2 What's New Post: Warnings for Consecutive Check-Ins

Set Up Time Entry Calendars

Prerequisites

- Create a time entry template.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

Specify the methods workers can use to enter time on their time entry calendar. Configure how a time entry calendar behaves and displays.

Steps

1. Access 1 of these tasks:
    - Create Time Entry Template
    - Edit Time Entry Template
2. On the Noneffective-Dated tab, expand the Calendar section.
3. Complete the View Options section:

Option	Description
Primary Calendar	Select whether Workday displays a calendar view that matches the worker's Time Tracking period schedule.
Default Calendar View	Select whether the default view for workers is the Weekly view or Monthly view.
Additional Enabled Calendar Views	Select so that workers can change their calendar view from the default to an additional enabled view.

4. Complete the Entry Methods section.
    a) Select the time entry options that workers can use to enter time. Also enable these options on the *Enter Time* business process security policy before workers can use them. While workers

can access some time entry methods from the Monthly calendar view, they still enter time 1 week at a time.

Time Entry Method	Description	View Availability
Auto-fill from Prior Week	Enable workers to copy hours from a prior week to the current week. This option doesn't include time off entries.	Monthly Period Weekly
Auto-fill from Schedule	Enable workers to copy hours from their work schedule to the current week.	Monthly Period Weekly
Quick Add	Enable workers to add several time blocks quickly with the same details, for the same week.	Monthly Period Weekly
Enter Time by Week	Enable workers to use a weekly grid option from the calendar to enter time for an entire week at once.	Weekly
Enter Time by Type	Enable workers to enter time for multiple time types at once for the current week. This option is only available for quantity-based time entry codes.	Monthly Period Weekly

b) Select a Default Time Entry Method.

Select a default time entry method that links to these time entry worklets:

- Last Week
- Select Week
- This Week

Currently, you can select only the *Enter Time by Type* time entry method. You can view this option only if you select the Enter Time by Type check box.

5. Complete the Additional Options section:

Option	Description
Auto Expand Payroll Costing Allocations	Automatically expand the Payroll Costing as of End of Week worklet on a worker's time entry calendar. This worklet displays the worker's default costing allocations.
Hide Pay Date Indicators Hide Time Period Locked Indicators Hide Time Period End Indicators	Hide the pay date, time period locked, or time period end indicators on the time entry calendar. If you don't hide the indicators, the time entry calendar displays them on the days the respective events take place.
Display Absence Balances	Display a View Absence Balances button on the time entry calendar. When workers select the button, Workday displays a modal that

Option	Description
	lists the worker's time off balances that you've configured to display to self-service workers. For workers to access this button, they must have View and Modify access on the *Worker Data: Time Calendar* domain security policy.
Include Scheduling Data	Display scheduling data on the period calendar.

Next Steps

Enable the selected time entry options on the *Enter Time* business process security policy.

Related Information

Concepts

Concept: Enter Time by Period on page 2871

Reference

Reference: Time Entry Options on page 2876

Examples

Set Up Worklets

2024R2 Feature Release Note: Enter Time by Period

2021R2 What's New Post: Time Tracking Monthly Calendar

Set Up Time Submission

Prerequisites

- Create a time entry template.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

Configure options that affect what happens when workers submit their time entries.

Steps

1. Access 1 of these tasks:
    - Create Time Entry Template
    - Edit Time Entry Template
2. On the Noneffective-Dated tab, expand the Business Process section.
3. Configure these fields:

Option	Description
Submit by Time Period	Enable workers to submit time entries for approval by time period rather than by week. Workday continues to run calculations by week.
Independent Events for Multiple Jobs	Create separate approval events for each position when a worker submits time for multiple positions. The approval events are independent of each other: If someone delays

Option	Description
	an approval, it doesn't hold up approval for another position. If selected, only managers associated with the position can approve workers' time entries in the Edit and Approve Time Report.
Route Time Approval by Worktags	Workday creates independent events for the worktags you select. You can use the worktags in the routing rules on the Enter Time business process definition to route time entries to approvers by worktag.
Submit Text	Select a message to display when workers submit their time using the time entry calendar. Use the Create Time Tracking Submit Text task to add messages. If left blank, the Workday-delivered default submit text displays when workers submit their time.
High Volume Confirmation Text	Select a message to display on the confirmation page when workers enter their time using high-volume time entry. Use the Create Time Tracking Submit Text task to add messages.
Effort Certifying Text	If workers are required to certify their reported time, select the text to display along with the certification check box. Use the Create Effort Certifying Text Task to add text. The Certify Effort page only displays when the *Enter Time* business process includes a *Certify Effort* action step.
Hide All Current Time	If selected, Workday hides the All Current Time section during the approval of a worker's time in My Tasks. Instead, only time blocks or time off entries included on the event are visible to the approver. If left blank, the All Current Time section remains visible by default during approval.
Allow Mass Auto-fill From Schedule	Enable the *Mass Autofill from Schedule* process to automatically populate workers' time entry calendars with time blocks based on their work schedules.

Steps: Set Up Effort Certification for Time Tracking

Context

Configure the *Enter Time* business process to have your workers certify their worked time for the week. Example: You could add an effort certifying step:

- After the initiating action to have workers certify their time upon submitting it, and
- After the final approval to have workers also certify time entered by others on their behalf.

In the effort certification step, a Certify Effort page displays and by clicking Approve, the worker certifies everything that displays on the page.

The Certify Effort page displays total hours worked during the week by time entry code, position, and worktags. Totals represent reported time blocks for time entry codes that use hours. The worker's cost allocation instructions (as of the last day of the time entry week) display across the top of the page and reflect any costing instructions defined for the worker and worker's position in Workday Payroll. Hours with no worktag overrides are allocated accordingly.

Steps

1. Select Business Process > Edit Definition from the related actions menu of the *Enter Time (Default Definition)* business process and add an effort certification step.

Option	Description
Order	Specify when the effort certification step should happen.
Type	Select *Action*.
Specify	Select *Certify Effort*.
Group	Specify who should complete the effort certification step.

2. (Optional) Access the Create Effort Certifying Text task.

   Create a custom effort certifying statement. If you do not create a custom statement, Workday displays default text when workers certify effort.

   a) Name your effort certifying text so you can identify it later.
   b) Write a statement for workers to use when certifying their hours for the week.

   Security: *Set Up: Effort Certification* domain in the Core Payroll functional area.
3. (Optional) Access the Create Time Entry Template task.

   a) On the Noneffective-Dated tab, expand the Business Process section.
   b) Select an effort certifying text to display.

   Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Result

You can use the View Effort Certifying Texts report to view all of the effort certifying statements you currently have.

Related Information
Examples
Steps: Set Up Effort Certification

Set Up Calendar Totals

Prerequisites

- Create a time entry template.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

Configure the totals that display on a worker's time entry calendar and time review events. Workday updates totals as a worker enters time and can include time off mapped to calculation tags.

When you enable time shift on the time entry template, Workday adds a shift date to each time block and calculated time off. Workday bases calculations of daily and weekly totals on the shift date. When a shift crosses a week breaker, Workday uses the shift date to determine in which week the time block or calculated time off belongs. Workday then adds the time to the total for that week.

Totals:

- Display the primary total on each day of the time entry calendar.
- Display in the primary unit of time.
- Also display the nonprimary total when you review, submit, or approve time.
- Display either reported or calculated time, depending on your configuration.

Additional Totals:

- Display based on worker eligibility for the effective-dated time entry template that is active at the end of the worker week based on the worker's work schedule calendar.
- Display in the Summary section.
- Always represent calculated time.
- Are visible to approvers through mobile Time Tracking approvals.

Steps

1. Access 1 of these tasks:
    - Create Time Entry Template
    - Edit Time Entry Template
2. (Optional) On the Effective-Dated tab, expand and complete the Totals section:

Option	Description
Total	The numbers 1 or 2 control the display order from left to right on time review events.
Unit	The unit for the reported daily total time that Workday displays on time review events when: • Managers and workers submit time. • Managers approve, send back, deny, or correct time. • Managers review time events in My Tasks.
Label	(Optional) Overrides the units of time. Example: *Stores Visited* overrides the *Each* unit.
Primary	The primary daily total. Workday displays the worker's primary reported daily total time on: • Each day on the time entry calendar. • High-volume time entry. • The Time worklet. Workday displays the secondary daily total in time review events only if the value of the reported daily total is nonzero.
Include Calculation Tags	(Optional) Time calculation tags that override your Totals grid configuration. Workday includes the hours associated with time calculation tags in the daily Hours totals on the time entry calendar.

Option	Description
	If you leave this field blank, Workday will base the daily Hours totals on reported dates and midnight day breakers.
Sum Based on Calculated Quantity	(Optional) Causes totals in these areas to respect calculated, rather than reported dates, and nonmidnight day breakers: • Time worklets. • Time submission tasks. • The time review event header and the Daily Totals section in the time approval in My Tasks. Workday automatically selects this check box when you add calculation tags to the Include Calculation Tags field. However, you can select it even if you don't select a particular calculation tag.

3. Complete the Additional Totals section:

Option	Description
Total	The numbers 1 through 12 control the display order.
Include Calculation Tags	Select 1 or more time calculation tags (that use the same unit of measure) to total.
Label	Name the totals that workers see on the time entry calendar and elsewhere throughout time entry.

Result

The configured totals display when you view a worker's time entry calendar.

When you or workers click Review on the time entry calendar, Workday displays Totals, then Additional Totals.

When you or workers enter time using high-volume time entry, Workday displays a Totals section and an Additional Totals section on the confirmation page.

Next Steps

(Optional) Translate calendar totals:

1. Access the View Time Entry Template report.
2. On the Effective-Dated tab, expand the Totals section.
3. From the related actions menu of the label you want to translate, select Translation > Translate Instance.
4. Select a Target Language.
5. In the Text Value column, enter the translated label.

Related Information
Examples
2022R2 What's New Post: Enable Configurable Totals in Time Tracking
2023R1 What's New Post: Increase Number of Additional Totals

Set Up Time Shift Options

Prerequisites

- Create a time entry template.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

You can configure how Workday assigns dates to time blocks and calculated time offs that are part of a time shift. You can also control how Workday handles time blocks and calculated time offs that cross the day breaker. Configuring time shift options enables you to comply with commonly negotiated overtime and premium pay policies.

You can split time blocks and calculated time offs at the day breaker or group them into shifts. When you group time blocks and calculated time offs, Workday adds a shift date to each block based on the dates for the:

- Beginning of a shift.
- End of a shift.
- Majority of a shift.

You can use the shift date on the time block and calculated time off when you create these types of time calculations:

- Consecutive day.
- Minimum daily hours.
- Minimum weekly hours.
- Standard overtime.
- Time block conditional.
- Time block create.

Steps

1. Access the Create Time Entry Template or Edit Time Entry Template task.
2. On the Effective-Dated tab, expand the Time Shift section
3. Select a time shift option:

Option	Description
Workday Defined	Workday defines a time shift as a grouping of time blocks and calculated time offs that can each last up to 24 hours. You can separate time blocks within a shift using meals and breaks, which can be up to 24 hours long.
Custom	You can create your own shift definition by customizing the separations for the time block and calculated time off that count toward time shifts.

4. Select an option from the Group Time Blocks for Shift Based On prompt to define a shift date for shifts that cross the day breaker:

Option	Description
Begin of Shift End of Shift	Select to set the shift date to the beginning or end date for the shift. Example: You configure a worker's time entry template to have a 1-hour maximum meal

Option	Description
	duration. They work on Monday from 20:00 to midnight and then take a 1-hour meal break. They check in again at 01:00 on Tuesday and check out at 05:00. The meal break is within the 1-hour maximum, so Workday groups both time blocks into the same shift. When you group time blocks based on: • Begin of Shift: Workday sets the shift date of each time block to the date for Monday. • End of Shift: Workday sets the shift date of each time block to the date for Tuesday.
Majority of Shift	Select to set the shift date to the day on which the worker works the most hours in the shift. Workday determines the shift date by comparing the duration between the calculated In time of the first time block in the shift to the day breaker and the duration between the day breaker to the calculated Out time of the last time block in the shift. If there’s more time before the day breaker, Workday will assign the date of the first part of the shift. If there’s more time after the day breaker, Workday will assign the date of the last part of the shift. When there’s an equal amount of time before and after the day breaker, Workday will assign the date of the first part of the shift. Example: You configure a worker's time entry template to have a 2-hour maximum meal duration. They work on Wednesday from 22:00 to midnight and then take a 1-hour meal break. They check in again at 01:00 on Thursday and check out at 06:00. Workday groups the 2 hours worked on Wednesday and the 5 hours worked on Thursday into the same shift. The majority of the shift is on Thursday, so Workday sets the shift date of both time blocks to the date for Thursday.
Split by Day Breaker	Select to use a calculated date for time blocks. Example: A worker has a calendar with a 02:00 day breaker. They work a 4-hour shift from 01:00 to 05:00. Workday doesn't add a shift date to the time block. Workday tags the hour before the day breaker and the 3 hours after with different calculated dates.

Calculated time offs follow the same grouping rules as time blocks, based on the selection in the Group Time Blocks for Shift Based On prompt. Shifts can be entirely made up of calculated time offs.

Example

You want to configure time shift options for shifts that cross a week breaker.

On the time entry template, you group time blocks for a shift based on the beginning of the shift. The week begins on Monday.

Scenario: A worker checks in at 20:00 on Sunday and checks out at 04:00 on Monday. Workday creates these time blocks based on the day breaker:

Day Breaker	Reported Time Block	Calculated Time Block	Shift Date
Midnight	20:00 - 00:00	20:00 - 00:00	Sunday
	Sunday 00:00 - 04:00	Sunday 00:00 - 04:00	Sunday
Non-midnight	Monday 20:00 - 04:00	Monday 20:00 - 00:00	Sunday
01:00	Sunday	Sunday 00:00 - 01:00	
		Sunday 01:00 - 04:00	
		Monday	

Workday includes the hours worked on Monday and tagged with a Sunday shift date in the total for Sunday. When the worker submits hours for the week ending on Sunday, Workday includes the Monday hours tagged with the Sunday shift date.

Calculations based on the shift date include the hours from 00:00 to 04:00 on Monday in the totals for the previous week.

Scenario: When the same worker, who's scheduled shift is from Sunday at 20:00 to Monday at 04:00, calls in sick, a calculated time off is created. For calculated time offs, the reported time block isn't split by the day breaker when crossing weeks:

Day Breaker	Reported Time Off Block	Calculated Time Off Block	Shift Date
Midnight	20:00 - 04:00	20:00 - 00:00	Sunday
	Sunday	Sunday 00:00 - 04:00	Sunday
Non-midnight	20:00 - 04:00	Monday 20:00 - 00:00	Sunday
01:00	Sunday	Sunday 00:00 - 01:00	
		Sunday 01:00 - 04:00	
		Monday	

Next Steps

On the Create Time Calculation or Edit Time Calculation tasks, configure any calculations that evaluate shifts for Workday to calculate time according to the shift date.

Related Information

Examples

The Next Level: Overview of Shift

The Next Level: Advanced Shift

The Next Level: Time Tracking Advanced Concepts

Steps: Set Up Project Time Entry

Prerequisites

- Create time entry codes.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

Configure time entry templates and time calculation tags so that workers can enter time for projects and project tasks.

Steps

1. Access the Create Time Entry Template task.
2. Select a Default Time Entry Code for project time entry.

   Workday applies the default time entry code to any time entered for projects. To track project time separately from nonproject time, use a default time entry code that you dedicate to project time entry. Then use eligibility for time code groups to make other time entry codes available to the worker. Selecting a default time entry code that tracks both project and nonproject time makes it difficult to separate them for calculations and reports.
3. (Optional) On the Noneffective-Dated tab, expand the Calendar section.
   a) Select Enter Time by Type to enable workers to enter multiple combinations of quantity-based time types and active worktags at once.
   b) Update the *Enter Time* business process security policy so that workers can use this option.

   If you select Auto-fill from Prior Week in addition to Enter Time by Type:

   - Workers can auto-fill time blocks from a prior week into their calendar.
   - The Also Copy Details and Comments check box is replaced with the Do not copy hours check box.
   - Workers can select Do not copy hours to copy projects from a prior week without copying hours.

   Workers can also access the Set Default Projects task through Enter Time by Type. Workers can save projects that Workday automatically populates in the time entry grid. To improve task performance, Workday recommends that workers save fewer projects or update saved projects on a less frequent basis.
4. On the Noneffective-Dated tab, expand the Projects section.

   Select time entry options:

Option	Description
Enable Time Entry by Project	When enabled, workers can select their assigned projects and tasks from the Time Type prompt when entering time. The default time entry code of the time entry template doesn't display in the Time Type prompt because Workday automatically applies it to the project time.
Require Project Role for Time Entry	Requires workers to select a project role when they enter time using these time entry methods:

Option	Description
	• Auto-fill from Prior Week. • Calendar-based time entry. • Enter Time by Type. • Quick Add. When enabled, Workday also displays Project Role on the Review Project Time task. Workday doesn't require workers to select a project role when they enter time through check-in or check-out events. Workday populates the Project Role field with roles based on the worker's assignments on a project's resource plan line.
Display Phase and Task on Time Block	Display project phase and task information on a time block for active projects. Workday uses start and end dates for the task resource and resource plan line to drive which resource plan line is available for time entry. During project time entry in Time Tracking, only workers assigned as task resources can enter time to a project plan task. If a project plan task has no task resources, then all workers on the resource plan can see and log time to that task. They can log for both billable and nonbillable projects. If you're using Workday Project Tracking, you can add workers to projects, but you can't add workers to a specific project plan task. When workers enter time for a project, they see all of the project plan tasks in the project and can enter time for any task. Restrict which projects and tasks display in the Time Type prompt by using project plan task Start Date and End Date.
Use High Volume Projects Prompt	Enable workers to bypass their assignments and select from all active projects and tasks when entering time. Selecting this option causes the Time Type prompt to be empty until workers search for their project. They can also browse through all active projects and tasks in the Projects and Project Plan Tasks folders. This option is useful if you have large volumes of projects or don't assign projects and tasks to individual workers.
Create Independent Events	Create separate approval events for each project that has time logged against it that week or time period. This way, the approval status of 1 project doesn't hold up the approval for another project. Approvers for multiple

Option	Description
	projects receive, and must act on, separate approval events for each project.
Display Project Customer on Enter Time by Type	Select to display the project customer on the Enter Time by Type time entry method.
Show Totals on Enter Time by Type	Select to display the Time Totals section on the Enter Time by Type time entry method.
Hide Do Not Bill	Select to hide the Do Not Bill check box on the Enter Time for Worker, Enter Time by Type, and Micro-Edit time entry methods.

5. (Optional) Complete the Set Default Projects section:

Option	Description
Display Project Customer Display Project Owner	Select to add Project Customer, Project Owner filters, or both, to the Set Default Projects task. Additional filters make it easier for workers to quickly select relevant projects.
Enable Project Search	Select to enable a Project Search button on these time entry methods: • Time entry calendar. • Quick Add • Check-In • Edit Time Clock Event When workers click Project Search, they can search for and select multiple projects, project tasks, or both and then click Update Results to add those projects to a grid view. They can then apply the projects and project tasks to their time entry.

6. On the Effective-Dated tab, expand the Eligibility section.

   Select a Worker Eligibility rule so that only workers who enter project time are eligible for this time entry template.
7. (Optional) Create Time Calculation Tags on page 2735.

   Create a *Project Time* time calculation tag and associate it with the default time entry code for project time entry.

   If you track project time only and don't perform time calculations, you don't need to create time calculation tags. If you use the Review Time or Review Project Time reports to review and approve project time blocks, create a time calculation tag for project time. These reports pull in time blocks based on their calculation tags.

Next Steps
Assign the worker to a project or resource plan.
Related Information
Examples

Steps: Set Up Resource Plans

Configure Task Resources

Steps: Set Up Project Tracking

2024R1 What's New Post: Set Default Projects

The Next Level: Time Tracking Reports, Dashboards, and Integrations
The Next Level: Project Tracking

Set Up Time Entry Templates for Enter Time by Type (New!)

Prerequisites
Security:

- *Process: Put Reported Time Blocks for Worker* domain in the Time Tracking functional area or the Time Tracking Hub functional area.
- *Self Service: Time Calendar* domain the Time Tracking functional area.
- *Worker Data: Time Calendar* domain in the Time Tracking functional area or the Time Tracking Hub functional area.

Context

A time entry template enables you to configure options for project time entry for your workers.

Steps

1. Access the Edit Time Entry Template task.

   See Set Up Time Entry Templates in the Workday Administrator Guide.
2. Select a template to configure project time entry for your workers.
3. Select options in the Calendar section.

Option	Description
Default Calendar View	Select Weekly. When the default calendar view is Monthly, you can also access the Enter Time by Task (New!) task. Note: When you use Enter Time by Type (New!) as the default time entry method, you can't set Monthly as the default calendar view. You must enable Monthly as an additional calendar view to use Enter Time by Type (New!) as default time entry method.
Entry Methods	Enables time entry methods on the Weekly calendar: • Auto-fill from Prior Week • Quick Add • Enter Time by Type • Enter Time by Type (New!) You must select Enter Time by Type (New!) for it to display on the Actions prompt on the Weekly calendar. The other time entry methods are optional. From the Default Time Entry Method prompt, select *Enter Time by Type (New!)* to enable it as the first task on the Time worklet on the Workday Home page.

Option	Description
	When there is no selection for the Default Time Entry Method, the Enter Time calendar opens for you.

4. On the Projects tab, select these options:

Option	Description
Require Project Role for Time Entry	Requires workers to select a project role when they enter time using these time entry methods: • Auto-fill from Prior Week • Calendar-based time entry • Enter Time by Type • Enter Time by Type (New!) • Quick Add When enabled, Workday also displays Project Role on the Review Project Time task. Workday doesn't require workers to select a project role when they enter time through check-in or check-out events. Workday populates the Project Role field with roles based on the worker's assignments on a project's resource plan line.
Hide Do Not Bill	When enabled, hides the Do Not Bill check box on Micro-Edit and these time entry methods: • Enter Time by Type • Enter Time by Type (New!) • Enter Time for Worker
Enter Time by Type (New!)	When enabled, the search results view displays columns for: • Project Customer • Project Phase • Project Task • Project Owner

Related Information

Tasks

Enter Time for Worker Using Enter Time by Type (New!) on page 2845

Steps: Set Up Geofences for Mobile Time Entry

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.

3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- Create time entry templates.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

You can create geofences to prevent workers from checking in or out of work while using the Workday mobile application outside of a defined location. When you use Workday Scheduling, you can ensure workers only check in and out on mobile from the location where they're scheduled to work. You can configure 1 or more geofences for each time entry template. Workers are assigned geofence locations based on time entry template eligibility.

Example: You want to configure geofences that apply to the IT Organization. On the IT Organization time entry template, you add geofences for the San Francisco and San Jose locations. Members of the IT Organization can only check in to work from their mobile devices when they are within the San Francisco or San Jose geofences.

Note: You can't enable this feature when you enable worker edits to the Check In or Check Out tasks.

Steps

1. Enable *Standard Mobile Check-In*.
    a) Access the Edit Tenant Setup - HCM task.
    b) In the Time Tracking section, select the Enable Standard Mobile Check-In check box.

       See Steps: Enable Time Tracking for Mobile on page 2645.
2. Ensure that you enabled mobile check-in and check-out in your tenant.
    a) Access the Edit Tenant Setup - System task.
    b) In the Mobile section, make sure that the Disable Check In/Out on Mobile check box is clear.
3. Ensure that you enabled location services in your tenant.
    a) Access the Edit Tenant Setup - System task.
    b) In the Location Services section, make sure that the Disable Location Service check box is clear.

       When you enable geofences, Workday prompts workers to enable location services on their mobile device.

4. Configure geofences.
   a) Access 1 of these tasks:
      - Create Time Entry Template
      - Edit Time Entry Template
   b) (Optional) To configure geofences by scheduled shift location, select the Enable Workday Scheduling check box.
   c) On the Noneffective-Dated tab, expand the Location Settings section.
   d) Add a new row to create a geofence for each location. Workers you assigned to this time entry template will be able to check in and out from all the locations you add.

      You can select from existing Location values that include latitude and longitude. When you select an existing location, the latitude and longitude fields aren't editable from the time entry template.

      To modify the latitude and longitude for an existing location, access the related actions menu of the Location and edit the Location Details.

      You can also create a geofence for a new geographic location by entering custom Latitude and Longitude values.
   e) Define the length of the Radius for each geofence.

      Workday recommends making each radius greater than 100 meters to improve the functionality of the geofence. The accuracy of geofences is dependent on device hardware and the core location API functionality in the operating system.
   f) (Optional) To configure geofences by scheduled shift location, select the Enable Geofences by Scheduled Shift Location check box. You can also set thresholds of up to 120 minutes for check-in and check-out.
5. (Optional) Display a geofence map for workers on the Check In/Out task.

   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.

   a) ../../../../manage-workday/tenant-configuration/Machine-Learning-and-Innovation-Services/enable-innovation-services-feature-and-data-contribution.dita.
   b) On the Available Services tab in the Cross Application Services category, select the Third-Party Map service.

Result

When a worker attempts to check in or out outside the radius for the geofence, they receive an error message. The error message instructs them to move closer to their work location before attempting to check in or out. If you enable the Third-Party Map service, the worker sees a real-time map that displays their location relative to their work location.

You can use the Time Clock History report to view successful check-in and check-out events for a worker. Workday doesn't store location information in the report.

Related Information

Concepts

Concept: Scheduling Organizations on page 2159

Examples

2020R1 What's New Post: Geofencing for Check-In and Check-Out Events on Mobile

Reference: Edit Tenant Setup - System

Set Up Third-Party Scheduling

Prerequisites

- Create a time entry template.

- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

When you import scheduled shifts from third-party systems, you can enable Workday to retrieve related attributes from workers' imported shifts. On both desktop and mobile, when workers check in using the Check In or Add Clock Event tasks, Workday can automatically populate the time entry code, position, and worktags using the data imported from the third-party scheduling system.

Note:

- Workday doesn't currently support project time types on third-party schedules.
- You can't enable both third-party scheduling and Workday Scheduling.

Steps

1. Access 1 of these tasks:
    - Create Time Entry Template
    - Edit Time Entry Template
2. On the Noneffective-Dated tab, expand and complete the Third-Party Scheduling section.

Option	Description
Import from Third-Party Schedules	Select to use the *Import Ad Hoc Schedules* web service to import schedule events as schedule blocks. When workers check in, Workday searches for the nearest schedule block start time within a 12-hour timeframe. If Workday finds a schedule block for the worker, it applies any values specified in the block as default values on the check-in event. Example: You configure the *Channel* worktag with the value of Direct in the time entry code. The third-party scheduling event has a *Channel* attribute with the value of Partner. Workday automatically populates the *Channel* worktag with the value of Partner when the worker checks in. When Workday finds no scheduled shift or no value for an attribute in the schedule block, Workday uses the time entry code on the imported schedule event. Example: You configure the *Channel* worktag with the value of Direct in the Hours Worked time entry code. The third-party scheduling event has no attributes but specifies the time entry code to be Hours Worked. Workday automatically populates the *Channel* worktag with the value of Direct when the worker checks in. When there isn't a time entry code on the imported schedule event, Workday uses the default time entry code from the worker's time entry template and applies the value specified there. Example: You configure the *Channel* worktag with the value of Direct in the time entry code on the time entry template. The third-party scheduling event doesn't specify a time entry code or value for the *Channel*

Option	Description
	attribute. Workday automatically populates the *Channel* worktag with the value of Direct when the worker checks in.
Use Time Tracking Worktag Defaults	When you select the Import from Third-Party Schedules check box and: • Clear the Use Time Tracking Worktag Defaults check box, if both the scheduled shift and the time entry code don't specify values for a worktag, Workday doesn't assign a value to that worktag. • Also select the Use Time Tracking Worktag Defaults check box, if both the scheduled shift and the time entry code don't specify values for a worktag, Workday evaluates the time entry template configuration and applies worktag values to the check-in event according to the worktag precedence rules. See Reference: Worktag Precedence in Time Entry on page 2711. Example: You configure the *Store* worktag to default from the organizational assignment. If both the scheduled shift and the time entry code contain no value for *Store*, and you: • Clear the Use Time Tracking Worktag Defaults check box, then Workday doesn't assign a default value to *Store*. • Select the Use Time Tracking Worktag Defaults check box, then Workday populates the *Store* worktag with the default value from the worker's organizational assignment.

Related Information

Concepts

Concept: Importing Work Schedules

Example: Set Up Geofences by Scheduled Shift Location

This example illustrates how to configure geofences for shifts that are defined in Workday Scheduling.

Context

Your organization has 3 locations. Your workers check in and out on their mobile devices. You want to ensure that your workers can only check in at the locations where they're scheduled to work. You also want to prevent workers from checking in earlier than 10 minutes before their scheduled start time.

Prerequisites

- Enable Time Tracking for mobile. See Steps: Enable Time Tracking for Mobile on page 2645.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Steps

1. Access the Edit Time Entry Template task.
2. From the Time Entry Template prompt, select *USA - Scheduling - In/Out*.
3. Ensure that the Enable Workday Scheduling check box is selected.
4. On the Effective-Dated tab, expand the Time Entry section.
5. In the Time Entry Restrictions section:
    a) Select Restrict Check-In Before Scheduled Start Time.
    b) In the Threshold Before Restricting Check-In (Minutes) field, enter *10*.
6. On the Noneffective-Dated tab, expand the Location Settings section.
7. In the Geofences for Mobile Time Entry grid, add 3 rows and enter these values:

Location	Radius	Unit
San Francisco	120	Meter
San Jose (CA)	120	Meter
Oakland	120	Meter

8. Select Enable Geofences by Scheduled Shift Location.
9. In the Threshold Before Scheduled Start Time (Minutes) field, enter *10*.
10. In the Threshold After Scheduled End Time (Minutes) field, enter *20*.
11. Click OK and Done.

Result

Workers can only check in at their scheduled shift locations. They can check in up to 10 minutes before their scheduled start time. For the first 20 minutes after their scheduled end time, they can only check out at their scheduled shift locations.

Concepts: Time Entry Templates
Concept: Effective Dating for Time Entry Templates

You can apply effective dates to time entry templates to support changes in legislation, union agreements, or company policy, ensuring accurate time entries for workers. Example: When legal changes go into effect at the start of the year, a time tracking administrator can update configurations ahead of time and future-date the changes to go into effect on January 1.

Effective dating enables time tracking administrators to create time entry template configurations with effective-dated elements that impact time calculations, totals, and time entry recording. You can view current, past, and future effective-dated configurations to easily track changes over time.

Workday automatically updates time entry templates that were created before the 2025R1 release on 2025-03-15 to have effective-dated data with an effective date of 1930-01-01. When you edit an existing time entry template, you can edit data for existing effective dates or create new effective dates. Example: You have an In/Out time entry template. When you edit that template, you see an existing configuration with an effective date of 1930-01-01. You create a new configuration with an effective date of 2025-09-01 and update the eligibility rule.

When you change a historic time entry template configuration and the changes impact time calculations, you must run calculations for the impacted time period. To avoid negative payroll results, submit all time blocks for approval before you run payroll.

Delete Time Entry Templates or Effective-Dated Data

You can delete effective-dated configurations from time entry templates.

When the time entry template has only 1 effective-dated configuration or you want to delete an entire time entry template with multiple effective-dated configurations, use the Delete Time Entry Template task.

When a time entry template has more than 1 effective-dated configuration, use the Delete Time Entry Template Effective-Dated Data task to delete any of the configurations. When you delete data for an effective-dated time entry template that's used in a time block, we recommend rerunning the time calculations for that period.

Copy of an Effective-Dated Time Entry Template

To create a new effective-dated time entry template with a different date but similar configuration, copy an existing time entry template. To copy effective-dated time entry templates, use the Copy Time Entry Template task.

Related Information

Concepts

Concept: Worker Eligibility for Time Tracking on page 2828

Examples

2025R1 Feature Release Note: Effective-Dated Time Entry Templates

Concept: Geofences for Mobile Time Entry

Overview

Geofences are circular geographic areas surrounding a latitude and longitude point with a radius set in meters. You can create geofences to define where workers can check in or out while using the Workday mobile application. When you use Workday Scheduling, you can configure geofences to prevent workers from checking in or out at locations where they aren't scheduled to work.

Workday Mobile Application

Geofences only apply when workers are using the *Standard Mobile Check-In* time entry method to check in and out. Workday doesn’t prevent workers from checking in or out when they're outside geofences and they use a different time entry method. Example: Time entry calendar. If you want to use geofences, ensure that workers don't have access to other methods of entering time on mobile.

Geofences are only available on the Workday mobile application for iOS and Android. Workday doesn't prevent workers from entering time in Workday from a mobile browser or from a desktop.

Location Data Privacy

When you enable geofences, Workday:

- Prompts workers to enable location services on their mobile devices. If a worker decides not to enable location services, they won't be able to check in our out.
- Prevents workers from checking in or out when they're outside the geofence.
- Compares a worker’s location to the geofence coordinates on their device then deletes the location data.
- Doesn't keep a record of workers' attempts to check in or out from outside the geofence.
- Doesn't store your workers' locations and doesn't send the locations to Workday servers.
- Doesn't store the location in the internal storage or hard drive of the device.

Recommendations

Workers can decide not to enable location services on their mobile devices; therefore we recommend having an alternate method of checking in and out available. Example: A computer or kiosk at the work location where workers can check in and out.

To protect the data privacy of your workers, Workday doesn't offer the ability to report on your workers' locations or unsuccessful check-in or check-out events. You can report on workers' successful check-in and check-out events by using the Time Clock History report. This report doesn't include location data.

Related Information

Concepts

Concept: Scheduling Organizations on page 2159

Examples

2020R1 What's New Post: Geofencing for Check-In and Check-Out Events on Mobile

Reference: Edit Tenant Setup - System

Concept: Project Time Entry

When you integrate Workday Time Tracking with Workday Projects, you can:

- Create and manage projects.
- Enable workers to enter time through Time Tracking for projects and tasks.
- Track project work.
- Analyze project workers' time.
- Evaluate the labor cost impact to projects.
- Analyze project costs.
- Use advanced resource management.

Configuration Considerations

A worker can select a project, role, or task when entering time when you:

- Add the worker to a resource plan for a project or a task.
- Configure the worker's time entry template to track project time entry.

Workday assigns the default time entry code of the time entry template to any time that you enter for projects and tasks. The default time entry code determines whether the worker enters hours or in/out times for their projects and tasks. Assign workers who enter project time to a template that uses a default time entry code dedicated to project time entry. You can enable workers to enter additional time entry codes by adjusting eligibility rules for time code groups.

If you track project time only and don't perform time calculations, you don't need to create time calculations, time calculation tags, or time calculation groups.

If you use the Review Time or Review Project Time reports to review and approve project time blocks, create a time calculation tag for project time. These reports pull in time blocks based on their calculation tags.

Billable Projects

Once you approve a worker's billable project time entries, Project Billing and Revenue processes them as billable transactions. If you edit an approved time block, you must submit and approve it again for it to become a billable transaction. You can use the Review Billable Project Transactions task to view, edit, and approve the transactions or to transfer the time to a different project.

The status of the time block reflects the billing status of the associated transaction. When the billing status of the transaction is one of the following, you can no longer edit the time block:

- Billed: The billable transaction has been invoiced.
- Billing in Progress: The billable transaction is included in a customer invoice proposal.

If you need to make changes after this point, you can delete the time block and re-add the updated information in a new time block. Deleting a billed time block creates a negative billing transaction that reverses the original transaction.

You can prevent the deletion of time blocks by configuring which of these activities locks them:

- Billing.
- Revenue recognition.
- Project.

Use the Set Up Project Billing Configuration task to configure this. To allow specific users to bypass the time block deletion lockdown for periods that aren't closed, assign them to the *Manage: Exemption from Deletion Lockdown for Project Billing* security domain.

Time Tracking offers a Do Not Bill option when you enter time for billable projects and project plan tasks. Although you can select the option at both the project and task levels, the option only affects billing for tasks. If you select this option at the project plan task level, Workday Projects tracks the transaction but doesn't bill the time. Selecting this option at the project level has no effect in Workday Projects. You can still select this option for tracking and reporting purposes.

Normalized Project Labor Costing

Workday enables you to evaluate the labor cost impact to projects, based on variances of a worker's daily reported time versus scheduled time. To allocate fully burdened costs across project time blocks in a day, use the normalization factor time block attribute. The normalization factor calculation divides the scheduled hours for a calculated day by the total reported hours for a day, including time off.

Once you approve the normalized project time block, if the worker has a reported project or project task, Workday immediately calculates and stores the approval on the worker time block.

When scheduled hours don't equal reported hours for a day, Workday stores the normalized factor needed to derive a normalized cost for project time blocks.

When you:

- Add a new reported time block to a day that contains project time blocks, Workday recalculates the normalization factor for all project time blocks or project tasks for the day.
- Change a project time block or project task to a time entry code, Workday removes the normalization factor.

Use the Normalization Factor report field on the Project Time Blocks report data source to determine the normalized cost for each project time block.

You can only access normalization factor values through custom reports.

Example: You create a matrix report to summarize the normalized labor costs grouped by Project, per period, when you multiply values for:

- Reported Quantity (on the project time block)
- Fully Burdened Cost
- Normalization Factor

Related Information

Tasks

Set Up Project Billing Configurations

Examples

Concept: Project Billing

Steps: Set Up Project Tracking

Review Billable Project Transactions

Concept: Time Shifts

A time shift is a grouping of consecutive time blocks that apply to workers who report In and Out times. A time shift can be defined with either:

- Only time worked.
- Only time off.

- Both.

Time shifts enable you to base calculations and validations on a worker's entire shift, whether or not the shift is fully contained within the worker's defined work day. Eligibility for time shift settings is based on worker eligibility for the time entry template on the last day of the week. The day breaker doesn't split time shifts, as it does with time blocks.

While time shifts can cross a week boundary, to ensure accurate time calculations and calendar totals, avoid time shifts that extend beyond 48 hours into the second week.

When you change time tracking eligibility in the second week of a shift that crosses from 1 week to another, use these reports to identify and view impacted shifts:

- Find Shift Blocks Crossing Weeks with Eligibility Changes
- View Shift Blocks Crossing Weeks with Eligibility Changes Results

If you configure daily evaluation of worker eligibility for time calculations, use the Time Calculation Eligibility Changes report instead.

When you find impacted shifts in the reports, you can make adjustments using the Adjust Calculated Time task.

Time Shift Options

Workday groups consecutive time blocks based on the type and duration of time block separations:

- Meal
- Break
- Out

You can use a Workday-defined shift definition or create a custom definition when you configure your time entry template.

Workday-Defined Shift

Workday defines a time shift as a grouping of time blocks, each with a maximum duration of 24 hours. When a time block ends with:

- A meal or break, the next time block can start anytime within the next 24 hours to be a part of the shift. When a break is longer than 24 hours, Workday ends the shift.
- An out, Workday ends the shift unless the next time block starts immediately afterward. Example: When a time block ends with an out at 10:35, and the next block begins at 10:35, Workday includes both blocks in the same shift.

Examples to enable you to determine what qualifies as a Workday-defined time shift.

Time Blocks Worked (Out Reason)	Time Shift?
08:00 - 12:00 (Break) 13:00 - 17:00 (Out)	Yes: Break duration is less than 24 hours.
08:00 - 12:00 (Out) 13:00 - 17:00 (Out)	No: Out duration is greater than zero.
08:00 - 10:00 (Out) 10:00 - 12:00 (Out)	Yes: Out duration is equal to zero.
Monday 08:00 - 11:00 (Meal) Tuesday 10:00 - 17:00 (Out)	Yes: Meal duration is less than 24 hours.
Monday 08:00 - 11:00 (Meal)	No: Meal duration is greater than 24 hours.

Time Blocks Worked (Out Reason)	Time Shift?
Tuesday 12:00 - 17:00 (Out)	

Custom Shift Definition

You can create a custom shift definition by customizing time block separations that count toward time shifts.

Example: You configure consecutive time blocks within the same shift to have separations that are less than these durations:

- 1-hour out.
- 2-hour meal.
- 30-minute break.

When you set maximum durations, workers can still report separations longer than the limit. When workers enter separations that exceed the maximum duration, Workday ends the shift at the time block immediately preceding the separation. The new shift starts in the time block immediately after the separation.

You can use time entry validations to alert workers when they report separations longer than a certain duration.

Shift Date

When you configure time shifts and group time blocks based on the beginning, end, or majority of a shift, Workday determines a shift date for each time block. You can define how Workday determines the shift date for time blocks that cross days.

Example: You configure a worker's time entry template with a maximum 1-hour meal break, and you group time blocks for shifts based on the date when the shift begins. The worker enters time from 18:00 to 23:00 on Friday. They take a 1-hour meal break, check in again on Saturday, and work from midnight to 03:00. Workday groups both time blocks into a single shift and sets the shift date of both blocks to the date on Friday.

The shift date also impacts time approval and time calculations. When you:

- Create time calculations, you can base calculations that have a Time Day Based On prompt on the shift date.
- View time blocks in the Edit and Approve Time or Review Time reports, Workday displays the reported time according to the shift date on the time blocks.

Calculated time off blocks receive a shift date when advanced shift is configured on the time entry template. Time calculations that reference shift date also use this for calculated time offs.

Related Information

Concepts

Concept: Daily Evaluation of Worker Eligibility for Time Calculations on page 2801

Examples

The Next Level: Overview of Shift

The Next Level: Advanced Shift

Worktags for Time Entry

Setup Considerations: Worktags in Time Tracking

You can use this topic to help make decisions when planning your configuration and use of worktags in Time Tracking. 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

Worktags in Time Tracking enable you to capture and report on information about worker hours.

Business Benefits

- Expedite time approval by routing submitted hours to the correct manager when location or cost center worktags are assigned to time blocks.
- Guide data entry on tasks to ensure that workers enter valid data, reducing the need for input error messages.
- Inform your decision by using custom worktags to capture values important for your company reporting.
- Make it easy to track details associated with workers such as cost center, job profile, and location.
- Save time, ensure accuracy, and easily associate information with time blocks by automatically applying default worktag values.

Use Cases

Worktags in Time Tracking enable you to:

- Capture information about worker hours for costing and journal entries in the Workday Payroll general ledger.
- Capture information about worker hours for Project labor costing.
- Populate time blocks automatically with related worktag values from a worker's project, project plan task, or organizational assignments.
- Categorize and report on time entries.
- Classify information for analysis in reports, and send the information to Payroll and Projects.
- Import location information with work schedules for workers working at multiple locations.
- Route time entries for workers who work at multiple locations to the correct manager for approval.
- Route a worker's training hours to a different cost center than configured in Workday Payroll.
- Capture information about the hours of multiposition workers ensuring they're paid correctly for each position.
- Label manufacturing machines and track their use. You can require workers to select the machine they've used when they enter their hours.

Questions to Consider

Questions	Considerations
What types of time tracking data do you want to categorize for analysis?	You can categorize time against costing worktag types for use in financial reporting and costing. Example: For a specific project, you categorize hours worked to the default cost center of the project.
How can worktags automate or simplify data input?	You can automate data input on time entry by: • Applying organization assignment worktags to workers' time entries. Example: You can configure Workday to automatically apply

Questions	Considerations
	the cost centers of workers' organizational assignments to their time entries. • Configuring default worktags based on workers' time entry codes. Example: Enable Workday to automatically apply regions to the time entries of hourly workers. • Configuring related worktags. When workers and managers select a worktag, Workday automatically assigns the default values of related worktags to the time entry. • Configuring Workday to apply default values from projects or project plan task to time entries. • Configuring Workday to populate default worktag values that are hidden from workers during time entry. • Populating default *Location* worktag values from the schedule when you use Workday Scheduling and shift-based check-in. For US workers, you can set up tax location mapping (TLM). Payroll maps the reported location from a time block to US tax authority worktags. The worktags include *State*, *County*, *City*, and *Other*. Time Tracking then adds these worktags to the time block. You can simplify time entry tasks by: • Enabling workers to add worktags directly during time entry. • Presenting workers and managers with a filtered list of worktags they can select from. Example: You can ensure workers entering time for the western region see only the cost center worktags relevant to that region.
What Time Tracking worktags does Workday provide?	Workday supports these worktag types for Time Tracking: • *Allocation Pool* • *Appropriation* • *Business Unit* • *Cost Center* • *Fund* • *Gift* • *Grant* • *Job Profile* • *Location* • *Program* • *Region* You can also configure:

Questions	Considerations
	• 15 custom worktag types. • 10 custom organization types.

Recommendations

On time entry templates, configure default worktags from organizational assignments to limit the data workers need to enter.

Requirements

Use the Maintain Worktag Usage report to enable Workday to use worktags in Time Tracking.

Limitations

No impact.

Tenant Setup

You can select tenant-wide configurations on the Edit Tenant Setup - HCM task to enable mobile users to enter worktags when checking in. Select the Standard Mobile Check-In (Time) check box. See Reference: Edit Tenant Setup - HCM.

Security

Configure these domains in the Worktags functional area:

Domains	Considerations
Manage: Related Worktags	Administrators can manage default and allowed values for worktag types enabled for related worktags.
Set Up: Worktags	Administrators can enable and maintain worktags and view related reporting.
Worktag REST API	Administrators can use a web service to retrieve and load default and allowed values for any worktag.

Business Processes

You can configure the *Enter Time* business process to route time approvals by worktags.

Reporting

You can view worktag configurations on the:

- All Time Entry Templates report.
- All Time Entry Template Effective Dates report.
- View Time Entry Template task.

You can use these report data sources to create custom reports on Time Tracking worktag data for your organization:

- All Time Blocks
- All Time Clock Events
- All Time Blocks and Time Block Entries

Integrations

Web Service	Considerations
Get Calculated Time Blocks	Enables you to retrieve calculated time blocks with their related worktags.
Import Ad Hoc Schedules	Enables you to load large batches of scheduled time blocks and their worktag values.
Import Time Clock Events Put Time Clock Events	Enable you to import large and small batches of time clock events with worktag values. When you use the import time web services, Workday runs validations on the data to check for invalid time clock transactions. These web services only support the default validations that are required for related worktags. See Concept: Importing Time Clock Events on page 2865.
Import Reported Time Blocks	Enable you to import time blocks with worktag values.

Connections and Touchpoints

Features	Considerations
Absence	You can configure Workday to include worktag values with time off hours when workers and managers enter time offs through Absence.
Finance	With Workday Financial Management, you can use time entry worktags in account posting rules and as attributes in accounting results.
Payroll	Worktags entered during time entry override any default costing in Payroll that is defined at the worker or earning level. Worktags that define locations flow to Payroll for taxation.
Projects	When workers enter time for projects, you can configure Workday to add worktag values from the reported projects to the time entries.
Scheduling	When you use shift-based check-in, you can populate the *Location* worktag from a scheduled shift location in Workday Scheduling.

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: Worktags

Concept: Worktags

Concept: Project Time Entry on page 2700

Tasks

Configure Related Worktags

Configure Project Cost and Revenue in Project Hierarchies

Set Up Time Entry Templates on page 2673

Steps: Set Up Project Time Entry on page 2689
Create Standard Overtime Calculations on page 2748

Examples

Example: Configure Worktag Rules for Project Cost and Revenue
2024R1 What's New Post: Worktags on Time Offs
2023R1 What's New Post: Default Worktags by Organization in Time Entry
2023R1 What's New Post: Route Time Approval by Worktag

Steps: Set Up Worktags for Time Entry

Context

You can use worktags in Time Tracking to capture information about a worker's hours for costing and other purposes. Example: Enable workers to select a cost center when entering time. Payroll then retrieves the cost center value assigned to time blocks when it pulls in time for a pay run.

Values for costing worktags entered through Time Tracking take precedence over a worker's default costing allocation configured through Workday Payroll.

Steps

1. Access the Maintain Worktag Usage report.

   In the Time Tracking section, add or remove the worktag types that you'd like to make available for time entry.

   Security: *Set Up: Enable Worktags* in the Worktags functional area.
2. (Optional) Steps: Define Custom Worktags.

   Add Time Tracking to the Worktag Usage column if you're using custom worktags.
3. Configure Related Worktags.
   a) The settings you define for related worktags will impact time entry in these ways:

Option	Description
Allowed Values Enabled	Workday only displays these values in prompts.
Required on Transaction	Workers must enter a value for this worktag.
Default Required	Workday automatically populates these values in prompts, unless you disable the Enable Default Values for Related Worktags option on time entry templates.

   You can configure related worktags for Project transactions and tasks to enable project time entry. You can also configure default worktags for project time entry. Workday populates default worktags for projects in this order:

   - Worktag rules configured for the project hierarchy.
   - Default worktags configured for the project.
   - Default worktags configured for the default time entry code on the worker's time entry template.

   b) (Optional) Define related worktag values and actions for each individual worktag.

   On the Details tab of worktag values, you can select the default worktags to populate for related worktags.

   Example: You set Location to Default Required for the *Cost Center* worktag on the Maintain Related Worktag Usage report. You then access the View Cost Center report and select the *San Francisco* cost center. You access the related actions menu of the *San Francisco* cost center and add *US - Central* and *US - West* as Allowed Worktags for the *Region* worktag type.

4. Access 1 of these tasks:

   - Create Time Entry Template
   - Edit Time Entry Template

   a) On the Effective-Dated tab, expand the Time Entry section.
   b) Complete the Worktags section:

Option	Description
Enable Default Values for Related Worktags	Controls whether related worktag default values populate during time entry. Disable the check box if your organization requires workers to positively report their worktag values.
Enable Related Worktags for Project Time Entries	Enables Workday to automatically populate and validate required and allowed worktag values when workers enter time for projects. Workday derives project-related worktag default values on time entries as of the worker's start date of the week. This occurs when a reported project is in a project hierarchy with worktags for employees or contingent workers who use the Enter Time by Type or Quick Add time entry methods.
Primary Worktags	During time entry, Workday displays each primary worktag as its own prompt and in the same order you define in the grid. You can define up to 10 primary worktags.
Additional Worktags	During time entry, Workday displays additional worktags together in a single Additional Worktags prompt. For time entry tasks with a single Worktags column, Workday displays both primary and additional worktags in the same column.
Hide from Self Service	When a self-service user enters time, this worktag won't be available for edit, but Workday will apply any defaults you've configured for it. The worktag and its associated rules will be available for users with the security access to enter time for the worker.
Default from Organizational Assignment	When selected, Workday defaults the worker's organizational assignment for this worktag type.

   Security: *Set Up: Time Tracking* in the Time Tracking functional area.

5. Create Time Entry Codes on page 2657.

   Associate worktags to a time entry code.

6. Steps: Set Up Time Requests on page 2717.

   Associate worktags to time requests. You can also select a default worktag value that workers enter with their time request. You can select Workday-delivered or custom worktags, but project worktags aren't supported.

Related Information

Concepts

Concept: How Payroll Processes Calculated Time on page 2833

Examples

Setup Considerations: Worktags

Reference: Worktag Types

2022R2 What's New Post: Default Worktags by Organization in Time Entry

Steps: Route Time Approval by Worktag

Prerequisites

Add the *Cost Center* and *Location* as primary worktags on the time entry template.

Context

You can route time entries with *Cost Center* or *Location* worktags to the relevant manager's My Tasks for approval.

Steps

1. Access 1 of these tasks:

   - Create Time Entry Template
   - Edit Time Entry Template

   Select 1 or both of these worktags from the Route Time Approval by Worktags prompt:

   - *Cost Center*
   - *Location*

   Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.
2. Edit Business Processes.

   Add an *Approval* step on the *Enter Time* business process to identify the cost center or location manager as the approver of the time entry.
3. Create Business Process Condition Rules.

   Add a condition rule on the *Approval* step of the *Enter Time* business process to determine whether the time block is associated with a *Cost Center* or *Location* worktag.

Related Information

Examples

Concept: My Tasks

2023R1 What's New Post: Route Time Approval by Worktag

Concept: Hidden Worktags in Time Tracking

You can hide worktags to:

- Simplify time entry while still recording the worktag values.
- Prevent them from being used with a time entry code.

When you configure Time Tracking worktags, hide them using these methods:

Method	Description
On the time entry template, select the Hide from Self Service check box.	Hides the worktag from workers during time entry. Managers and timekeepers can still view and enter values for the worktag. Workday displays the worktag values in the time block details.
On the time entry code, select *Hidden* from the Entry Option prompt.	Hides the worktag from all users during time entry. Workday displays the worktag values in the time block details. Use this option when you want to either: • Populate a worktag value but not enable anyone to edit it. • Ensure users can't enter a value for the worktag.

Reference: Time Tracking and Payroll Worktags

Conditions for passing worktag values from Time Tracking to Workday Payroll vary by worktag. Worktags must meet these requirements for Workday to pass them to Payroll:

Worktag	Required Conditions
Cost Center, *Region*, *Program*, *Fund*, *Business Unit*, *Grant*, *Project*, and custom organizations.	On the Costing tab of the Maintain Organization Types report, set the Use as Financial Worktag setting to *Yes* for the worktag. Associate custom organization worktags to a Custom Organization Worktag Dimension.
Custom worktags 1-15	On the Enable Custom Worktags task, select *Payroll* as the Worktag Usage. To include worktags in payroll journal entries, select both *Financial* and *Payroll*.
Job Profile and *Location*	Workday takes values provided by workers when entering time and passes them to Payroll, but: • Workday passes the *Job Profile* value to Payroll for informational purposes only; it doesn't affect payroll calculation. (The time entry calendar includes a separate Position field when a worker has multiple jobs. Workday passes the worker's position to Payroll with the other time block information.) • The *Location* worktag only affects tax withholdings if you've mapped tax authorities to the location.

Related Information

Examples

Setup Considerations: Worktags

Maintain Organization Types

Set Up Company Taxes by Location (USA)

Reference: Worktag Precedence in Time Entry

- Precedence Criteria on page 2712

- Project and Project Plan Task Criteria on page 2714
- Additional Considerations on page 2717

Precedence Criteria

When workers enter time, Workday prompts them to select 1 of these time types:

- Time off.
- Time entry code.
- Project or project plan task.

Then Workday evaluates these criteria in this order to determine worktag values for time entry:

Worktag Values Applied	Description	Examples
User-entered and imported worktag values	These worktag values always take precedence over all worktag defaulting rules for time entry: • Values entered by users. • Values imported from third-party clock integrations. • Values imported from the Workday Time Kiosk. When users enter a project, time entry code, or time off with a worktag type, they have the option to override any default worktag values.	When a worker enters a project with a worktag type, such as *Cost Center* or *Location*, Workday uses the value reported for the worktag type.
Project or project plan task if entered as the time type	When you enable related worktags for project time entries on the time entry template, Workday checks for worktag default values. First, Workday checks for worktag default values from derived worktag rules on the project hierarchy. When no derived worktag rules exist on the project hierarchy, Workday checks for related worktag values for a reported project. See Project and Project Plan Task Criteria on page 2714.	
Time entry code if entered as the time type	When workers enter a time entry code, Workday checks for worktag default values on the time entry code. You configure default worktag values on the Advanced tab of the Edit Time Entry Code task. Use the Worktag Entry Options grid to select an option for each worktag.	The time entry code, Worked Time, has a *Cost Center* worktag with the default value of Janitorial. When a worker enters time using this time entry code, Workday populates the *Cost Center* worktag of the time entry with the value Janitorial.

Worktag Values Applied	Description	Examples
	See Create Time Entry Codes on page 2657.	
Time off if entered as the time type	Workday populates time offs with worktag default values under any of these conditions: • Managers enter time offs in the Team Absence Calendar report in the Time and Scheduling Hub. • Managers enter time offs for workers through the absence calendar. • Workers enter time off as a time type during time entry. • Workers request time off through the absence calendar. • Administrators adjust time offs with the Maintain Accrual and Time Off Adjustments/Overrides task. See Steps: Set Up Worktags for Time Offs on page 2292.	You configure time off for a sick day to have a default *Region* worktag. When a worker enters time and selects *Sick (Days)* for the time type, Workday populates the time entry with the value of the *Region* worktag.
Location of shift-based check-in	Workday uses the shift scheduled nearest to a check-in time as the source for the location worktag value. To enable Workday to use a worker's scheduled shift location, you must use Workday Scheduling. On the time entry template, select these options: • Enable Workday Scheduling • Enable Shift-Based Check-In • Default Location	A worker checks in for their 9:00 AM shift at 9:10 AM. Workday displays the *Location* worktag for the shift scheduled for 9:00 AM.
Worker's organizational assignment	Workday checks the worker's organizational assignment for worktag values on the worker's primary position. When you configure worktags on the worker's time entry template, select Default from Organizational Assignment.	A worker has this organizational assignment: • *Cost Center* - A • *Location* - Chicago When the worker enters time, Workday populates the *Cost Center* and *Location* worktags with the default values

Worktag Values Applied	Description	Examples
		from the worker's organizational assignment.
Related worktags	When workers enter values for worktags that have related worktags, Workday populates the related worktags with their default values. Set related worktag defaults separately for each worktag type. Workday only populates related worktag values when the primary worktag in the related relationship is manually entered. See Configure Related Worktags.	A worker checks in for a shift in a particular store. They enter a value for the *Store* worktag that has a related *Department* worktag with a default value of Hardware. Workday adds the *Department* worktag with the value, Hardware, to the time entry.
Multiple related worktags	When entering multiple worktags that have the same related worktags but different values, Workday prioritizes the last worktag entered.	A *Cost Center* worktag type has a related *Region* worktag type with a default value of Region 1. A *Location* worktag type has a related *Region* worktag type with a default value of Region 2. A worker adds cost center details and then location information when entering time. The 2 different worktag types have different default values for the related *Region* worktag type, Because the worker entered the location information last, Workday populates the *Region* worktag type with the value, Region 2.

Project and Project Plan Task Criteria

Workday populates default worktag values from reported projects or project plan tasks in this order:

Worktag Values Applied	Description	Examples
Project hierarchy	When users don't enter a worktag, Workday checks that on the View Project Hierarchy report, the Worktag Rule Configuration tab has 1 of these: • Use All Worktags from Project enabled. See Configure Project Cost and Revenue in Project Hierarchies.	You configure project hierarchy worktag rules with Use All Worktags From Project enabled. Project 1 is part of Project Hierarchy A. Project 1 has a *Location* worktag type with New York as the default value. When workers enter time for Project 1, Workday adds the *Location* worktag value from Project 1, New York, to the time entry.

Worktag Values Applied	Description	Examples

	• A derived worktag rule for the employee or contingent worker in the Worktag Rules for Time section. You can configure the rule to derive worktag default values from:
	  • The worker organization assignment.
	  • The related worktag values for the project.
	
	You can configure a single derived worktag rule to populate some worktag default values from worker organization assignments and some from their projects.
	
	See Set Up Worktag Rules for Project Cost and Revenue.
		Project 2 is in Project Hierarchy B. You configure Project Hierarchy B with a derived worktag rule that has revenue following the worker. In the derived worktag rule, you configure the *Cost Center* worktag to populate from the worker's organizational assignment. A worker's cost center organizational assignment is 1000 - Office of CEO. When the worker enters time for Project 2, Workday populates the *Cost Center* worktag with the value from the worker's organizational assignment, 1000 - Office of CEO.
		
		See Example: Configure Worktag Rules for Project Cost and Revenue.

Project	When the project hierarchy of the reported project doesn't have a derived worktag rule for a given worktag type, then Workday checks for related worktag values on the project. See Create Projects.	A worker enters time for a project that has a related worktag default value for *Cost Center* defined on the project. Workday populates the *Cost Center* default worktag value into the time entry.

When you transfer project transactions during an open period, Workday resets any worktag values that workers overrode on the related time blocks back to their default values.

See Transfer Project Transactions and Manage Project Billing Transactions.

Third-Party Scheduling Criteria

Workday populates default worktag values based on shifts imported from third-party schedules in this order:

Worktag Values Applied	Description	Examples
Imported attribute	Workday checks the attributes of third-party scheduling events and applies the attribute values to the corresponding worktags.	You configure the *Channel* worktag with the value of Direct in the time entry code. The third-party scheduling event has a *Channel* attribute with the value of Partner. Workday automatically populates the *Channel* worktag with the value

<table>
<tr><th>Worktag Values Applied</th><th>Description</th><th>Examples</th></tr>
<tr><td></td><td></td><td>of Partner when the worker checks in.</td></tr>
<tr><td>Closest scheduled shift</td><td>Workday checks the worker's closest scheduled shift start time within a 12-hour timeframe for worktag values.</td><td>The third-party scheduling event has a 9:00 AM check-in. The closest scheduled shift begins at 8:30 AM and has a Cost Center worktag with the value of IT. Workday populates the Cost Center worktag of the check-in event with the value of IT.</td></tr>
<tr><td>Imported time entry code</td><td>Workday checks the time entry code of the third-party scheduling event and applies the values specified there.</td><td>The third-party scheduling event has a 9:00 AM check-in and time entry code of Worked Time. The closest scheduled shift has no worktags. Worked Time has a Division worktag with the value of North. Workday populates the Dvision worktag of the check-in event with the value of North.</td></tr>
<tr><td>Default time entry code</td><td>Workday uses the default time entry code from the worker's time entry template and applies the values specified there.</td><td>The third-party scheduling event has a 9:00 AM check-in and no time entry code. The closest scheduled shift has no worktags. The time entry code on the worker's time entry template has a Store worktag with the value of 601. Workday populates the Store worktag of the check-in event with the value of 601.</td></tr>
<tr><td>Time entry template</td><td>When both the scheduled shift and the time entry code don’t specify values for a worktag, Workday evaluates the time entry template configuration.
<table>
<tr><th>Select Use Time Tracking Worktag Defaults</th><th>Worktag Values Applied</th></tr>
<tr><td>No</td><td>None</td></tr>
<tr><td>Yes</td><td>Workday evaluates the time entry template configuration and applies worktag values to</td></tr>
</table>
</td><td>See Set Up Third-Party Scheduling on page 2695.</td></tr>
</table>

<table>
<tr><th>Worktag Values Applied</th><th>Description</th><th>Examples</th></tr>
<tr><td></td><td><table><tr><td>Select Use Time Tracking Worktag Defaults</td><td>Worktag Values Applied</td></tr><tr><td></td><td>the check-in event according to the worktag precedence rules.</td></tr></table></td><td></td></tr>
</table>

Additional Considerations

Worktag default values only populate into a time entry when the worktag type is available on a worker's time entry template. Worktag default values populate even when you configure the worktag to be:

- Hidden on the time entry code.
- Hidden from self-service on the time entry template.

Workers don't see hidden values on their time entries, but Workday still displays the hidden values in the time block details.

Related Information
Tasks
Configure Project Cost and Revenue in Project Hierarchies
Set Up Worktag Rules for Project Cost and Revenue

Time Requests

Steps: Set Up Time Requests

Context

You can set up the Time Requests experience for users by specifying how they can access time requests, which time request codes they can use, and what happens when they submit their time requests.

You can configure Time Requests to enable:

- Workers to request in advance the number of hours they want to work.
- Managers and administrators to view details of multiple workers' time requests, request time on behalf of workers, bulk load time requests, and review and approve time requests.
- Time request validations to prevent submission of invalid time requests.

With Time Requests, users can:

- View time request details for historical and future dates when they select a date range of up to 3 months.
- Request time for a duration ranging from a day up to a month.
- Select from multiple time request codes that they're eligible for when they request time.

Steps

1. (Optional) Access the Create Business Process Definition (Default Definition) task.

   Create the definition for the *Time Request* business process if it doesn't exist in your tenant.

   Security: These domains in the System functional area:

   - *Business Process Administration*
   - *Manage: Business Process Definitions*
2. Edit Business Process Security Policies.

   Add these security groups to these *Time Request* business process actions:

Action	Security Groups
Request Time	Employee as Self Manager
Delete Time Request	Employee as Self Manager
Edit Time Request	Employee as Self Manager
Request Time for My Team	Manager
Approve	Employee as Self Manager
Cancel	Employee as Self Manager
Reassign Tasks	Manager
Deny	Employee as Self Manager

3. Edit Business Processes.

   Add an *Approval* step to the *Time Request* business process.
4. Edit Domain Security Policies.

   Configure security for these domains in the Time Tracking functional area:

   - *Self-Service: My Time Requests*
   - *Worker Data: My Team's Time Requests*
   - *Worker Data: Time Tracking: My Team's Time Worklet*
5. Set Up Worklets.
   a) Add Time Requests to the Time worklet.
   b) Add My Team's Time Requests to the Team Time worklet.
6. Create Time Request Codes on page 2719.

   Create 1 or more time request codes based on your organization's requirements.
7. (Optional) For users to bulk load time requests using the Put Time Requests EIB, configure security for the *Process: Import Time Requests* domain in the Time Tracking functional area.
8. (Optional) Enable mass time requests.
   a) Access the Edit Tenant Setup - HCM task.
   b) In the Time Tracking section, select the Enable Mass Time Requests check box.

Result

Time Requests is available for users as an option from either the Time or Team Time worklet, search, and the Time and Absence related actions menu. Managers can also view and approve time requests for their teams, and bulk load time requests using the Put Time Requests EIB.

Next Steps

For reporting on time requests, you can use report fields on different business objects, depending on your reporting requirements. See Concept: Time Requests on page 2723.

Related Information

Tasks

Create Time Entry Codes on page 2657

Steps: Set Up Worktags for Time Entry on page 2708

Examples

2025R2 Feature Release Note: Mass Time Requests

2025R1 Feature Release Note: Rename Request Overtime to Time Requests

Create Time Request Codes

Prerequisites

Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

Time request codes describe the types of time that workers can request, such as overtime. They display in the Time Request Code prompt when workers request time.

Time code groups control who can use a set of time request codes. Workers can use the time request codes in their time code groups.

Create 1 or more time request codes based on your organization's requirements. Example: You can create a time request code named Weekend Overtime, which workers can select when they request to work overtime on the weekend.

Steps

1. Access the Create Time Request Code task.

   As you complete the task, consider:

Option	Description
Entry Method	Select the time entry method where the time request code is available for workers. The available methods are: • *Hours Only* • *In/Out Only* • Both *Hours Only* and *In/Out Only*
Calculation Tags	Select the calculation tags that you use to track time. Note: You can select non-overtime tags (such as *Time in Lieu*), to enable workers to request a different type of time.

Option	Description
Increment For Hours Entry	Select the allowable increment when workers enter time. The available increments are: • *0.01 Hours* • *0.05 Hours* • *0.1 Hours* • *0.25 Hours* • *0.5 Hours* • *1 Hour* Available only if you select either of these entry methods: • *Hours Only* • Both *Hours Only* and *In/Out Only*
Rounding Option	Select a rounding option. If a rounding option exists, Workday rounds each In and Out time to the nearest rounding marker. The breakpoint determines whether the time rounds up or down for calculation purposes. Workday then calculates the duration between the rounded In and Out times to 6 decimal places. The available rounding options are: • *No Rounding* • *3 Minute Marker (1 minute breakpoint)* • *5 Minute Marker (2 minute breakpoint)* • *6 Minute Marker (2 minute breakpoint)* • *15 Minute Marker (7 minute breakpoint)* • *30 Minute Marker (15 minute breakpoint)* Available only if you select either of these entry methods: • *In/Out Only* • Both *Hours Only* and *In/Out Only*

2. (Optional) On the General tab, select from Workday-delivered or custom worktags. You can also select a default worktag value that workers enter with their time request. Project worktags aren't currently supported.
3. On the Groups tab, select 1 or more time code groups to associate with the time request code.

4. On the Validations tab, consider:
    a) The Enable time requests that cross the week breaker check box that allows workers to enter time requests which span across their defined work week.
    b) The Require Comment check box that requires workers to enter a value in the Comment field when they submit the time request.
    c) The Enable single in/out requests check box that restricts workers to only be able to submit a single request with start and end times. If you don't enable this option, workers can submit a single request with the same time frame for multiple days.
    d) Enabling any time request validations that you want to use. The Workday-delivered validation types prevent workers from submitting invalid time requests. For each validation type, you can set a severity level and customize the default error message.

If you don't configure a custom validation message, the default error message is displayed.

Validation Type	Description	Default Error Message

Allowed Days after Current Date	The number of days after the current date that workers are allowed to submit a time request.
	Examples:
	• When you enter *0*, workers can either enter a time request for:
	  • Today only.
	  • A date range that begins in the past and ends today.
	• Today is March 20. When you enter *2*, workers can request time that starts on March 23.
		Enter a time request that is within the allowable time range for future-dated requests.

Allowed Days before Current Date	The number of days prior to the current date that workers are allowed to submit a time request.
	Examples:
	• When you enter *0*, workers can either enter a time request for:
	  • Today only.
	  • A date range that begins today and extends into the future.
	• Today is March 23. When you enter *2*, workers can request time for any date before March 21.
		Enter a time request that is within the allowable time range for past requests.

Validation Type	Description	Default Error Message
Allowed Days of the Week	The days that workers are allowed to submit a time request. Example: When you select *Monday*, *Tuesday*, *Wednesday*, *Thursday*, and *Friday*, workers can't request time on Saturday or Sunday.	This time request code is not allowed on this day. Select a different code.
Consecutive Day Requests	The number of consecutive days that workers are allowed to request time. Example: When you enter *10*, workers can request 10 days at a time. Note: The validation: • Only checks the start and end dates of the request, and doesn't check against the number of hours in the request. • Doesn't check against other existing time requests. Example: A submitted request exists for March 1-5. An additional request is submitted for March 6-12. No validation message is displayed, and the worker can submit the time request.	Enter a time request that is within the allowed limit for consecutive days.
Maximum Daily Limit for Time Requests	The total number of hours for each day that workers request time. Applies to time request codes that allow hours only entry method. Examples: When you enter *3*, and workers submit a time request that is for: • 1 day, they can submit a maximum of 3 hours. • 3 days, they can submit a maximum of 9 hours over the 3 days. Example: They can request 4 hours on Day 1, 3 hours on Day 2, and 2 hours on Day 3.	Enter a number of hours that doesn't exceed the daily limit.

Validation Type	Description	Default Error Message
	Note: The validation only takes into consideration submitted and approved time requests.	
Number of Days Allowed for Deletion	The number of days before today that you allow workers to delete their time requests. The value you enter determines how far back they can delete historical time requests. Examples: When you enter: • *0*, workers can't delete any requests prior to today. • *30*, workers can delete time requests up to a month in the past.	You can't delete time requests in this time frame.
Required Advance Notice before Time Request	The number of days prior to the start date of the time request that workers must submit the request. Example: Today is March 20. When you enter *5*, workers can only request time that starts on or after March 26.	Submit a time request that is within the advance notice timeframe.

Result

- Workers who are eligible for the new time request code can select it when they request time.
- You can identify the time request code that's associated with the time request:
  - When you access either the My Team's Time Requests or Time Requests report.
  - When you view the details of the time block on the worker's time entry calendar.

Related Information

Reference

Reference: Increments and Rounding for Time Entry on page 2671

Examples

2025R1 Feature Release Note: Rename Request Overtime to Time Requests

Concept: Time Requests

Time requests enable workers to request to work time that requires preapproval. Managers and administrators can:

- Request that workers be available to work time in advance.
- Submit a single time request to cover multiple workers. Example: When an entire team will need to stay late to attend a workshop.
- Bulk load time requests into Workday using the Put Time Requests EIB.
- Set up time request validations to prevent users from submitting invalid time requests.
- Review and approve time requests for multiple workers.

When users access the Time Requests report, they can enter a date range that is less than or equal to 3 months, allowing them to view details of time requests for historical and future dates. They can access the report from the:

- Actions menu on the time entry calendar.
- Team Time worklet.
- Time worklet.
- Time and Absence related actions of their worker profile.

From the New Request option, users can request time from a day up to a month, and select from multiple time request codes for which they're eligible.

For hours only requests of a long duration, we display time requests on the time entry calendar:

- On the start date of the request, the end date of the request, and every 7 days in between, in a weekly calendar view.
- As 1 continuous band for the duration of the request in a monthly calendar view.

Note: Once the time request is approved, the worker must enter the actual time worked in order for Workday to calculate their hours and pass them to Payroll.

Example

At your company, workers who attend career-related seminars after their scheduled shift are eligible for overtime pay for the duration of the seminar. Jerry submits an overtime request for his manager to preapprove 2 hours of overtime for a seminar he wants to attend next Tuesday. Jerry's manager receives the request and checks what her team has already requested to ensure Jerry's request stays within the team's budget requirements. After reviewing, she approves the request.

Matching Time Requests to Time Blocks

Time requests are matched to time blocks based on time calculation tags. Workday matches the time calculation tags on the time request code to those on the time block. Worktag values don't impact how Workday matches time requests to time blocks.

In/out time requests can't overlap one another. Also, hours only time requests can't overlap one another. However, in/out time requests may overlap with hours only time requests. When matching time requests to time blocks, in/out time requests are evaluated first, then hours only time requests. Hours only time requests are matched if the calendar date of the time block falls within the start and end dates of the time request.

A time block can only be matched to 1 time request. In the event that a time block overlaps with more than 1 in/out time request, it is matched to the earliest request only. Example: A worker has a time block for 2025-01-13 from 5:00 PM - 9:00 PM with the Overtime calculation tag. A worker submits 2 time requests using the Weekday Overtime time request code that has the Overtime time calculation tag:

- Time Request 1 on 2025-01-13 from 5:00 PM - 7:00 PM.
- Time Request 2 on 2025-01-13 from 7:00 PM - 8:00 PM.

The time block is only matched to Time Request 1.

Reporting

You can use these standard reports to view time requests, request time, and approve time requests:

- My Team's Time Requests
- Review and Approve Time Requests
- Time Requests

Based on your reporting requirements, you can use report fields on these business objects to report on time requests:

Business Object	Considerations
Requested and Worked Time Pairing	You can report on the differences between time requests and time worked, and time requests that cross the week breaker. Time blocks that share a time calculation tag with a time request code, but aren't matched to a time request, are still pulled into reports on this business object.
Time Day	You can report on time requests that are 1 day or less in duration. Note: The All Time Requests for a Day report field doesn't return time requests that span multiple days.
Time Month	You can report on these details for time requests that occur during a specific calendar month: • Monthly time request pairings. • Requested time for a month. • Time requests for a month. • Worked hours against a time request for a month. • Worked time against a time request for a month.
Time Request Code	You can report on details of the time request.
Time Request Code Worktag Joiner	You can identify the worktag that's associated with the time request.
Time Request Event	You can identify the time request block for the time request event and view details of the time request event.
Time Week	You can report on daily or multi-day requests that are fully retained within the week, and time requests that cross the day breaker.

Workday-Created Time Code Groups

Time request codes (formerly overtime request codes) are no longer linked to a time entry template, but to 1 or more time code groups. When Workday:

- Finds a time entry template with an overtime request code that uses the same time tracking eligibility rule as a time code group, Workday moves the overtime request code to that time code group for you.
- Is unable to match the time tracking eligibility rule for the time entry template and time code group, Workday creates a new time code group with the overtime request code. Workday uses this naming convention for the time code groups: [Overtime Request Code name] for [Eligibility Rule Name] - Workday created. To find the new time code group, run the All Time Code Groups or View Time Code Group report. You can keep and rename the Workday-created time code group, or you can move the time request code to an existing time code group and delete the one that Workday created.

Related Information

Concepts

Concept: Put Time Requests EIB

Examples

2025R2 Feature Release Note: Mass Time Requests

2025R1 Feature Release Note: Rename Request Overtime to Time Requests

FAQ: Time Requests

Are workers paid based on time requests?

No. Time requests are different from reported time. Although time requests include time calculation tags, they aren't counted towards worked time. Workers need to enter time in line with the time they've requested in order to be paid.

Can I configure business process validations for time requests?

Workday doesn't recommend using business process validations for time requests. Business process validations can't be surfaced when the user enters a time request from the Time Requests or My Team’s Time Request reports. Business process validations that are triggered will show in My Tasks for the user.

Can users enter in/out requests for multiple days?

With this release, we support multiple day in/out requests. This allows users to easily create multiple time requests from one submission if they know they need to request the same time for multiple consecutive days.

For single day in/out requests, the Start Date needs to be the same as the End Date, even when crossing midnight.

These examples show the number of time requests created when a worker submits a single time request with the same Start and End Date and with different Start and End Dates:

Start Date	End Date	In Time	Out Time	Result
2025-03-17	2025-03-17	9:00 PM	2:00 AM	1 time request is created

Start Date	End Date	In Time	Out Time	Result
2025-03-17	2025-03-18	9:00 PM	2:00 AM	2 time requests are created

If you want to only allow users to submit a single request with start and end times, select the Enable single in/out requests check box on the time request code.

Can workers view their time requests on the time entry calendar?

Workers can view time requests on the classic calendar. If their time entry calendar is configured to show only the period calendar, they can view their time requests on the My Time Requests report. See Set Up Time Entry Calendars on page 2679.

How do I configure the Allowed Days after Current Date validation when time requests cross midnight?

The Allowed Days after Current Date validation is used to restrict the number of the days into the future for which the user can enter time requests. If you enter a value of *0*, users can only create time requests for today. Because time requests use calendar date, time requests that cross midnight are considered as next-day requests.

If you enter *0* for the Allowed Days after Current Date validation, and a worker enters a time request from 9:00 PM to 2:00 AM, the validation will fire. For this use case, set the value for the Allowed days after Current Date validation to *1*.

What's the purpose of the time calculation tag on a time request?

The time calculation tag on the time request is used to match the time request to the worked time when it is reported. You can track the variances in time requested and time reported for planning purposes. Once a time request is matched to a time block, the Calculated columns on the Time Requests and My Team’s Time Requests reports will display those details. You can also use the Requested and Worked Time Pairing business object to report on time requests and compare them to time worked.

Who can access the My Team’s Time Requests report?

The My Team’s Time Requests report is a manager report that allows managers to view the time requests for all of their direct reports. If another user needs to see the time requests, Workday recommends creating a custom report.

Why are there no data displayed in the Calculated columns on the Time Requests and My Team’s Time Requests reports?

The Calculated columns are blank because either:

- There isn’t a time block that matches the time request. View the Matching Time Requests to Time Blocks section in Concept: Time Requests on page 2723.

	• The time request isn't approved. Matching only occurs for time requests are in an Approved state.
Why are time requests not displayed in weekly totals?	Although time requests have time calculation tags, they aren't counted in weekly totals since time requests aren't the worker’s time that's passed to payroll.

Time Kiosk

Steps: Set Up Workday Time Kiosk

Context

Note: The solutions described in this section are not part of the Workday Service. See Legal Notice for details.

You can install the Workday Time Kiosk app on an iPad or Android tablet so that workers can check in and out on a common device. Time Tracking data flows from the tablet directly into Workday Time Tracking.

Workday Time Kiosk integration requires an integration system user (ISU) and integration system security group (ISSG).

Steps

1. Create Integration System User for Time Kiosk on page 2728.
2. Access the View Domain report.
    a) Select the *Process: Time Clock Event REST API’s* domain from the Domain prompt.
    b) Click OK.
    c) From the related actions menu of Domain Security Policy, select Domain Security Policy > Enable.

    Security: *Security Administration* domain in the System functional area.
3. Create Integration System Security Group for Time Kiosk on page 2729.
4. Set Up the Workday Time Kiosk App on page 2730.
5. (Optional) Access the Edit Tenant Setup - HCM task.

    When you want to display location next to position for multiposition workers, select *Location* from the Additional Info on Position Display prompt.

    Security: *Setup Administrator* domain in the System functional area.
6. (Optional) Steps: Set Up End of Shift Time Attestations on page 2806.

Next Steps

Managers and administrators can use the Maintain Invalid Time Clock Events for Workers task to correct or ignore invalid time clock events for the manager's direct reports.

Related Information

Examples

2025R1 Feature Release Note: Workday Time Kiosk

Workday Time Kiosk App

Create Integration System User for Time Kiosk

Prerequisites

Security: *Integration Security* domain in the Integration functional area.

Context

You can create an integration system user (ISU) for the Workday Time Kiosk, enabling you to assign the ISU to a security group with permissions to access the required integrations.

Steps

1. Access the Create Integration System User task.
2. Complete the task:

Option	Description
User Name	Enter *ISU_WD_Time_Clock*. If you enter a different name, your ISU won't configure properly.
New Password New Password Verify	Set a password. You won't need this password again.
Session Timeout Minutes	Keep the value at zero to prevent the integration system user session from expiring. Expired sessions can cause the integration to stop before it successfully completes.
Do Not Allow UI Sessions	Select the check box.

3. Click OK and Done.

Next Steps

Create an integration system security group for the Workday Time Kiosk.

Create Integration System Security Group for Time Kiosk

Prerequisites

- Create Integration System User for Time Kiosk on page 2728.
- Security: These domains in the System functional area:
  - *Security Activation*
  - *Security Configuration*

Context

You can create an integration system security group (ISSG) for the Workday Time Kiosk. You can then assign the integration system user (ISU) to the ISSG so that your ISU has permissions to access the required integrations.

Steps

1. Access the Create Security Group task.
2. Complete the task:

Option	Description
Type of Tenanted Security Group	Select *Integration System Security Group (Unconstrained)*.
Name	We recommend that you choose a name that identifies or references the app. Example: Time Kiosk Security Group.

3. Click OK.
4. From the Integration System Users prompt, select *ISU_WD_Time_Clock*.
5. Click OK.
6. From the related actions menu of the new ISSG, select Security Group > Maintain Domain Permission for Security Group.
7. Complete the task:

Option	Description
Domain Security Policies permitting Modify access	Select *Process: Time Clock Event REST API's*.
Domain Security Policies permitting View access	Select: • *Worker Data: All Positions* • *Worker Data: Current Staffing Information* • *Worker Data: Public Worker Reports* • *Worker Data: Time Calendar* • *Worker Data: Time Tracking*
Domain Security Policies permitting Put access	Select *Process: Time Clock Integration*.

8. Click OK.
9. Ensure Workday displays the *Process: Time Clock Event REST API's* domain in the Report/Task Permissions section with Modify access.
10. Click Done.
11. (Optional) Edit Domain Security Policies.

    You can configure the security policy when Workday doesn't display the domain with Modify access.

    a) From the Functional Area prompt, select *Time Tracking*.
    b) Select the *Process: Time Clock Event REST API's* domain.
    c) Click Edit Permissions.
    d) Enable Modify access for the ISSG.
12. Activate Pending Security Policy Changes.

Result

Workday assigns the SU_WD_Time_Clock ISU to the new ISSG.

Next Steps

Set up the Workday Time Kiosk app.

Related Information

Tasks

Create Integration System Security Groups

Set Up the Workday Time Kiosk App

Prerequisites

- Download 1 of these:
    - Workday Time Kiosk app from the App Store onto your iPad. This app isn't searchable by name and is accessible only through the direct link.
    - Workday Time Kiosk app from Google Play onto your Android tablet.
- Security: *Security Administration* domain in the System functional area.

Context

You can set up the Workday Time Kiosk app on an iPad or Android tablet and register it as an API client so that recorded time flows to Workday Time Tracking.

Steps

1. On the tablet, launch the app, and select Get Started.
2. Select Copy Certificate.

   The certificate is not confidential.
3. Share the certificate so that you can access it from Workday. Example: Send it in an email.
4. In Workday, access the Register API Client task.
5. Complete the task:

Option	Description
Client Name	We recommend that you enter a name that's specific to the tablet you're setting up.
Client Grant Type	Select *Jwt Bearer Grant*.
x509 Certificate	Select *Create x509 Public Key*. We recommend that you enter a name that's specific to the tablet you're setting up. In the Certificate field, paste the certificate that you copied in the app and shared.
Integration System User	Enter *ISU_WD_Time_Clock*.
Access Token Type	Select *Bearer*.
Scope (Functional Areas)	Select: • *Time Tracking* • *Staffing*

6. Click OK.
7. From the Client ID field, copy the ID.
8. Share the ID so that you can access it from the Time Kiosk app. Example: Send it in an email.
9. Click Done.
10. On the tablet, access the Workday Time Kiosk app.

    If the Workday Time Kiosk app is closed, relaunch the app and select I've Already Done This when it asks you to copy the certificate.

    a) As you enter your organization information, consider that the Organization ID is your tenant name and the Web Address is the URL for your tenant.
    b) Enter the client ID that you copied on the Register API Client task.
    c) Select *Submit Client ID*.
11. (Optional) Configure worktags that you want to associate with all time tracking events entered on the Time Kiosk app.

    The app supports these worktags:

    - *Cost Center*
    - *Location*

    If you don't configure these worktags on the tablet, the worktags will populate with the values associated with the time type the worker selects. The time type can be a time entry code, project, or project plan task. The worktag values you configure on the Time Kiosk take precedence over worktag values that populate from the time type.

a) Access 1 of these reports in Workday:
    - View Cost Center
    - View Location
b) Select the cost center or location.
c) Click OK.
d) From the related actions menu of the cost center or location, select Integration IDs > View IDs.
e) Copy the Workday ID.
f) Share the ID so that you can access it from the Time Kiosk app. Example: Send it in an email.
g) On the tablet, enter the Workday ID in the relevant field, Cost Center or Location.

Change Time Kiosk Settings

Prerequisites

Set up the Workday Time Kiosk app.

Context

On the tablet, you can update Workday Time Kiosk settings, such as:

- Employee ID type.
- Language.
- Time zone.
- *Location* and *Cost Center* worktag values.

Steps

1. Sign in to the Workday Time Kiosk.
2. Access the Settings page.

   Use your organization ID name as the password.
3. Update the settings.

   To use alphanumeric employee IDs, toggle off Numeric Employee ID.

Concept: Time Kiosk

Time Tracking customers can set up the Workday Time Kiosk so that workers can check in and out at a central location without needing to use a personal mobile device. This simplifies time recording when:

- You want a backup time recording method.
- Your workers don't all own mobile devices.
- Your workers don't have the Workday app.

To set up the Time Kiosk, you must install the Workday Time Kiosk app on a tablet that:

- Has an internet connection.
- Runs a supported version of iOS or Android. See Concept: Mobile Devices and Features.

The Workday Time Kiosk works even when offline so that workers can record their time during local network or Workday scheduled downtime. Data stored on the kiosk when it's offline is automatically transmitted to your tenant when you reconnect the app to the internet. The Time Kiosk will store locally encrypted employee data on the tablet for 30 days. To check in during downtime or when the Time Kiosk is offline, a worker must have checked into the device within the previous 30 days while the device was online. Reconnect the app to the internet as frequently as possible to ensure data stored during offline mode is transmitted to your tenant and to limit potential loss of the data.

Workers enter their employee IDs to check in and out on the app. Check-ins and check-outs flow to Workday as time clock events. The Time Kiosk supports both numeric and alphanumeric IDs. It doesn't support facial recognition, biometrics, or RFID.

The Workday Time Kiosk supports these languages:

- English (United States).
- Chinese (Simplified).
- Chinese (Traditional).
- Dutch.
- French (Canada).
- French (France).
- German.
- Italian.
- Japanese.
- Korean.
- Portuguese (Brazil).
- Spanish.

The Workday Time Kiosk also supports:

- Check in.
- Check out.
- Check out for break.
- Check out for meal.
- Early check-in restrictions.
- Multiposition workers.
- Time attestations.
- Time entry template default values for:
    - Time entry codes.
    - Worktags.

Related Information

Examples

2025R1 Feature Release Note: Workday Time Kiosk

2025R2 Feature Release Note: Time Attestations on the Workday Time Kiosk

FAQ: Time Kiosk

Can employees download the Kiosk to their own devices? What about mobile phones?	We designed the Time Kiosk app to be used on tablets that run iOS or Android. We don't recommend using the application on personal devices.
Can the Time Kiosk support a third-party badge reader?	Some customers use badge scanners. See Workday Community: Barcode Scanner for Workday Time Kiosk
Does the Time Kiosk support facial recognition?	Workers log in using only their employee IDs. Clock partners can support facial recognition on their devices.
Is the Time Kiosk a separate app from the Workday app?	Yes, the Workday Time Kiosk app is a separate app from the Workday Mobile app. The standard Workday Mobile app is for end users and is available for anyone to download . The Time Kiosk

	app is only available to Time Tracking customers through a download link.
Is the worker PIN used to capture time on the Kiosk stored on the worker profile in Workday?	Workers use their Workday employee ID to log in and capture time.
Is there an add-on cost to use the Time Kiosk?	The Workday Time Kiosk is included with Workday Time Tracking at no additional cost.

Time Calculations

Steps: Set Up Calculations for Time Tracking

Context

Create calculations for overtime, premiums, and other pay policies to execute when workers enter time.

Steps

1. Create Time Calculation Tags on page 2735.

   Map the tags to payroll earnings to identify how to pay for time.
2. Create time calculations.

   See:

   - Create Accumulated Overtime Calculations.
   - Create Consecutive Day Calculations on page 2736.
   - Create Flextime Calculations.
   - Create Minimum Daily Hours Calculations on page 2739.
   - Create Minimum Rest Calculations on page 2740.
   - Create Minimum Weekly Hours Calculations on page 2742.
   - Create Override Rate Calculations on page 2744.
   - Create Predictive Scheduling Calculations.
   - Create Schedule Deviation Calculations on page 2745.
   - Create Shift Differential Calculations on page 2746.
   - Create Standard Overtime Calculations on page 2748.
   - Create Time Block Conditional Calculations on page 2751.
   - Set Up Time Block Create Calculations on page 2754.
   - Create Time Calculations for Statutory Holidays (CAN) on page 2757.
3. Assign Time Calculation Priorities on page 2758.
4. Create Time Calculation Groups on page 2760.

   Assign time calculations to time calculation groups.
5. Create Work Schedule Calendars.

   For biweekly calculations, specify a biweekly calculation start date on the work schedule calendars to which the calculations apply. The biweekly calculation start date determines the biweekly periods for biweekly time calculations.
6. (Optional) Configure working time or overtime restrictions based on your company or country policies.

   See Steps: Set Up the Time Accumulator Framework on page 2767.

Next Steps

- (Optional) Validate your changes by using the View Worker's Time Eligibility report.

- (Optional) Use the Time Calculation Debugger report to troubleshoot a worker's time calculations over a period.

Related Information

Concepts

Concept: Time Calculation Debugger on page 2802
Steps: Set Up Payroll to Pay Time on page 2831
The Next Level: Time Tracking Configuration
The Next Level: Time Tracking - Calculated Fields for Time Calculations and Time Entry Validations
2024R1 What's New Post: Effective Date Support in Time Tracking

Create Time Calculation Tags

Prerequisites

Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

Time calculation tags identify time blocks and separate reported time into different types of calculated time. Example: Regular, overtime, and double time.

Create time calculation tags that you can use to:

- Perform calculations on time blocks.
- Map to Payroll earnings to identify how to pay time.
- Display time and time off totals on the time entry calendar.
- Include calculated time blocks in time off accrual calculations to accommodate compensatory time off instead of overtime.

You can also assign calculation tags to time offs set up in Workday Absence Management so that Workday can tag time off for use in calculations. However, calculation tags only apply to time off while calculations are actually running. Workday doesn't store calculation tags on the time off once calculation processing is complete.

Steps

1. Access the Maintain Time Calculation Tags task.
2. As you complete the task, consider:

Option	Description
Name	Visible to workers on the time entry calendar unless you hide it. Examples: *Regular*, *Overtime*, *Sunday*, *Holiday*.

Temporary	Select if you don't want to store tags with calculated time. Typically, you store tags only when you:
	• Map tags to earnings in Workday Payroll.
	• Use tags in:
	    • Absence Management.
	    • Third-party applications.
	    • Time accumulators.
	Example: You need a *Sunday* tag to identify time blocks for overtime calculations but don't

Option	Description
	need to store the *Sunday* tag with calculated time blocks.
Hide from Calendar View	Prevents the tag from appearing when viewing time block details through the time entry calendar. Consider hiding tags that don't make sense to most users like tags used only for totals or payroll. The tag is always visible when adjusting time blocks.
Usage	Click to view details of tag usage.

Result

The time calculation tags are available for use when you create:

- Time entry codes.
- Time calculations.
- Earnings.
- Time offs.
- Accruals.

Next Steps

- If necessary, use the Delete Time Calculation Tag task to delete tags. You can't delete tags that you use in calculated time blocks or tags that map to time entry codes or accruals.
- Give users access to the View Time Calculation Tags report when you want them to be able to review, but not modify, time calculation tag usage and visibility.

Related Information

Concepts

Concept: Time Calculation Tags on page 2798

Concept: Time Calculations on page 2794

Concept: Time Tracking and Absence Management on page 2834

Steps: Set Up Payroll to Pay Time on page 2831

Tasks

Steps: Set Up Time Offs on page 2278

Create Consecutive Day Calculations

Prerequisites

- Create Time Calculation Tags on page 2735.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

Create calculations based on consecutive days of work. Example: You can set up a calculation to pay workers overtime for all hours worked on or after the sixth consecutive day of work.

Steps

1. Access the Create Time Calculation task.
2. For Calculation Type, select *Consecutive Day Calculation*.

3. As you complete the Criteria section, consider:

Option	Description
Allow Rolling Consecutive Day	Enables Workday to calculate consecutive days worked across work schedule calendar weeks. When you select this option, workers who begin work in the middle of their work schedule week are eligible for consecutive day calculations. Example: Abbie has a work schedule calendar that begins Monday 4/16, but she works 7 consecutive days starting Wednesday 4/18 through Tuesday 4/24. If you select this option, Abbie's time on Tuesday 4/24 is tagged with the seventh consecutive day calculation tag, even though she worked across 2 work schedule calendar weeks.
Reset After Consecutive Day Found	Select to enable Workday to reset the consecutive day counter, rather than tagging each subsequent worked day with the consecutive day calculation tag. Example: After 7 consecutive days, the count of consecutive days returns to 1, so time calculation tags don't apply on the eighth through 13th consecutive days. On the 14th consecutive day, Workday again applies the consecutive day calculation tag.
Consecutive Day Number (up to 9)	Enter the number of the consecutive day on which to begin the calculation.

4. Select 1 or more calculation tags that identify the time blocks that are subject to the calculation.
   - If you select more than 1 tag in a row, time blocks must include all tags in that row in this calculation.
   - If you select tags in separate rows, time blocks must include all tags specified in at least 1 row in this calculation.
5. In the Results section, select the time calculation tags to add to or remove from the calculated time blocks.

   If you don't select Reset After Consecutive Day Found, Workday adds or removes the time calculation tags for each subsequent workday after the consecutive day calculation initially triggers. Example: If your calculation includes the Regular tag, but removes it after applying the Overtime tag, the subsequent days also remove the Regular time calculation tag. If you rerun time calculations, Workday won't recognize those blocks as Regular time, but will treat them as Overtime.

   If you selected Allow Rolling Consecutive Day, and a worker's consecutive days fall within more than 1 week, running calculations on the first week might remove the calculation tags that Workday uses to detect consecutive days. When the worker later enters time in the next week, the calculation won't include the untagged consecutive days from the first week in the total. Prevent this with 1 of these configurations:

   - Add the overtime tag that's in the Add Tags field to the Include Calculation Tags grid.
   - In the Remove Tags field, don't select the time calculation tags you added to the Include Calculation Tags grid.

   Example: If your calculation includes the Regular tag, you must either also include the Overtime tag or, in the Results section, add the Overtime tag and don't remove the Regular tag.

6. In the Time Day Based On field, consider:

Option	Description
Calculated Date	Select to tag calculated time blocks according to the day breaker option.
Shift Date	Select to tag calculated time blocks with the shift date according to the Group Time Blocks for Shift Based on option on the time entry template.

7. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Example

Workers receive overtime for all hours worked on or after the sixth consecutive day. To define a consecutive day calculation that applies this rule:

1. Specify the Criteria.

Field	Value
Allow Rolling Consecutive Day	Selected.
Reset After Consecutive Day Found	Selected.
Consecutive Day Number (up to 9)	*6*
Time Calculation Tags	*Regular*

2. Define the Results.

Field	Value
Add Tags	*Overtime*
Remove Tags	*Regular*

Next Steps

Assign time calculation priorities.

Related Information
Concepts
Concept: Time Calculations on page 2794
Concept: Effective Dating for Time Calculations on page 2796
Examples
Example: Calculate Double Time on Seventh Consecutive Day on page 2778

Create Flextime Calculations

Prerequisites

- Create Time Calculation Tags on page 2735.
- Configure flextime bands on work schedule calendars. See Concept: Flextime Bands on page 2799.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

In a workplace with both mandatory and flexible hours, tag hours to track when employees are working.

Steps

1. Access the Create Time Calculation task.
2. For Calculation Type, select *Flextime Calculation*.
3. In the Include Calculation Tags section, add time calculation tags to apply to the hours in flextime bands.
4. In the Results section, add a row for each flextime band category you configured in the work schedule calendar, and select calculation tags to add or remove.

   Workday tags all flextime bands in a category with the same calculation tags.
5. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Next Steps

Assign time calculation priorities.

Related Information

Concepts

Concept: Effective Dating for Time Calculations on page 2796

Concept: Time Calculations on page 2794

2022R2 What's New Post: Flexible Time Bands for Time Calculations

Tasks

Create Work Schedule Calendars

Create Minimum Daily Hours Calculations

Prerequisites

- Create Time Calculation Tags on page 2735.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

Create minimum daily hours calculations when workers who enter time are guaranteed a minimum number of hours in a day. When a worker enters less than the minimum number of hours, the calculation creates a new calculated time block that makes up the difference.

Steps

1. Access the Create Time Calculation task.
2. From the Calculation Type prompt, select *Minimum Daily Hours Calculation*.
3. In the Criteria section, enter the minimum number of hours per day as a fixed value, or select a calculated field to use as the minimum.

   When using a calculated field, select from any numeric field on the Worker or Time Day business object.
4. Select 1 or more calculation tags that identify the time blocks that are subject to the calculation.

   - When you select more than 1 tag in a row, time blocks must have all tags in that row to be included in this calculation.
   - When you select tags in separate rows, time blocks must have all tags specified in at least 1 row to be included in this calculation.

   The calculation only applies when at least one matching time block exists for the day.

5. In the Results section, select additional time calculation tags to add to the calculated time blocks.

   By default, Workday always copies calculation tags from the existing time block to the new calculated time block, unless you remove them.
6. In the Time Day Based On field select:
   - Calculated Date to tag calculated time blocks according to the day breaker option.
   - Shift Date to tag calculated time blocks with the shift date according to the Group Time Blocks for Shift Based on option on the time entry template.
7. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Result

Workday copies worktags from existing time blocks to the new calculated time blocks that are generated by minimum daily hours calculations.

Example

Workers who are called in to work are guaranteed a minimum of 4 hours of pay for the day. To define a minimum hours calculation that applies this rule:

1. Create a time entry code that workers use to report the time they're called out. Assign it a default calculation tag of *Call Out*.
2. Access the Create Time Calculation task.
3. From the Calculation Type prompt, select *Minimum Daily Hours Calculation*.
4. Specify the Criteria:

Field	Value
Minimum Hours	*4*
Time Calculation Tags	*Call Out*

5. In the Results section, from the Add Tags prompt, select *Call Out Guaranteed*.

Aaron is called in to work on his day off and he enters 3 hours of *Call Out* time. To meet the 4-hour minimum requirement, Workday generates 2 calculated time blocks*:*

- A 3-hour time block tagged *Call Out*.
- A 1-hour time block, tagged *Call Out Guaranteed*, to make up the difference.

Next Steps

Assign time calculation priorities.

Related Information

Concepts

Concept: Effective Dating for Time Calculations on page 2796
Concept: Time Calculations on page 2794

Create Minimum Rest Calculations

Prerequisites

- Create predictive scheduling configurations.
- Create a time calculation tag to use in minimum rest calculations.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

A minimum rest calculation tags time blocks worked during a specified rest period. You can use minimum rest calculations to handle laws that require you to pay a premium if workers lack sufficient rest time between their shifts.

Minimum rest calculations don't account for time off blocks. Example: A worker is scheduled for a 12:00-8:00 PM shift. They work from 12:00-5:00 PM but then take 5:00-8:00 PM as sick time. The minimum rest calculation starts counting hours after the worker's 5:00 PM check-out.

Steps

1. Access the Create Time Calculation task.
2. For Calculation Type, select *Minimum Rest Calculation*.
3. As you complete the Criteria section, consider:

Option	Description
Predictive Scheduling Configuration	Select an existing predictive scheduling configuration or create a new one. After you select a configuration, Workday displays the Allowed Out Types and Minimum Rest Hours After Last Out fields. Workday generates these fields from the predictive scheduling configuration, and you can only edit them on the Edit Predictive Scheduling Configuration task.
Minimum Rest Grace Period after Last Out	Define a grace period that begins after a worker's out. During the grace period, Workday won't apply the minimum rest time calculation tag to time blocks. You can use the grace period to ensure that workers who check out for a short break don't qualify for the minimum rest premium. Example: You set a grace period of 2 hours. A worker checks out of work for a 1-hour break using the Out type you defined on the predictive scheduling configuration. After the break, the worker checks back in. Workday doesn't tag these time blocks with the minimum rest calculation tag because the worker's 1-hour break was within the 2-hour grace period.

4. In the Results section, select the time calculation tags to add to or remove from the eligible time blocks.
5. In the Advanced section, in the Do Not Modify field, select time calculation tags that you don't want Workday to modify.
6. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Example

Workers must take a 1 hour meal break. To tag time worked during meal breaks.

1. Specify the Minimum Rest Period Settings

Field	Value
Allowed Out Types	*Meal*
Minimum Rest Hours after Last Out (up to 48)	*1*

2. Define the Results.

Field	Value
Add Tags	*Missed Meal*

When a worker checks out at 11:00 with a reason of meal and checks back in at 11:30, Workday tags 11:30 to 12:00 with the *Missed Meal* tag. You can then report on the missed meal time or use the tag in time calculations to properly compensate the worker.

Next Steps

Assign time calculation priorities.

Related Information
Concepts
Concept: Effective Dating for Time Calculations on page 2796
Concept: Time Calculations on page 2794
Example: Calculate Minimum Rest Time on page 2783

Create Minimum Weekly Hours Calculations

Prerequisites

- Create Time Calculation Tags on page 2735.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

Create minimum weekly hours calculations when you need the total number of hours in a week to add up to a certain number. When a worker enters less than the minimum number of hours, the calculation creates a new calculated time block that makes up the difference.

Steps

1. Access the Create Time Calculation task.
2. From the Calculation Type prompt, select *Minimum Weekly Hours Calculation*.
3. In the Criteria section, enter the minimum number of hours per week as a fixed value, or select a calculated field to use as the minimum.

   When using a calculated field, select from any numeric field on the Worker or Time Week business object.
4. Select 1 or more calculation tags that identify the time blocks that are subject to the calculation.
   - When you select more than 1 tag in a row, time blocks must have all tags in that row to be included in this calculation.
   - When you select tags in separate rows, time blocks must have all tags specified in at least 1 row to be included in this calculation.

5. In the Results section, select time calculation tags to add to the calculated time blocks.

   Workday doesn't copy calculation tags from the existing time blocks to the new calculated time block.
6. In the Time Day Based On field select:
   - Calculated Date to tag calculated time blocks according to the day breaker option.
   - Shift Date to tag calculated time blocks with the shift date according to the Group Time Blocks for Shift Based on option on the time entry template.
7. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Result

Workday displays calculated time blocks generated from the minimum weekly hours calculation on the time entry calendar. These hours display on the last day of the week even if the worker's job terminates midweek.

Workday doesn't copy worktags from existing time blocks to the new calculated time blocks that are generated by minimum weekly hours calculations.

Example

Salaried employees in your company who are located in California must report all hours worked. For these employees, payroll must be able to subtract any hours fewer than 40 in a week from the employee's salary using an unpaid earning. To define a minimum hours calculation that applies this rule:

1. Create an eligibility rule for salaried employees located in California. Call it *Salaried Time Reporters - California*.

   See Create Worker Eligibility Rules for Time Tracking on page 2826.
2. Create a time code group with a worker eligibility of *Salaried Time Reporters - California*. Call it *Salaried Group - California*.
3. Create a time entry code and call it *Hours Worked - Salaried*. Assign the time code group *Salaried Group - California*.
4. Access the Create Time Calculation task.
5. From the Calculation Type prompt, select *Minimum Weekly Hours Calculation*.
6. Specify the Criteria:

Field	Value
Minimum Hours	*40*
Time Calculation Tags	*Regular*

7. In the Results section, from the Add Tags prompt, select *Unpaid*.
8. In the Groups tab, create a time calculation group with a worker eligibility of *Salaried Employees - California*.

Jared is a salaried employee located in California. On Monday, he enters 8 hours using the *Hours Worked - Salaried* time entry code. On Saturday, the last day of the week, Workday displays 32 autogenerated hours on Jared's time entry calendar. Workday tags these hours as unpaid time. Each day Jared reports 8 more hours of worked time, and the total unpaid time decreases by 8 hours.

Next Steps

Assign time calculation priorities.

Related Information

Concepts

Concept: Effective Dating for Time Calculations on page 2796

Concept: Time Calculations on page 2794

Create Override Rate Calculations

Prerequisites

- Create Time Calculation Tags on page 2735.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

Create calculations to assign override rates to workers' time blocks based on the details of the work they're doing. Example: You might pay workers a different rate when they work for a particular cost center. You can define multiple override rates in 1 calculation, assigning a rate to each combination of worktag values.

Note: If you manually enter an override rate on a time block, that rate also overrides any override rate calculations that apply to the time block.

Steps

1. Access the Create Time Calculation task.
2. From the Calculation Type prompt, select *Override Rate Calculation*.
3. Select 1 or more Worktags.

   The worktags you select determine the worktag detail combinations to which you can assign override rates.
4. (Optional) Select a Start Date and End Date to define a time period for the calculation to be in effect.

   The calculation is in effect for the time blocks reported for the time period. The time block date can be different from the date the time block is actually reported. Example: If the calculation is in effect starting on 2014-01-01, Workday includes a time block reported on 2013-12-31 for 2014-01-01 in the calculation but doesn't include a time block reported on 2014-01-01 for 2013-12-31.
5. (Optional) Select Time Calculation Tags to further identify the time blocks to which you want to apply the override rates.
6. Add a row in the Rate Assignments table for each rate assignment that you want to define.
   a) Select a worktag value for each worktag.
   b) Enter an Override Rate for the worktag value or combination of worktag values.
   c) (Optional) Select a Currency for the override rate.

      When you don't specify a currency, Workday Payroll uses the worker's default currency when referencing the override rate.
7. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Result

When workers enter time blocks that match the worktag type and time calculation tag conditions that you specified, Workday applies the appropriate override rate to the time blocks.

Next Steps

Assign time calculation priorities.

Related Information

Concepts

Concept: Effective Dating for Time Calculations on page 2796

Concept: Time Calculations on page 2794

Create Predictive Scheduling Calculations

Prerequisites

- Create Time Calculation Groups on page 2760.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

You can create 1 predictive scheduling calculation for your tenant. Workday uses the calculation to create penalty time blocks for workers when their schedule is changed without sufficient notice.

To use Predictive Scheduling, you need both the Time Tracking and Workday Scheduling products.

Steps

1. Access the Create Time Calculation task.
2. From the Calculation Type prompt, select *Predictive Scheduling Calculation*.
3. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Next Steps

Configure criteria for the calculation using the Create Predictive Scheduling Rule Sets task.

Related Information

Concepts

Concept: Effective Dating for Time Calculations on page 2796

Concept: Time Calculations on page 2794

Examples

Example: Calculate Minimum Rest Time on page 2783

Create Schedule Deviation Calculations

Prerequisites

- Create Time Calculation Tags on page 2735.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

Create schedule deviation calculations to tag time blocks a worker enters outside their schedule. You can use schedule deviation calculations to pay workers a premium for hours worked outside their scheduled shifts.

Steps

1. Access the Create Time Calculation task.
2. For Calculation Type, select *Schedule Deviation Calculation*.

3. (Optional) Select Use Workday Scheduling Data to enable Workday to pull a worker's scheduled hours from the Workday Scheduling SKU rather than work schedule calendars from Time Tracking. You must have the Workday Scheduling SKU enabled for this to take effect.
4. Select 1 or more calculation tags that identify the time blocks that are subject to this calculation. Example: If you include the Regular calculation tag, the calculation will tag Regular time worked outside the worker's schedule.
    - If you select more than 1 tag in a row, the time blocks must have the all tags in that row.
    - If you select tags in separate rows, the time blocks must have all the specified tags in at least 1 of the rows.
5. In the Results section, add the time calculation tags to add or remove from time blocks that are outside of the worker's schedule.

    You can tag hours differently based on when the time was worked outside of the schedule. Add time calculation tags to at least 1 of these sections:

    - Before First Scheduled In
    - Between Scheduled Shifts
    - After Last Scheduled Out
    - Unscheduled Days

    If you want to treat all time worked outside of the work schedule in the same way, select the same tags to add and remove in each section. By default, all calculation tags from the existing time blocks copy to calculated time blocks generated by this calculation unless you remove them.
6. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Next Steps

Assign time calculation priorities.

Related Information
Concepts
Concept: Effective Dating for Time Calculations on page 2796
Concept: Time Calculations on page 2794
2021R2 What's New Post: Schedule Deviation Calculation

Create Shift Differential Calculations

Prerequisites

- Create Time Calculation Tags on page 2735.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

A shift differential calculation tags time blocks between certain hours so that you can pay in/out workers a shift differential. Example: You can tag hours during the midnight shift so that employees receive a premium for the hours worked.

Note: Time Tracking applies shift differentials based on actual times worked. Compensation plans can also apply shift differential premiums for all of a worker's hours regardless of the actual work times entered in Time Tracking. Before using this calculation, make sure that compensation plans don't already handle shift differentials.

Steps

1. Access the Create Time Calculation task.

2. From the Calculation Type prompt, select *Shift Differential Calculation*.
3. In the Criteria section, enter the Start Time and End Time.

   Workday tags time worked between the start and end time with the calculation tags.
4. Select 1 or more calculation tags that identify the time blocks that are subject to the calculation.
   - When you select more than 1 tag in a row, time blocks must have all tags in that row to be included in this calculation.
   - When you select tags in separate rows, time blocks must have all tags specified in at least 1 row to be included in this calculation.
5. In the Results section, select the time calculation tags to add to or remove from the calculated time blocks.
6. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Result

Workday splits reported time blocks that span the start or stop time.

Example

Employees receive a shift differential for all hours worked between 4:00 PM and 2:00 AM. To define a shift differential calculation that applies this rule:

1. Specify the Criteria:

Field	Value
Start Time	*4:00 PM*
End Time	*2:00 AM*

2. Define the Results:

Field	Value
Add Tags	*Shift 1*
Remove Tags	Leave empty

When a worker then enters time from 2:00 PM to 7:00 PM, Workday creates 2 time blocks:

- 2:00 PM to 4:00 PM (not tagged with the *Shift 1*).
- 4:00 PM to 7:00 PM (tagged with *Shift 1*).

Next Steps

Assign time calculation priorities.

Related Information
Concepts
Concept: Effective Dating for Time Calculations on page 2796
Concept: Time Calculations on page 2794
Examples
Example: Calculate the Majority of a Shift on page 2788

Create Standard Overtime Calculations

Prerequisites

- Create Time Calculation Tags on page 2735.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

Create standard overtime calculations to pay workers overtime after they work a certain number of hours during a specified period of time, such as a day or a week. When reported hours exceed the threshold you set, Workday creates a separate calculated time block for the overtime.

Steps

1. Access the Create Time Calculation task.
2. For Calculation Type, select *Standard Overtime Calculation*.
3. Define the threshold for overtime.

Option	Description
Period	Select 1 time period over which to calculate overtime: • *Biweekly*. • *Configurable Period*. Select to use a configurable time period. Example: Fiscal, rather than calendar, months. You can configure this value on work schedule calendars • *Daily*. • *Rolling 24 hours*. See Concept: Rolling 24-Hour Periods. • *Shift*. • *Weekly*.
Replace Hours Greater than (value)	Enter the threshold as a fixed value. Workday calculates any reported hours greater than this value as overtime.
Replace Hours Greater than (calculated field)	Select a calculated field to use as a threshold. Workday calculates as overtime any reported hours greater than the value returned by the calculated field. Valid calculated fields include any numeric calculated fields on these business objects: • *Worker*. • *Time Week*. • *Time Day* or *Time Shift*. This field isn't available for calculations based on biweekly periods.

4. Select 1 or more calculation tags that identify the time blocks that are subject to the calculation.
    - If you select more than 1 tag in a row, time blocks must have all tags in that row to include in this calculation.
    - If you select tags in separate rows, time blocks must have all tags specified in at least 1 row to be included in this calculation.

    To refine the selection criteria, use the Advanced options.
5. In the Results section, select the time calculation tags to add to or remove from the calculated time blocks that exceed the threshold.

    By default, all calculation tags from the existing time blocks copy to calculated time blocks generated by this calculation unless you remove them.
6. In the Time Day Based On field select one of these options:

Option	Description
Calculated Date	Tags calculated time blocks according to the day breaker.
Shift Date	Tags calculated time blocks with the shift date according to the Group Time Blocks for Shift Based on option on the time entry template.

7. (Optional) In the Advanced section, define additional options.

    These options give you greater control over how Workday selects time blocks and applies the results.

Option	Description
Include Scheduled Hours	Select to sum a worker's scheduled and reported hours to see if the worker exceeds the overtime threshold (the number in the Replace Hours Greater than field). Example: The weekly threshold is 40 hours. John has 35 scheduled hours, and enters 6 hours. Workday determines that John has 1 hour of overtime. This option is useful for workers who enter exceptions only. It requires that workers have a work schedule assigned.
Use Workday Scheduling Data	Select to enable Workday to determine a worker's scheduled hours from the Workday Scheduling SKU rather than work schedule calendars from Time Tracking. You must have the Workday Scheduling SKU enabled for this to take effect. This option is only available when you select the Include Scheduled Hours option.
Tag Time With Worktags First	Select to give a higher priority to time blocks with worktags when Workday adds and removes calculation tags. Example: Your company pays workers overtime when they work more than 8 hours in a day. On Monday, a worker has a 2-hour time block with a *Cost Center* worktag and an 8-hour time block with no worktags. Charge daily

Option	Description
	overtime to the cost center in the time block that has a worktag. If you don't select this option, Workday begins to add and remove time calculation tags as soon as the threshold is met.
Do Not Modify	Select calculation tags that Workday shouldn't modify. When Workday adds and removes calculation tags, it will give a lower priority to time blocks that have the calculation tags you select here. Example: The weekly overtime threshold is 40. Time blocks with the holiday calculation tag or regular calculation tag are subject to the overtime calculation. Do Not Modify is set to Holiday. James has 35 hours of regular time and 8 hours of holiday. Workday adds the overtime calculation tag to 3 of the regular hours, leaving the holiday hours unchanged.

8. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Result

When Workday executes the calculation, it checks each day to see if the threshold is met. Unless you define advanced options, it begins to generate calculation tags chronologically after the threshold is met.

Example: Monthly overtime calculations apply overtime tags to time blocks at the end of the month before time blocks earlier in the month. Daily overtime calculations apply overtime tags to time blocks later in the day before time blocks that are earlier in the day.

Worktags from existing time blocks carry forward to the new time blocks generated by the standard overtime calculation.

Example

Example 1: Overtime after 8 Hours in a Day

Workers earn overtime after 8 hours of work in a day. To define a standard overtime calculation that applies this rule:

1. Specify the Criteria.

Field	Value
Period	*Daily*
Replace Hours Greater than	*8*
Time Calculation Tags	*Regular*

2. Define the Results.

Field	Value
Add Tags	*Overtime*

Field	Value
Remove Tags	*Regular*

Susan enters 10 hours of regular time. Workday generates 2 calculated time blocks:

- An 8-hour time block tagged as *Regular*.
- A 2-hour time block tagged as *Overtime*.

Example 2: Overtime Calculations with Day Breaker

At Vincent's company, a daily overtime calculation applies when employees enter more than 8 worked hours in a day. Vincent enters a time block from 6:00 PM to 6:00 AM. If his day breaker falls within that worked time block, the day breaker splits the time block, and the overtime calculation applies to the resulting calculated time blocks. Possible calculated overtimes include:

If Vincent's Day Breaker is:	First Calculated Time Block	Second Calculated Time Block	Calculated Overtime
9:00 PM	6:00 PM - 9:00 PM	9:00 PM - 6:00 AM	1 hour
Midnight	6:00 PM - 12:00 AM	12:00 AM - 6:00 AM	No overtime
Noon	6:00 PM - 6:00 AM	N/A	4 hours

Next Steps

- Assign time calculation priorities.
- For biweekly overtime calculations, specify a biweekly calculation start date on the work schedule calendars to which the calculation applies.

Related Information

Concepts

Concept: Time Calculations on page 2794

Concept: Effective Dating for Time Calculations on page 2796

Create Work Schedule Calendars

Examples

Example: Calculate Nevada Rolling Overtime on page 2787

Example: Calculate Location-Based Overtime on page 2780

Example: Calculate Monthly Overtime on page 2785

Example: Calculate Double Time on Seventh Consecutive Day on page 2778

Create Time Block Conditional Calculations

Prerequisites

- Create Time Calculation Tags on page 2735.

- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

Create time block conditional calculations to tag time blocks that meet specific conditions when other types of time calculations don't support your requirements. Example: You can tag time entered on a holiday, a specific day of the week, or a particular job to pay a premium for that time.

Conditional calculations can be very powerful when combined with other types of time calculations. Example: You can combine:

- A standard overtime calculation that generates overtime for over 8 hours worked in a day.
- A time block conditional calculation to pay double time for over 8 hours worked in a day, if that day is Sunday.

Conditional time calculations don't split or create new time blocks; they act on existing time blocks.

Steps

1. Access the Create Time Calculation task.
2. For Calculation Type, select *Time Block Conditional Calculation*.
3. In the Criteria section, identify all the conditions that must be met to add or remove tags.

   You can select Workday-provided report fields or create your own true/false conditions based on the *Time Block*, *Time Shift*, *Time Day*, or *Time Week business object* using the Create Calculated Field task.

Option	Description
Time Block Conditions	Select from conditions based on the *Time Block* business object. A time block is a continuous amount of time, such as the number of hours worked or in/out times. Example: Create a true/false condition to tag time blocks that have *France* entered as the location.
Time Shift Conditions	Select from conditions based on the *Time Shift* business object. A time shift is a grouping of consecutive time blocks. Example: Create a true/false condition to tag all hours that exceed 8 hours in a particular shift.
Time Day Conditions	Select from conditions based on the *Time Day* business object. Most Workday-delivered conditions define the start and end times for a day based on the worker's day breaker option. However, you can create your own conditions based on calendar day. Example: 12:00 am to 12:00 am. Example: Select the Workday-delivered report field, *Is Sunday*, to tag time blocks that fall on a Sunday.

Option	Description
Time Week Conditions	Select from conditions based on the *Time Week* business object. A time week is the seven-day period that begins on the start date and day breaker time defined by the work schedule. Example: Create a true/false condition to tag all hours in a week where workers worked over 40 hours.
Worktags	(Optional) Specify the worktags time blocks must have to be subject to the calculation, such as a particular job profile: • Time blocks must have all the worktags that you select in the same row. • If you define more than 1 row, the time block must have all worktags specified in at least 1 row.
Time Calculation Tags	Specify the time calculation tags the time blocks must have to be subject to the calculation results: • Time blocks must have all the time calculation tags that you select in the same row. • If you define more than 1 row of tags, the time block must have all tags specified in at least 1 row.

4. In the Results section, select the time calculation tags to add to or remove from the eligible time blocks.
5. If the day breaker isn't midnight, and Time Day Conditions (such as *Is Holiday*) are Criteria for applying the calculation, specify whether to apply results based on the calendar date or the calculated date.

   In the Time Day Based On field select:

   - Calendar Date to tag calculated time blocks with the calendar date on which the work was performed.
   - Calculated Date to tag calculated time blocks according to the day breaker option.
   - Shift Date to tag calculated time blocks with the shift date according to the Group Time Blocks for Shift Based on option on the time entry template.

   Time Shift Conditions and Time Block Conditions do not require a Time Day Based On field.
6. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Example

Employees receive a premium for *Callout* time worked on Tuesdays that is charged to Marketing. To define a time block conditional calculation that applies this rule:

1. Specify the Criteria.

Field	Value
Time Day Conditions	*is Tuesday*
Worktags	*7200 Marketing Operations*
Time Calculation Tags	*Callout*

2. Define the Results.

Field	Value
Add Tags	*Premium*

Next Steps

Assign time calculation priorities.

Related Information
Concepts
Concept: Effective Dating for Time Calculations on page 2796
Concept: Time Calculations on page 2794
Create Work Schedule Calendars
Example: Calculate the Majority of a Shift on page 2788
Examples
Example: Calculate Location-Based Overtime on page 2780

Set Up Time Block Create Calculations

Prerequisites

- Create Time Calculation Tags on page 2735.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

Use time block create calculations to generate additional calculated time blocks based on specific time conditions. The additional time blocks are independent of other time blocks. Therefore, the calculation isn't tied to a time block and doesn't need an existing time block to execute. Example: You can use this calculation to:

- Reward workers who work a certain number of hours in a week with a bonus set of hours.
- Create a time block of 8 hours on a holiday, whether or not a worker reports time for that holiday.

Steps

1. Access the Create Time Calculation task.
2. For Calculation Type, select *Time Block Create Calculation*.
3. In the Criteria section, identify the conditions that must be met to generate the new time block. You can select from Workday-delivered conditions or create your own using the Create Calculated Field task.

Option	Description
Time Shift Conditions	Select from conditions based on the *Time Shift* business object.

Option	Description
Time Day Conditions	Select from conditions based on the *Time Day* business object. Most Workday-delivered conditions define the start and end times for a day based on the worker's day breaker option. However, you can create your own conditions based on the calendar day.
Time Week Conditions	Select from conditions based on the *Time Week* business object.

4. In the Results section:
   a) Specify the quantity of time for the new time block by entering a fixed value or selecting a calculated field.

      Valid calculated fields include any numeric calculated fields on these business objects:

      - *Worker*.
      - *Time Day* if the calculation uses Time Day Conditions or *Time Week* if the calculation uses Time Week Conditions.

   b) Select the time calculation tags to add to the new time block.
5. In the Time Day Based On field select:
   - Calculated Date to tag calculated time blocks according to the day breaker option.
   - Shift Date to tag calculated time blocks with the shift date according to the Group Time Blocks for Shift Based on option. This option is on the time entry template.
6. (Optional) In the Advanced section, define additional options.

   These options are available when you select a Time Day Condition in the Criteria section:

Option	Description
Must Work Scheduled Day Before Must Work Scheduled Day After	Workday generates time blocks for workers based on whether they worked the scheduled day before or after the day you specified in time day conditions. Workday searches up to 8 days before or after the selected time day condition to find the previous or next scheduled day. If you select both options, they must both be true for Workday to generate a time block. Example: A worker must work the scheduled day before a holiday to qualify for holiday pay.
Use Workday Scheduling Data	Select to enable Workday to determine a worker's scheduled hours from Workday Scheduling rather than work schedule calendars from Time Tracking. You must have the Workday Scheduling enabled for this to take effect. This option is only available when you select the Must Work Schedule Day Before option, Must Work Scheduled Day After option, or both.
Include Calculation Tags	Workday generates time blocks for workers when:

Option	Description
	• They have time blocks tagged with these calculation tags. • The time blocks are on a day that meets the time day conditions you configured.

7. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Result

For day- and shift-based calculations, Workday displays the additional time blocks on that day. For week-based calculations, the additional time blocks display on the last day of the week.

Workday includes the additional calculated time blocks in weekly totals. When you select Sum Based on Calculated Quantity on the time entry template, Workday also includes the additional calculated time blocks in the daily totals.

Example

Generate a bonus time block of 5 hours if a worker enters 45 or more hours in a week.

1. Create a calculated field called *Reported time in a week* that sums the time a worker has reported in a week:

    a. Access the Create Calculated Field task.
    b. Define the calculated field:

Field	Value
Field Name	*Reported time in a week*
Business Object	*Time Week*
Function	*Sum Related Instances*
Related Field	*Time Blocks for a Week*
Instances where condition is true	*Is Reported Time Block*
Field to Sum	*Total Hours (Time Tracking)*

2. Create a calculated field called *Reported time greater than or equal to 45 hours*. The report field returns true if the sum of reported time in a week is greater than or equal to 45 hours:

    a. Access the Create Calculated Field task.
    b. Define the calculated field:

Field	Value
Field Name	*Reported time greater than or equal to 45 hours*
Business Object	*Time Week*
Function	*True/False Condition*
Field	*Reported time in a week*
Operator	*greater than or equal to*
Comparison Type	*Value specified in this filter*
Comparison Value	*45*

3. Create the calculation:

Field	Value
Time Week Conditions	*Reported time greater than or equal to 45 hours*
Quantity (value)	*5*
Add Tags	*Regular*

Next Steps

Assign time calculation priorities.

Related Information

Concepts

Concept: Effective Dating for Time Calculations on page 2796
Concept: Time Calculations on page 2794
Concept: Calculated Fields

Create Time Calculations for Statutory Holidays (CAN)

Prerequisites

- Confirm that the workers are in a Canadian pay group.
- Create holiday calendars.
- Create statutory holiday configurations.
- Create a calculation tag to use in Canadian statutory holiday calculations.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

You can use holiday time block create calculations to create time blocks for workers on Canadian statutory holidays. Workday uses the statutory holiday configurations you make to determine which workers are eligible for the time calculation.

Steps

1. Access the Create Time Calculation task.
2. From the Calculation Type prompt, select *Holiday Time Block Create Calculation*.
    - The Holiday Time Block Create calculation supports effective dates, but this functionality does not apply to Canada statutory holidays. This is because the prerequisite task to create statutory holiday configurations does not support effective dates.
3. From the Jurisdiction prompt, select the calculation method for holiday-based pay.
    - To calculate holiday pay based on the provincial and territorial statutory holiday pay you configured on the Statutory Holiday Configuration task, select Provincial.
    - To use federal guidelines to calculate statutory holiday pay for federal workers, select Federal.
4. In the Eligibility Criteria section, select the Use Statutory Holiday Configuration Eligibility check box.

5. In the Results section, select Quantity - Use Statutory Holiday Configuration Look Back.

   Workday calculates the quantity by dividing the total hours worked over the look back period by the number of days in the look back period.

   The province you select isn't configurable. It determines the length of the look back period and the lookback reference point. On the statutory holiday configuration, you can view the:

   - Length of the look back period in days.
   - Whether the look back reference point is the end of the week preceding the holiday, or the day before the holiday.

   Workday determines the total hours worked by including hours that are:

   - Tagged with the calculation tags you define in the Worked Hours Calculation Tags field on the statutory holiday configuration.

   Workday determines the number of days in the look back period by totaling the days in the look back period on which there are time blocks.
6. In the Add Tags prompt, select the calculation tag you defined for the Canadian statutory holiday you configured.
7. In the Groups tab, add time calculation group snapshots to specify which workers are eligible for the calculation.

   The statutory holiday time block may list a different value than what is calculated in the statutory holiday earning pay component related calculation (PCRC) if there are unapproved time blocks in the look back period. Unapproved time blocks are not included in Payroll calculations.

Next Steps

- Assign time calculation priorities with the Maintain Time Calculation Priorities task.
- Using Workday Payroll, set up earnings for holiday pay.

Related Information

Concepts

Concept: Time Calculations on page 2794

Set Up Statutory Holiday Eligibility (CAN) on page 2666

Example: Configure Statutory Holiday Pay for Provinces (CAN)

Assign Time Calculation Priorities

Prerequisites

- Define time calculations.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

Assigning a priority on a time calculation allows Workday to perform a series of calculations on a worker's time. A calculation can use the results from another calculation to support complex time tracking policies.

When you assign a priority to each time calculation, you specify the order of execution when a worker is subject to multiple time calculations. Without a priority, or with multiple calculations that have the same priority, time calculations can execute in an unexpected order, causing impacts to other areas such as Payroll. Workday recommends configuring time calculations so that workers aren't eligible for multiple time calculations that have the same priority.

In general, perform:

- Calculations that produce results for other calculations before the calculations that need them.
- Double time calculations before overtime calculations.

- Daily overtime calculations before weekly overtime calculations.

You must perform monthly overtime calculations last. Other calculations can't reference monthly overtime calculation tags.

Steps

1. Access the Maintain Time Calculation Priorities task.
2. In the Priority column, enter an alphanumeric value, such as *ABC10*, to represent the order in which to execute the time calculation.

   Time calculations are executed in alphanumeric order, with numerics having a higher priority. Example: A priority of 50 has a higher priority than A50.

   Note: When a worker is eligible for more than 1 time calculation that have the same priority, those time calculations can execute in an unexpected order.

   Tips for assigning priorities:

   - Leave gaps between priorities so that you can more easily change priorities, if necessary.
   - If using numeric characters, use the same number of digits for each priority. Example: 110, 120, 130.
   - Consider using separate ranges for time calculations that apply to different groups of employees, such as workers in different countries.

     Example:

     - USA1000 - USA2000 for the U.S.
     - FRA2001 - FRA3000 for France
3. Click OK and confirm that the priorities are in the order you expect.
4. Review the View Worker's Time Eligibility report to validate your changes for a particular worker.

Result

When Workday performs calculations, it executes the calculations according to the priorities you set. Workday also displays the priority when you view or edit a time calculation.

Example

Employees receive overtime when they work over 8 hours in a day or over 40 hours in a week. To apply these rules, define 2 overtime calculations that apply to time blocks with the *Regular* time calculation tag:

Calculation Rule	Priority
Daily Hours > 8	10
Weekly Hours > 40 (excludes hours greater than 8 in a day)	20

Sam enters 10 hours of worked time on Monday through Saturday. Workday first applies the daily overtime calculation, and creates 2 calculated time blocks for each day worked:

- 8 hours tagged *Regular*.
- 2 hours tagged *Overtime*.

It then applies the weekly overtime calculation to see if Sam's regular hours exceed the 40-hour threshold, starting from the end of the week. Workday tags the 8 hours of *Regular* time for Saturday as *Overtime*.

Create Time Calculation Groups

Prerequisites

- Create time calculations.
- Create Worker Eligibility Rules for Time Tracking on page 2826.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

Create time calculation groups to specify worker eligibility criteria for time calculations. Typically, eligibility for time calculation groups is based on location or union organization. Workers can qualify for multiple time calculation groups. Workday checks to see that the worker meets the eligibility rules on the last day of the week on the time entry calendar (or the worker's termination date if earlier).

Steps

1. Access the Create Time Calculation Group task.
2. Create a snapshot that is active as of a particular date.

   Select the effective date from the Effective Date prompt.
3. Select the time calculations to include in the group from the Time Calculations prompt.
4. Specify who is eligible for the time calculations from the Worker Eligibility prompt.

   Select one or more time tracking eligibility rules. Workers must meet the criteria for all eligibility rules you select when they report time.

   - Eligibility is based on the worker's primary job unless you define rules that reference all jobs instead.
   - Eligibility rules based on the *Position* are not available for time calculation groups.
5. (Optional) From the Country / Country Region prompt, select countries or country regions that the time calculation group applies to. Selecting a value in this field improves performance for Time Tracking transactions that check time calculation groups.

Example

Create a time calculation group for union workers. Select all time calculations that are valid for union members and specify that union membership is a requirement for eligibility.

Next Steps

- You can create additional calculation group snapshots by clicking Add +.
- Review the View Worker's Time Eligibility report to validate your changes for a particular worker.

Related Information
Concepts
2024R1 What's New Post: Effective Date Support in Time Tracking

Steps: Set Up Calculated Time Offs

Prerequisites

- Create time entry templates.

  See Steps: Create Time Entry Templates on page 2672.
- Create time offs.

  See Steps: Set Up Time Offs on page 2278.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

You can create calculated time off, making it easier to take into account both worked time and time off. Workers can enter time off through Manage Absence or time entry calendar. Workday applies time calculation tags and time calculations to time off blocks. This feature enables you to ensure that workers receive the same premiums for their time off as they do for their worked time.

Steps

1. Access the Edit Time Entry Template task.
2. On the Effective-Dated tab, expand the Time Entry section.
3. (Optional) Complete the Time Off Calculations section:

Option	Description
Enable Calculated Time Off	Enables Workday to apply time calculations to time offs. When you select this option, it overrides the Run Calculations with Time Off Approval option on the Edit Tenant Setup - HCM task for this template.
Run Calculations After Date	Specify the date on which you want Workday to start creating calculated time off. This date can be in the past or the future. When you enter a date, enter the start day of the week so that Workday calculates all time off blocks in the week. Otherwise, Workday will calculate some of the blocks in the week but not the rest.

4. Access the Edit Time Off task for the time offs that you want Workday to apply time calculations to. As you complete the task, consider:

Option	Description
Time Calculation Tag	Select 1 or more time calculation tags to add to the time off blocks.
Calculate Quantity Based on Start and End Time	(Optional) Select this option for time offs used by workers who enter In and Out times. This option ensures that Workday will apply premiums as defined by shift differential calculations.
Enable Crossing Midnight	(Optional) Select this option to enable workers to submit a single time off request for a time off that's configured with start and end times when that time off crosses midnight. Available only when you select 1 of these Entry Option values: • *Enter through Time Off Only*, and you also select the Display Start and End Time check box. • *Enter through Time Tracking Only*, and you also select the Calculate Quantity Based on Start and End Time check box. • *Enter through Time Tracking or Time Off*, and you also select the Calculate

Option	Description
	Quantity Based on Start and End Time check box. Note: A time off that crosses midnight only has a reported block. To create a calculated time block for the time off, select the Enable Calculated Time Off check box on the time entry template.

5. Access the Edit Time Calculation task for any calculations that you want to apply to time offs. You can't use this feature with minimum rest time calculations.

   In the Include Calculation Tags grid, add the time calculation tag that you applied to the time off. Workday will include time off blocks with this calculation tag in time calculations.

Result

When you enter time off in the range of -7 to +7 days from the current date, Workday runs calculations in real time. If the range crosses into an adjacent week, Workday runs calculations for the entire current week and adjacent week. If you enter or edit time off outside of this range, Workday runs a job every 2 hours to perform the calculations.

After Workday applies calculations to time off blocks, the blocks have a Calculated tab and a History tab. Workday displays time off blocks that require submission as shaded gray (the same way Workday displays unsubmitted time blocks). After workers enter time off through the Absence calendar, they must also submit their time through the Time Tracking calendar for time calculations to run. Resubmit time if you make any adjustments after submitting time for the period.

Example

As of October 1, 2021, you assign Ben Adams to an evening shift. As an evening shift worker, Ben receives a premium for the hours worked between 8:00PM and 12:00AM. When Ben takes time off between 8:00PM and 12:00AM, he receives the same shift premium.

1. Access the Edit Time Entry Template task. Select the *USA - CA - In/Out - SHIFT* time entry template. Enter these values:

Field	Value
Enable Calculated Time Off	Select the check box.
Run Calculations After Date	*10/01/2021*

2. Access the Edit Time Off task. Select the *USA Vacation Time Off (Hourly)* time off. Enter these values:

Field	Value
Time Calculation Tag	*Paid Time Off*
Calculate Quantity Based on Start and End Time	Select the check box.

3. Access the Edit Time Calculation task. Select the *Shift Premium - Evening* shift differential calculation. In the Include Calculation Tags grid, add a row, and select the *Paid Time Off* time calculation tag.

Ben enters time off for October 14, 2021 from 8:00 PM to 12:00 AM, then submits his time. Ben's manager clicks the time off block on his calendar and views the details. She sees that Workday applied the *Shift Premium - Evening* tag.

Next Steps

- Access the My Team's Time and Time Off report to report on workers' reported time, calculated time, and calculated time off. It also displays blocks that workers need to resubmit on the time entry calendar.
- You can send notifications to workers who need to resubmit their time off on the time entry calendar. Copy the Workers with Time Off for Resubmission report. You can use the Alerts framework for My Tasks notifications, or the Scheduled Distributions framework for email or mobile push notifications.

  See Steps: Set Up Time Off Notifications on page 2427.

Related Information
Concepts
Concept: Calculated Time Offs on page 2803

Manually Run Time Calculations

Prerequisites

Security: *Process: Run Time Calculations for a Date Range* domain in the Time Tracking functional area.

Context

You can manually run time calculations when Workday doesn't automatically run calculations for these reasons:

- Worker eligibility changes for these Time Tracking components:
  - Time code groups.
  - Time entry templates.
  - Time period schedules.
  - Time calculation groups.
- You change time calculation configurations.
- A time calculation generates a calculated time block without an associated reported time block.
- You request time off, but you didn't configure your tenant to run time calculations automatically upon time off approval.
- You configure your tenant to defer time clock event matching and processing.
- You configure daily evaluation of worker eligibility for time calculations to run in the past.

Workday recommends that you don't run calculations for a period that contains work schedule calendar changes. If a period contains work schedule calendar changes, run time calculations for a subperiod instead.

Workday evaluates the worker's day breaker eligibility daily when running calculations. Workday evaluates the start day of week eligibility for each week included in the date range, rather than using only the start day of week that was effective at the start of the date range. If you select daily evaluation of worker eligibility for time calculations, then Workday evaluates eligibility daily for the date range.

When you manually run time calculations, Workday doesn't calculate time for terminated workers, even if the termination date is after the dates selected as the process parameters.

You can only run calculations on an open period. When you run calculations for a date range that includes both open and closed periods, Workday runs calculations only on the open periods. Example: You configure time entry to open on May 8, which is a holiday. When you run time calculations on May 1, Workday doesn't generate the holiday time block because the period isn't yet open. If you remove the restrictions on when time entry opens and run calculations on May 1, Workday generates the holiday time block.

To test the impact of manually running time calculations for an extensive date range, Workday recommends that you first manually run time calculations within a small date range and confirm that the output is what you expect. You can use the Time Calculation Debugger report to identify the time calculations that were evaluated and applied for a week for a worker.

Steps

1. Access the Run Time Calculations for a Date Range report.
2. Select the workers for whom you'd like to run calculations.

   You must have security access on the *Enter Time* business process security policy to select workers.

   If you select all workers in the report, once the process runs, Workday refreshes the worker list according to the criteria you select. The workers processed might change from the list of workers you initially selected.
3. Select a Run Frequency.

   When you select a recurring run frequency, Workday displays the Schedule tab, where you can configure when or how frequently to run time calculations for a particular date range.
4. Enter a Request Name.

   Workday uses the request name in reports.
5. As you complete the Selection Criteria section, consider:

Option	Description
Static Range	Select a Start Date and an End Date to define the fixed time period to run time calculations. Example: You want to run time calculations multiple times for the date range of 2024-12-24 to 2024-01-07 to capture time offs that workers may have forgotten to enter ahead of time.
Dynamic Range	Specify a date range that shifts based on the number of days in the Days Before Run Date and Days After Run Date fields, and the Next Run Date to run time calculations. Example: If you want to run time calculations every week for the previous week's time entries, schedule a weekly recurrence that runs every week and 7 days before the Next Run Date. The Next Run Date field displays the date when Workday will next run time calculations, based on the options you select on the Schedule tab. When you schedule a recurrence, Workday will run calculations for the dynamic period you set up. Note: If your run frequency is *Dependent* or *Custom Recurrence*, Workday doesn't display a date in the Next Run Date field, but will still use the days you specified in the Days Before Run Date and Days After Run Date fields to run calculations. If your run frequency is *Run Now*, the Next Run Date field displays today's date.

6. For a recurring run frequency, see Schedule Reports or Report Groups for considerations to complete the Schedule tab.

Example

You want to run time calculations every Monday morning at 8:00 AM for the 30 days prior. You want this schedule to occur from 2024-03-18 to 2024-06-16. When you access the Run Time Calculations for a Date Range report, select *Weekly Recurrence* for the run frequency. On the Schedule tab, set up a weekly recurrence on Mondays at 8:00 AM and choose a range of recurrence starting on *03/18/2024* and ending on *06/16/2024*. On the Selection Criteria tab, under the Dynamic Range section, the Next Run Date field displays 03/18/2024. Enter *30* in the Days Before Run Date field.

On 2024-03-18 at 8:00 AM, Workday runs time calculations on all time entries from 2024-02-17 to 2024-03-17. Next Monday, on 2024-03-25, Workday runs time calculations on all time entries from 2024-02-24 to 2024-03-24.

Next Steps

If the calculations change a worker's submitted time, you must resubmit that time.

You can run these reports to view the status or schedules of the calculations:

- Process Monitor
- Scheduled Future Processes

Related Information
Concepts
Concept: Daily Evaluation of Worker Eligibility for Time Calculations on page 2801

Concept: Time Calculation Debugger on page 2802
Tasks
Set Up Period Schedules for Time Tracking on page 2822

Reference: Time Calculation Types

You can create these types of time calculations using the Create Time Calculation task:

Calculation Type	What it Does	Copy worktags?	Example
Accumulated Overtime	Tags time blocks when workers exceed thresholds configured in the time accumulator threshold rules.	No	When workers exceed their monthly overtime limit, tag extra hours as double time.
Consecutive Day	Tags time blocks that occur every *Nth* consecutive day of the work week.	Yes	Tag regular hours entered for the seventh consecutive workday of the week as overtime.
Flextime	Tags time blocks to match the flextime configuration.	No	Tag mandatory core hours separately from flexible hours.
Holiday Time Block Create	Generates additional time blocks when a holiday exists on the day and optionally applies additional eligibility from the statutory holiday configuration.	No	Create a holiday time block for statutory holidays that meets the requirements for a particular province.

Calculation Type	What it Does	Copy worktags?	Example
Minimum Daily Hours	Creates additional calculated time blocks when reported time is below the minimum daily hours specified.	Yes	Generate additional hours for workers on call when they enter less than the guaranteed number of hours for a day.
Minimum Rest	Tags time blocks worked during a specified rest time.	No	Pay workers a premium if they've worked without taking sufficient rest between shifts.
Minimum Weekly Hours	Creates additional calculated time blocks when reported time is below the minimum weekly hours specified.	No	Generate unpaid hours for salaried employees when they enter less than the minimum number of hours for a week.
Override Rate	Assigns override rates to eligible calculated time blocks.	Yes	Pay workers a different rate when they work for a particular cost center.
Predictive Scheduling	Generates penalty time blocks when managers change workers' schedules without sufficient advanced notice.	No	Create a penalty time block when a manager changes a worker's shift less than 24 hours before the shift start time. To use Predictive Scheduling, you need both the Time Tracking and Workday Scheduling products.
Schedule Deviation	Tags time blocks that a worker worked outside of their work schedule calendar.	Yes	Pay workers when they work originally unscheduled hours.
Shift Differential	Tags time blocks between a particular start and stop time during the day.	Yes	Tag hours worked during the night shift for premium pay.
Standard Overtime	Creates additional calculated time blocks for hours that exceed an overtime threshold.	Yes	Tag overtime hours so Payroll pays them at the correct rate.
Time Block Conditional	Tags time blocks that meet true/false conditions based on the day, week, or individual time blocks.	Yes	Tag hours for premium pay based on the worker's job profile or other worktag values the worker enters.
Time Block Create	Generates additional time blocks based on certain time conditions.	No	Create a bonus time block of 5 hours if a worker works more

Calculation Type	What it Does	Copy worktags?	Example
			than 45 hours in a week.

Time Accumulator

Steps: Set Up the Time Accumulator Framework

Context

Time accumulators enable you to configure working time or overtime restrictions based on your company or country policies. Using accumulators can reduce the risk of workers exceeding your work-hour limits. The time accumulator framework can track working time over longer reference periods against a defined threshold. You can:

- Track the number of hours or days that an employee has accumulated based on 1 or more calculation tags.
- Define work-hour thresholds and compare them against the sum or average of hours for a worker over a reference period.
- Alert managers to take corrective actions before workers exceed work-hour limits.
- Use the accumulated overtime calculation to tag time differently when workers exceed their work-hour limits.
- Allow workers to opt out of time accumulator threshold rules for working time or overtime restrictions (such as working time directives), and opt back in when necessary.
- Allow managers to view their team's time accumulator threshold rules status, opt workers out of time accumulator threshold rules, and opt back in when necessary.

Steps

1. Create Time Accumulators on page 2768.
2. Create Custom Business Processes.

   Configure these business processes to route worker opt-out or opt-in requests for approval:

   - *Time Accumulator Threshold Rule Opt Out*
   - *Time Accumulator Threshold Rule Opt In*
3. Create Time Accumulator Threshold Rules on page 2769.
4. Maintain Time Accumulator Threshold Rule Priorities on page 2772.
5. Create Accumulated Overtime Calculations on page 2772.
6. Maintain priorities for accumulated overtime calculations.

   Enter lower priorities for accumulated overtime calculations to ensure that Workday runs the calculations last in the majority of cases for rules that contain this type of calculation.

   See Assign Time Calculation Priorities on page 2758.
7. Mass Assign Time Accumulator Threshold Rules on page 2773.
8. (Optional) Run Time Accumulator Calculations on page 2773.
9. (Optional) Add the *Assign Time Accumulator Threshold Rule* service step to these business processes:

   - *Change Job*
   - *Change Organization Assignments for Worker*
   - *Hire*

   The service assigns workers to threshold rules automatically based on changes that impact their eligibility.

   See Edit Business Processes.

10. (Optional) In the Time and Scheduling Hub, configure the Workers Approaching Time Accumulator Threshold card.

    Workday displays this card on the Overview section of the hub. The card helps managers quickly identify workers approaching or exceeding their threshold rule based on the threshold warning percentages.

    See Steps: Set Up the Time and Scheduling Hub.

Result

When workers enter time or time off as usual, Workday starts tracking the time against the time accumulator threshold rules.

Next Steps

- Access the View Worker's Time Eligibility report to verify the assignment of time accumulator threshold rules. After running the Mass Assign Time Accumulator Threshold Rules task, 1 or more threshold rules for a worker are visible on the report.
- Report on workers' time accumulations using these reports:
    - All Time Accumulators
    - All Time Accumulator Threshold Rules
    - Time Accumulations for Workers
    - View Time Accumulator Threshold Rule History for Workers

Related Information

Concepts

The Next Level: All Things: Time Tracking 2023R2

2023R2 What's New Post: Time Accumulator

2023R1 What's New Post: Time Accumulator

2022R2 What's New Post: Time Accumulator

Create Time Accumulators

Prerequisites

Create time calculation tags to include in the time accumulator.

Security: *Set Up: Time Tracking* domain in the Time Tracking and Time Tracking Hub functional areas.

Context

You can create time accumulators to configure working time or overtime restrictions. Time accumulators run after time calculations and use time calculation tags to pull the appropriate time blocks into threshold calculations. You can include:

- Reported time off with a calculation tag. You can select the tag from the Time Calculation Tag prompt on the Create Time Off task. Workday pulls the time off units into the threshold calculation if you add the calculation tag to the time accumulator.
- Calculated time off. You can select Include Calculation Tags on the Create Time Entry Template task. Workday creates calculated blocks for time off and pulls them into the threshold calculation if you add the calculation tag to the time accumulator. When calculated time off isn't available, the accumulator includes reported time off if you add the calculation tag to the accumulator.

Steps

1. Access the Create Time Accumulator task.

2. As you complete the task, consider:

Option	Description
Add Time Calculation Tags	Select 1 or more time calculation tags for use in the accumulator. Don't use temporary time calculation tags. Workday adds time blocks with these tags if they're in the period of the rule. Alternatively, if you want to include all time calculation tags except the ones that you select, select the Exclude Selected Tags check box.
Time Day Based On	Select 1 of these options to include time blocks with the selected tags based on: • *Calculated Date*, for Workday-generated blocks, or blocks created using the *Time Block Create* calculation type that don't have a calendar date. • *Calendar Date*, for calculated blocks that are part of a period. • *Shift Date*, for groups of time blocks. When the shift date isn't available, Workday uses the calculated date.
Deduct Time Calculation Tags	Select 1 or more time calculation tags for use in the time accumulator. Don't use temporary time calculation tags. Workday deducts time blocks with these tags if they're in the period of the rule. Example: You can deduct time calculation tags for compensatory time or time off in lieu of overtime.

Related Information

Concepts

Create Time Calculation Tags on page 2735

Create Time Accumulator Threshold Rules

Prerequisites

- Create time accumulators to include in the rules.
- Security: *Set Up: Time Tracking* domain in the Time Tracking and Time Tracking Hub functional areas
- Configure the *Time Accumulator Threshold Rule Opt Out* and *Time Accumulator Threshold Rule Opt In* business processes and security policies in the Time Tracking functional area.

Context

You can create time accumulator threshold rules for a rule group to specify the hours a group of workers shouldn't exceed in a reference period.

Steps

1. Access the Create Time Accumulator Threshold Rules task.
2. Enter a Rule Group Name. You create threshold rules within rule groups. Create rule groups based on how you want to organize accumulator threshold rules in your organization.

3. (Optional) Enter percentages at which to display warnings on the Workers Approaching Time Accumulator Threshold card if you're using the card in the Time and Scheduling Hub.

   The threshold levels apply to all rules in the rule group. The value that you enter for Threshold Level 1 Warning Percent must be less than the Threshold Level 2 Warning Percent value.
4. Click Add Rule.
5. As you complete the grid, consider:

Option	Description
Time Accumulator	Select the time accumulator to which the rule applies.
Worker Eligibility	Select 1 or more worker eligibility rules for Time Tracking. For performance reasons, Workday recommends that workers aren't eligible for more than 2 time accumulators at a time. Workers can be eligible for multiple threshold rules per time accumulator without any performance impacts. Workday evaluates the eligibility when you assign workers to the rule using the Mass Assign Time Accumulator Threshold Rules task.
Start Date	Select the date from which the rule applies. Workday recommends that the start date aligns with the first day of the period.
End Date	(Optional) Rules without an end date start again when the Reference Period ends, based on the Length. Workday recommends that you specify an end date for rules that you want to use for a fixed period of time.
Reference Period	Select a Unit of Time, from 1 of these options: • *Rolling Periods* • *Static Periods* • *Period Schedules* Enter a Length when you select a rolling or static period. When you select *Period Schedule*, you can't enter a length.
Threshold	Select the Calculation option to use for comparison against the threshold Amount. The values that you can select depend on the unit of time for the reference period. See Reference: Time Accumulator Threshold Calculations on page 2776.
Standard Week Excludes	Select the days of the week to exclude from the rule when you select the *Average Quantity per Standard Day* calculation option. *Standard Day* is a calendar day. Workday counts hours with the specified calculation tags

Option	Description
	on any day, except on days that you select in this column. *Worked Day* is a day on which time or time off is present. Days without time or time off don't count. If you select an average as the calculation in the threshold rule, Workday divides the quantity in the accumulator by the number of days worked.
Calculated Results	Specify the time calculation tags to add or remove time if a worker exceeds their threshold limit. Example: When a worker exceeds 160 hours in a month, you might want to add a calculation tag for overtime and remove a calculation tag for regular time. Workday displays the Calculation Priority value after you configure the time accumulator threshold rule priority. See Maintain Time Accumulator Threshold Rule Priorities on page 2772. Workday includes rules in the accumulated overtime calculation only if they have calculation tags. Workers should be eligible for only 1 accumulated overtime calculation. If a worker is eligible for more than 1, Workday runs the calculation with the lower priority.
Opt-In/Opt-Out Configuration	(Optional) Select the Allow Opt Out check box to enable workers to opt out of the rule and opt back in when necessary. This also enables managers to opt their workers out of the rule and opt back in when necessary. Set the minimum number of days notice required for workers to opt out or back into the rule. Enter values from 0-99 for: • Opt Out Notice Period (Days) • Opt In Notice Period (Days Click Configure Display Text to enter the policy text that Workday displays to workers when they opt out or into time accumulator threshold rules. Ensure that you configure the *Time Accumulator Threshold Rule Opt Out* and *Time Accumulator Threshold Rule Opt In* business processes to enable workers to opt out of the rule and opt back in, and to enable managers to initiate the process to opt workers out of and into the rules.

Option	Description
	Workday displays an Opt Out button beside the rule on the worker's Time Accumulator Rules report, or an Opt In after the worker opts out. Managers can use Opt Workers Into Time Accumulator Threshold Rules and Opt Workers Out of Time Accumulator Threshold Rules tasks to opt workers out and back into the rules.

Related Information

Concepts

Create Worker Eligibility Rules for Time Tracking on page 2826

The Next Level: Opting In and Out of Time Accumulator Threshold Rules

The Next Level: All Things: Time Tracking 2023R2

Maintain Time Accumulator Threshold Rule Priorities

Prerequisites

Create time accumulator threshold rules.

Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

You can set the evaluation order for time accumulator threshold rules. Workday evaluates rules with a higher priority first and the output of each rule flows into the subsequent rule.

Steps

1. Access the Maintain Time Accumulator Threshold Rule Priorities task.

   You can view all of the time accumulator threshold rules in your tenant, across all rule groups where you've added or removed time calculation tags.
2. In the Priority column, enter a priority value for each rule.

Result

Workday displays the rules in priority order. You can also sort by threshold rule. When you set the priority for a rule, Workday displays the priority on the View Time Accumulator Threshold Rules report.

Create Accumulated Overtime Calculations

Prerequisites

- Create Time Calculation Groups on page 2760.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Context

You can create accumulated overtime calculations for evaluating time accumulator threshold rules for workers.

Steps

1. Access the Create Time Calculation task.

2. From the Calculation Type prompt, select *Accumulated Overtime Calculation*.
3. In the Groups tab, add time calculation group snapshots with the appropriate effective dates to specify which workers are eligible for the calculation.

Next Steps

Configure criteria for the calculation using the Create Time Accumulator Threshold Rules task.

Related Information

Concepts

Concept: Effective Dating for Time Calculations on page 2796

Mass Assign Time Accumulator Threshold Rules

Prerequisites

Security: *Process: Mass Assign Time Accumulator Threshold Rules* domain in the Time Tracking functional area.

Context

You can assign multiple workers to time accumulator threshold rules. You can only assign workers that you support in a role-based security group. When you don't have a role that includes all the workers you want to assign, create a new role, and assign yourself to the top level of the organization.

Steps

1. Access the Mass Assign Time Accumulator Threshold Rules task.
2. From the Run Frequency prompt, select when to initiate the time accumulator threshold rules assignment for workers.
3. Enter a Start Date and End Date to configure the date range for calculating time accumulations for the workers.

   The maximum date range is 90 days. To calculate time accumulations for more than 90 days, run the task multiple times. Each time, specify a range of up to 90 days further in the past.
4. (Optional) Use filtering to find the workers and evaluate whether they're eligible for time accumulator threshold rules.

   When you don't filter by organization, the results include all active workers as of the current date in all organizations for which you have a security role.
5. (Optional) From the Worker prompt, select 1 or more workers.

Result

Workers can use the Time Accumulator Rules report to view all the time accumulator threshold rules that they're eligible for so that they can:

- Understand what calculations apply to their time.
- Opt out of or opt back into rules.

Related Information

Concepts

The Next Level: All Things: Time Tracking 2023R2

Run Time Accumulator Calculations

Prerequisites

Create time accumulators.

Security: *Process: Mass Assign Time Accumulator Threshold Rules* domain in the Time Tracking functional area.

Context

You can retroactively run time accumulator calculations for workers who are eligible for a threshold rule as of a date range. Workday includes time entry units for workers towards eligible time accumulator threshold rules.

Steps

1. Access the Run Time Accumulators task.
2. From the Run Frequency prompt, select whether to initiate the time accumulator calculations for workers now or at a later date.
3. Enter a Start Date and End Date to configure the date range for calculating time accumulations for the workers.

   The maximum date range is 90 days. To calculate time accumulations for more than 90 days, run the task multiple times. Each time, specify a range of up to 90 days further in the past.
4. From the Time Accumulator prompt, select 1 or more time accumulators to run.

Example: Track Working and Overtime Restrictions Against a Threshold

This example illustrates how to use time accumulators to track time over long reference periods against a specified threshold. Workday can then tag time differently once workers exceed the threshold.

Context

Your organization wants to use time accumulators to track regular working time and overtime for workers in:

- The US: You want to create 2 time accumulators and a threshold rule to ensure that workers don't exceed the working time restrictions. When workers work more than 160 hours in a month, you want to tag their regular working hours as overtime.
- Canada: You want to create a time accumulator for flextime and a threshold rule.

Prerequisites

- Create time entry templates.

  See Steps: Create Time Entry Templates.
- Create time offs.

  See Steps: Create a Time Off.
- Create Worker Eligibility Rules for Time Tracking.
- Create an accumulated overtime calculation.

  See Create Accumulated Overtime Calculations.
- Create Time Calculation Tags.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Steps

1. Create a time accumulator for regular working time.
   a) Access the Create Time Accumulator task and enter:

Field	Value
Name	*US Working Time*

Field	Value
Add Time Calculation Tags	*Regular*
Time Day Based On	*Calculated Date*

b) Click OK and Done.

2. Create a time accumulator for overtime.
    a) Access the Create Time Accumulator task and enter:

Field	Value
Name	*US Overtime*
Add Time Calculation Tags	*Overtime*
Time Day Based On	*Calculated Date*

b) Click OK and Done.

3. Create a time accumulator for flextime.
    a) Access the Create Time Accumulator task and enter:

Field	Value
Name	*Flextime*
Add Time Calculation Tags	*Flextime*
Time Day Based On	*Calculated Date*

4. Create the time accumulator threshold rule for US workers.
    a) Access the Create Time Accumulator Threshold Rules task and enter:

Field	Value
Rule Group Name	*US Shift Workers*
Threshold Level 1 Warning Percent	*65*
Threshold Level 2 Warning Percent	*90*

b) In the rule grid, add a row with these settings:

Field	Value
Rule Name	*Working Time*
Time Accumulator	*US Working Time*
Worker Eligibility	*USA-CA - Time Template - In/Out - Shift*
Start Date	*11/01/2022*
Unit of Time	*Static Months*
Length	*1*
Calculation	*Total Quantity per Period*
Amount	*160*
Add Calculation Tags	*Overtime*
Remove Calculation Tags	*Regular*

c) Click OK and Done.

5. Create the time accumulator threshold rule for Canadian workers.
    a) Access the Create Time Accumulator Threshold Rules task and enter:

Field	Value
Rule Group Name	*Canada Workers*
Threshold Level 1 Warning Percent	*65*
Threshold Level 2 Warning Percent	*90*

    b) In the rule grid, add a row with these settings:

Field	Value
Rule Name	*Flextime Accumulation*
Time Accumulator	*Flextime Accumulation*
Worker Eligibility	*Global Exclusions - Time Template - Hours Only Non Project Workers*
Start Date	*10/01/2022*
Unit of Time	*Static Months*
Length	*3*
Calculation	*Total Quantity per Period*
Amount	*20*
Add Calculation Tags	*Flextime Paid at 1.25*

    c) Click OK and Done.

Reference: Time Accumulator Threshold Calculations

You can configure time accumulator threshold rules using different combinations of reference period and threshold calculations. The calculation options that you can select depend on the selection that you make for Unit of Time in the Reference Period on the Create Time Accumulator Threshold Rules task.

Calculation	Units of Time	Description
Average Quantity per Week	*Rolling Weeks* and *Static Weeks*	The total quantity in the period to date based on added or deducted calculation tags, or both, divided by the number of weeks in the period. For rolling periods, Workday calculates the denominator after first adjusting the period start and end dates. Example: During week 1 of a rolling period, the denominator is *1*. In week 2, the denominator is *2*, and so on, until the final week in the period. When new weeks occur in a rolling period, Workday drops the previous week and maintains the period length until the end date of the rule.

Calculation	Units of Time	Description
		For static periods, Workday uses the period length of the threshold rule as the denominator.
Average Quantity per Worked Day	• *Rolling Days* and *Static Days* • *Rolling Months* and *Static Months* • *Rolling Weeks* and *Static Weeks*	The total number of units in the period to date based on added or deducted calculation tags, or both, divided by the number of days in the period.
Average Quantity per Month	*Rolling Months* and *Static Months*	The total quantity in the period to date based on added or deducted calculation tags, or both, divided by the number of months in the period. For rolling periods, Workday calculates the denominator after first adjusting the period start and end dates. Example: During month 1 of a rolling period, the denominator is 1. In month 2, the denominator is 2, and so on, until the final number of months in the period. When new months occur in a rolling period, Workday drops the previous month and maintains the period length until the end date of the rule. For static periods, Workday uses the period length of the threshold rule as the denominator.
Total Accumulated Days	*Indefinite*	The total number of days worked to date based on added or deducted calculation tags, or both.
Total Accumulated Quantity	*Indefinite*	The total number of accumulated hours to date based on added or deducted calculation tags, or both.
Total Days per Period	• *Rolling Days* and *Static Days* • *Rolling Months* and *Static Months* • *Rolling Weeks* and *Static Weeks*	The total number of days worked in the period to date based on added or deducted calculation tags, or both.
Total Quantity per Period	• *Rolling Days* and *Static Days*	The total number of units in the period to date based on added

Calculation	Units of Time	Description
	• *Rolling Months* and *Static Months* • *Rolling Weeks* and *Static Weeks*	or deducted calculation tags, or both.
Average Quantity per Standard Day	• *Rolling Days* and *Static Days* • *Rolling Months* and *Static Months* • *Rolling Weeks* and *Static Weeks*	The total number of units in the period to date based on added or deducted calculation tags, or both, divided by the number of days in the period. Workday excludes any days or holidays that you select under Standard Week Excludes. For rolling periods, Workday calculates the denominator after first adjusting the period start and end dates. For static periods, Workday uses the period start and end dates to determine the denominator. After determining the period start and end dates, Workday calculates the standard working days in the date range by excluding the days and holidays that you select on the threshold rule.

Time Tracking Calculation Examples

Example: Calculate Double Time on Seventh Consecutive Day

This example illustrates how to set up a consecutive day calculation and a standard overtime calculation to meet specific requirements.

Context

Workers are paid overtime for hours worked on the seventh consecutive day of work in a workweek. They're paid double time if they work more than 8 hours on the seventh consecutive day.

Prerequisites

Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Steps

1. Create a consecutive day calculation that tags all hours worked on the seventh consecutive day as *Overtime*.
    a) Access the Create Time Calculation task.
    b) In the Name field, enter *Seventh Day*.
    c) From the Calculation Type prompt, select *Consecutive Day Calculation*.
    d) Click OK.
    e) In the General Options tab, specify the Criteria:

Field	Value
Consecutive Day Number (up to 9)	*7*
Time Calculation Tags	*Regular*

    f) Specify the Results:

Field	Value
Add Tags	*Overtime* *7th Consecutive Day*
Remove Tags	*Regular*
Time Day Based On	*Calculated Date*

    g) In the Groups tab, add a row to the grid with these values:

Field	Value
Time Calculation Group	*USA - Overtime Calculations*
Effective Date	*Current Snapshot*

    h) Click OK.
2. Access the Maintain Time Calculation Priorities task to assign this calculation priority 055.
3. Click OK and Done.
4. Create a standard overtime calculation that tags double time after 8 hours of work on the seventh consecutive day.
    a) Access the Create Time Calculation task.
    b) In the Name field, enter *Seventh Day Double Time*.
    c) From the Calculation Type prompt, select *Standard Overtime Calculation*.
    d) Click OK.
    e) In the General Options tab, specify the Criteria:

Field	Value
Period	*Daily*
Replace Hours Greater than	*8*
Time Calculation Tags	*7th Consecutive Day*

    f) Specify the Results:

Field	Value
Add Tags	*Double Time*

Field	Value
Remove Tags	*Overtime*

g) In the Groups tab, add a row to the grid with these values:

Field	Value
Time Calculation Group	*USA - Overtime Calculations*
Effective Date	*Current Snapshot*

h) Click OK.

5. Access the Maintain Time Calculation Priorities task to assign this calculation priority 057 so that it executes after the consecutive day calculation.
6. Click OK and Done.

Result

When a worker reports 6 hours of worked time on the seventh consecutive day of work, Workday creates a 6-hour calculated time block tagged with *Overtime* and *7th Consecutive Day*. If the worker reports 11 hours of worked time on the seventh consecutive day of work, Workday creates 2 calculated time blocks:

- An 8-hour block tagged with *Overtime* and *7th Consecutive Day*.
- A 3-hour block tagged with *Double Time* and *7th Consecutive Day*.

Related Information
Tasks
Create Consecutive Day Calculations on page 2736
Create Standard Overtime Calculations on page 2748
Assign Time Calculation Priorities on page 2758

Example: Calculate Location-Based Overtime

This example illustrates how to combine calculated fields and time calculations to support location-based overtime requirements.

Context

Nonresidents working in XYZ State, USA are eligible for XYZ State double time. Workers in XYZ State are paid double time after 12 hours of work in a day, whether they're residents of the state or not.

Prerequisites
Security:

- *Custom Field Management* domain in the System functional area.
- *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Steps

1. Access the Create Calculated Field task to create calculated fields that build on each other. You'll use the final calculated field in this step in the time block conditional calculation.
   a) Create a calculated field that returns a worker's default state.

Field	Value
Field Name	*Worker's Default State for a Time Block*
Business Object	*Time Block*

Field	Value
Function	*Lookup Related Value*

b) Click OK.
c) In the Calculation tab, specify these values:

Field	Value
Lookup Field	*Worker* Select the *Worker* option with the Time Block business object. View the related actions menu to verify the business object associated with a Worker option.
Return Value	*Primary Address - State/Province*

d) Click OK.
e) Click Create Another Calculation.
f) Create a calculated field that returns a worker's default state as of the time block date.

Field	Value
Field Name	*Worker's Default State for a Time Block as of Time Block Date*
Business Object	*Time Block*
Function	*Lookup Value as of Date*

g) Click OK.
h) In the Calculation tab, specify these values:

Field	Value
Source Field	*Worker's Default State for a Time Block*
Effective Date	*Calculated Date*

i) Click OK.
j) Click Create Another Calculation.
k) Create a calculated field that returns the state for the time block if a worker overrides the default state for the time block.

Field	Value
Field Name	*Override State for a Time Block*
Business Object	*Time Block*
Function	*Lookup Related Value*

l) Click OK.
m) In the Calculation tab, specify these values:

Field	Value
Lookup Field	*Location*

Field	Value
Return Value	*Primary Address - State/Province*

n) Click OK.
o) Click Create Another Calculation.
p) Create a calculated field that returns true if a worker's default location is in XYZ State or if a worker specifies the location for the time block as XYZ State.

Field	Value
Field Name	*Time Block Worked in XYZ State*
Business Object	*Time Block*
Function	*True/False Condition*

q) Click OK.
r) In the Calculation tab, create the true/false condition. Add these rows to the grid:

And/Or	(	Field	Operator	Comparison Type	Comparison Value	)
And	*(*	*Override State for a Time Block*	*is blank*			
And		*Worker's Default State for a Time Block as of Time Block Date*	*equal to*	*Value specified in this filter*	*XYZ State*	*)*
Or		*Override State for a Time Block*	*equal to*	*Value specified in this filter*	*XYZ State*	

s) Click OK and Done.

2. Create a time block conditional calculation using the calculated field *Time Block Worked in XYZ State* that you defined in the previous step. This calculation tags all time blocks worked in XYZ State with an *XYZ State* calculation tag.
   a) Access the Create Time Calculation task.
   b) In the Name field, enter *XYZ State Time*.
   c) From the Calculation Type prompt, select *Time Block Conditional Calculation*.
   d) Click OK.
   e) In the Criteria section, from the Time Block Conditions prompt, select *Time Block Worked in XYZ State*.
   f) In the Results section, from the Add Tags prompt, create an *XYZ State* time calculation tag.
   g) In the Groups tab, specify time calculation groups so that all workers are eligible for this calculation, not just XYZ State residents. Add a row to the grid with these values:

Field	Value
Time Calculation Group	*USA - Overtime Calculations*
Effective Date	*Current Snapshot*

   h) Click OK.
3. Access the Maintain Time Calculation Priorities task, and assign this calculation a priority of 080.

4. Click OK and Done.
5. Create an overtime calculation that calculates double time if a worker works more than 12 hours in a day, for both XYZ State residents and nonresidents who worked in XYZ State.
    a) Access the Create Time Calculation task.
    b) In the Name field, enter *XYZ State Double Time*.
    c) From the Calculation Type prompt, select *Standard Overtime Calculation*.
    d) Click OK.
    e) In the General Options tab, specify the Criteria:

Field	Value
Period	*Daily*
Replace Hours Greater than (value)	*12*
Time Calculation Tags	*XYZ State*

    f) Specify the Results:

Field	Value
Add Tags	*Double Time*
Remove Tags	*Regular*
Time Day Based On	*Calculated Date*

    g) In the Groups tab, specify time calculation groups so that all workers are eligible for this calculation, not just XYZ State residents. Add a row to the grid with these values:

Field	Value
Time Calculation Group	*USA - Overtime Calculations*
Effective Date	*Current Snapshot*

    h) Click OK.
6. Access the Maintain Time Calculation Priorities task to assign this calculation priority 085 so that it executes after the time block conditional calculation.
7. Click OK and Done.

Result

When nonresidents work in XYZ State, they must specify which time blocks they worked in XYZ State so that Workday includes the time blocks in the double time calculations.

Related Information
Tasks

Create Standard Overtime Calculations on page 2748
Create Time Block Conditional Calculations on page 2751
Assign Time Calculation Priorities on page 2758

Example: Calculate Minimum Rest Time

This example illustrates how to configure Workday Time Tracking to accommodate minimum-rest laws. This example uses a predictive scheduling configuration and a minimum-rest-time calculation.

Context

At your company in Oregon, state law defines a 10-hour rest period for workers between shifts. When a worker must work before the 10-hour rest period is over, they receive premium pay for the hours worked within the rest period. You also want to ensure that any hours worked during the 3-hour grace period don't qualify for the minimum-rest premium.

Ali works these hours:

In/Out	Time
In	1:00 PM
Out	3:00 PM
In	5:00 PM
Out	10:00 PM

You want to ensure that you pay Ali the minimum-rest premium for hours worked from the end of the grace period to the end of the minimum-rest period.

Prerequisites

- Create a Time Calculation Group named Oregon Calculations. See Create Time Calculation Groups.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Steps

1. Access the Create Predictive Scheduling Configuration task.
2. Enter these values:

Option	Description
Name	*Oregon*
Allowed Out Types	*Out*
Minimum Rest Hours after Last Out (up to 48)	*10*

3. Click OK and Done.
4. Create a minimum rest calculation using the predictive scheduling configuration that you created. The time calculation tags hours worked during the minimum rest threshold with the *Minimum Rest* time calculation tag.
   a) Access the Create Time Calculation task.
   b) In the Name field, enter *Oregon Minimum Rest*.
   c) From the Calculation Type prompt, select *Minimum Rest Calculation*.
   d) Click OK.
   e) In the General Options tab, specify the Criteria:

Field	Value
Predictive Scheduling Configuration	*Oregon*
Minimum Rest Grace Period after Last Out	*3*

   f) Specify the Results:

Field	Value
Add Tags	Create a *Minimum Rest Premium* time calculation tag.

Field	Value
Remove Tags	*Regular*

g) In the Groups tab, add a row to the grid with these values:

Field	Value
Time Calculation Group	*Oregon Calculations*
Effective Date	*Current Snapshot*

h) Click OK.

5. Access the Maintain Time Calculation Priorities task to assign this calculation priority 010.
6. Click OK and Done.

Result

Ali’s second check-in, at 5:00 PM, is during the minimum-rest grace period. On Ali's 5:00-10:00 PM time block, Workday tags only the hours from the end of the grace period to the end of the rest threshold with the *Minimum Rest Premium* calculation tag:

Worked Time	Tags
1:00-3:00 PM	*Regular*
5:00-6:00 PM	*Regular*
6:00-10:00 PM	*Minimum Rest Premium*

Related Information

Tasks

Create Predictive Scheduling Configurations on page 2664
Create Minimum Rest Calculations on page 2740
Assign Time Calculation Priorities on page 2758

Example: Calculate Monthly Overtime

This example illustrates how to configure work schedule calendars and create standard overtime calculations to calculate overtime on a monthly basis.

Context

You need to pay workers in Japan overtime when they work more than 150 hours in a month.

Prerequisites

- Create a time calculation group named Japan Monthly Overtime. See Create Time Calculation Groups on page 2760.
- Security:
  - *Set Up: Calendar* domain in the System functional area.
  - *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Steps

1. Access the Create Work Schedule Calendar task.
   a) In the Name field, enter *Japan - Work Schedule - Hourly*.
   b) In the Time Tracking section, in the Configurable Calculation Period field, select *Month - Starting on Day 1*. Workday calculates overtime over this period.
   c) Click OK and Done.
2. Access the Create Time Calculation task.
3. In the Name field, enter *Monthly Overtime*.
4. From the Calculation Type prompt, select *Standard Overtime Calculation*.
5. Click OK.
6. In the General Options tab, specify the Criteria:

Field	Value
Period	*Configurable Period* This value is based on the period that you selected on the work schedule calendar.
Replace Hours Greater than (value)	*150*
Time Calculation Tags	*Regular*

7. Specify the Results:

Field	Value
Add Tags	Create a *Monthly Overtime* time calculation tag.
Remove Tags	*Regular*
Time Day Based On	*Calculated Date*

8. In the Groups tab, add a row to the grid with these values:

Field	Value
Time Calculation Group	*Japan Monthly Overtime*
Effective Date	*Current Snapshot*

9. Click OK.
10. Access the Maintain Time Calculation Priorities task to assign this calculation priority 910.
11. Click OK and Done.

Result

When a worker who belongs to the *Japan Monthly Overtime* calculation group works more than 150 hours in a month, Workday tags their hours over 150 with the Monthly Overtime calculation tag and calculates the hours as overtime.

Related Information

Tasks

Create Standard Overtime Calculations on page 2748

Assign Time Calculation Priorities on page 2758

Examples

Create Work Schedule Calendars

Example: Calculate Nevada Rolling Overtime

This example illustrates how to create standard overtime calculations to comply with Nevada overtime regulations.

Context

Nevada law requires companies to pay certain groups of workers overtime when they work more than 8 hours in a 24-hour period. You need to create a calculation that tags the appropriate hours as overtime.

Prerequisites

- Create a Time Calculation Group named Nevada Daily OT. See Create Time Calculation Groups.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Steps

1. Access the Create Time Calculation task.
2. In the Name field, enter *Nevada Rolling Overtime*.
3. From Calculation Type prompt, select *Standard Overtime Calculation*.
4. Click OK.
5. In the General Options tab, specify the Criteria.

Field	Value
Period	*Rolling 24 Hours* This setting disables the Include Scheduled Hours check box in the Advanced section.
Rolling 24 Hour Period Begins	*Start of Day*
Replace Hours Greater than (value)	*8* Workday calculates any hours greater than *8* as overtime.
Time Calculation Tags	*Regular* To include *Hours Only* time entries or time off in the overtime calculation, a 24-hour period must begin on that day.

6. Specify the Results.

Field	Value
Add Tags	*Overtime*
Remove Tags	*Regular*

7. In the Groups tab, add a row to the grid with these values:

Field	Value
Time Calculation Group	*Nevada Daily OT*
Effective Date	*Current Snapshot*

8. Click OK.
9. Access the Maintain Time Calculation Priorities task to assign this calculation priority 200.
10. Click OK and Done.

Related Information

Concepts

Concept: Rolling 24-Hour Periods on page 2800

Tasks

Create Standard Overtime Calculations on page 2748
Assign Time Calculation Priorities on page 2758

Example: Calculate the Majority of a Shift

This example illustrates how to configure Workday Time Tracking to create calculations to pay workers appropriately depending on when they work the majority of their shift.

Context

At your company, the majority of a worker's worked hours in a shift falls between 6:00 PM and 6:00 AM. Workers are paid a premium rate for their entire shift (called *Shift 2* in this example).

Prerequisites

- Enable a time shift option on the time entry templates of the workers to whom you want these calculations to apply. See Set Up Time Shift Options on page 2686.
- Security: *Set Up: Time Calculations* domain in the Time Tracking Calculations functional area.

Steps

1. Create a shift differential calculation to tag all hours worked between 6:00 PM and 6:00 AM as *Shift 2*.
    a) Access the Create Time Calculation task.
    b) In the Name field, enter *Shift 2 Hours*.
    c) From the Calculation Type prompt, select *Shift Differential Calculation*.
    d) Click OK.
    e) In the General Options tab, specify the Criteria:

Field	Value
Start Time	*6:00 PM*
End Time	*6:00 AM*

    f) In the Results section, from the Add Tags prompt, create a *Shift 2* time calculation tag.
    g) In the Groups tab, add a row to the grid with these values:

Field	Value
Time Calculation Group	*Full-Time Hourly Worker*
Effective Date	*Current Snapshot*

    h) Click OK.
2. Access the Maintain Time Calculation Priorities task to assign the calculation priority 045.
3. Click OK and Done.
4. Access the Create Calculated Field task to create calculated fields that build on each other. You use the final calculated field created in this step in the time block conditional calculation.
    a) Create a calculated field that returns true if a time block is tagged as *Shift 2*.

Field	Value
Field Name	*Time Block Has Shift 2 Calc Tag*

Field	Value
Business Object	*Time Block*
Function	*True/False Condition*

b) Click OK.

c) In the Calculation tab, create the true/false condition. Add this row to the grid:

And/Or	(	Field	Operator	Comparison Type	Comparison Value	)
And		*Calculation Tags*	*any in the selection list*	*Value specified in this filter*	*Shift 2*	

d) Click OK.

e) Click Create Another Calculation.

f) Create a calculated field that sums all the time blocks in a shift tagged as *Shift 2*.

Field	Value
Field Name	*Total Shift 2 Hours for a Shift*
Business Object	*Time Shift*
Function	*Sum Related Instances*

g) Click OK.

h) In the Calculation tab, specify these values:

Field	Value
Related Field	*Time Blocks for a Time Shift*
Instances where condition is true	*Time Block Has Shift 2 Calc Tag*
Field to Sum	*Calculated Quantity*

i) Click OK.

j) Click Create Another Calculation.

k) Create a calculated field that calculates the percent of time in a shift that is tagged as *Shift 2*.

Field	Value
Field Name	*% of Shift in Shift 2*
Business Object	*Time Shift*
Function	*Arithmetic Calculation*

l) Click OK.

m) In the Calculation tab, from the Field Type prompt, select *Numeric*.

n) Add these rows to the grid:

(	Field	)	Operator			
	Total Shift 2 Hours for a Shift		*/ (Divide)*			
	Total Reported					

(	Field	)	Operator			
	Hours for a Shift					

o) Click OK.
p) Click Create Another Calculation.
q) Create a calculated field that returns true if the majority of a shift was worked in *Shift 2*.

Field	Value
Field Name	*Majority of Shift Worked in Shift 2*
Business Object	*Time Shift*
Function	*True/False Condition*

r) Click OK.
s) In the Calculation tab, create the true/false condition. Add this row to the grid:

And/Or	(	Field	Operator	Comparison Type	Comparison Value	)
And		*% of Shift in Shift 2*	*greater than*	*Value specified in this filter*	*0.5*	

t) Click OK and Done.

5. Use the calculated field, *Majority of Shift Worked in Shift 2*, to create the time block conditional calculation. This calculation tags the entire shift with *Shift 2 Premium* if the majority of the shift was worked in *Shift 2*.
   a) Access the Create Time Calculation task.
   b) In the Name field, enter *Shift 2 Premium Hours*.
   c) For the Calculation Type, select *Time Block Conditional Calculation*.
   d) Click OK.
   e) In the General Options tab, from the Time Shift Conditions prompt, select *Majority of Shift Worked in Shift 2*.
   f) In the Results section, from the Add Tags prompt, create a *Shift 2 Premium* time calculation tag.
   g) In the Groups tab, add a row to the grid with these values:

Field	Value
Time Calculation Group	*Full-Time Hourly Worker*
Effective Date	*Current Snapshot*

   h) Click OK.
6. Access the Maintain Time Calculation Priorities task to assign this calculation priority 050.
7. Click OK and Done.

Result

Workday tags any reported time between 6:00 PM and 6:00 AM as *Shift 2*. If workers work the majority of their shift in *Shift 2*, they receive a *Shift 2 Premium* for their entire shift.

Related Information
Tasks
Assign Time Calculation Priorities on page 2758

Reference

The Next Level: Time Tracking Advanced Concepts
Create Shift Differential Calculations on page 2746
Create Time Block Conditional Calculations on page 2751

Example: Daily Evaluation of Worker Eligibility for Time Calculations

This example illustrates different scenarios on how daily evaluation of worker eligibility for time calculations supports midweek changes in worker eligibility.

Context

Your company has the following time calculation eligibility set up for non-exempt and exempt workers, taking into account when non-exempt workers work overtime:

The Daily Overtime calculation is configured to:

- Create a new time block for daily hours over 8.
- Replace the default Regular calculation tag for the new time block with the Daily Overtime tag.

The Weekly Overtime calculation is configured to:

- Create a new time block for weekly hours over 35.
- Replace the default Regular calculation tag for the new time block with the Weekly Overtime tag.

The day breaker is midnight. When a worker moves from the non-exempt workers to exempt workers time calculation group or the other way around, their eligibility changes and the time calculation snapshots they are eligible for change as well:

Effective Date	Time Calculation Group	Time Calculations
January 1, 1930	Non-exempt workers	• Daily Overtime (OT) > 8 Hours • Weekly OT > 35 Hours
January 1, 1930	Exempt workers	Paid Holiday

Example 1 - A worker is eligible for the same calculation snapshots for the entire week.

Tenant-level setting Run Time Calculation Eligibility Day by Day is not selected.

Day of the Week	Worked Time / Calculated Time Blocks
Monday, April 1	10 hours worked • 8 hours Regular • 2 hours Daily OT
Tuesday, April 2	10 hours worked • 8 hours Regular • 2 hours Daily OT
Wednesday, April 3	10 hours worked • 8 hours Regular • 2 hours Daily OT
Thursday, April 4	10 hours worked • 8 hours Regular • 2 hours Daily OT
Friday, April 5	10 hours worked • 3 hours Regular • 2 hours Daily OT • 5 hours Weekly OT

Day of the Week	Worked Time / Calculated Time Blocks
Saturday, April 6	
Sunday, April 7	
Totals	• Regular: 35 • Daily OT: 10 • Weekly OT: 5

The worker receives daily overtime every day and hits the threshold for weekly overtime on Friday, April 5.

Example 2a: A worker at your organization is promoted and moves from non-exempt to exempt status on April 6.

Tenant-level setting Run Time Calculation Eligibility Day by Day is selected and daily evaluation starts on April 1.

Day of the Week	Worked Time / Calculated Time Blocks
Monday, April 1	10 hours worked • 8 hours Regular • 2 hours Daily OT
Tuesday, April 2	10 hours worked • 8 hours Regular • 2 hours Daily OT
Wednesday, April 3	8 hours worked • 8 hours Regular
Thursday, April 4	8 hours worked • 8 hours Regular
Friday, April 5	8 hours worked • 3 hours Regular • 5 hours Weekly OT
Saturday, April 6 • Exempt status	8 hours worked • 8 hours Regular
Sunday, April 7	
Totals	• Regular: 43 • Daily OT: 4 • Weekly OT: 5

The worker hits the 35 hour weekly overtime threshold before their eligibility changes, the weekly overtime block is applied to Friday.

Example 2b: A worker at your organization is promoted and moves from non-exempt to exempt status on April 5.

Tenant-level setting Run Time Calculation Eligibility Day by Day is selected and daily evaluation starts on April 1.

Day of the Week	Worked Time / Calculated Time Blocks
Monday, April 1	10 hours worked • 8 hours Regular • 2 hours Daily OT
Tuesday, April 2	10 hours worked • 8 hours Regular • 2 hours Daily OT

Day of the Week	Worked Time / Calculated Time Blocks
Wednesday, April 3	6 hours worked • 6 hours Regular
Thursday, April 4	6 hours worked • 6 hours Regular
Friday, April 5 • Exempt status	6 hours worked • 6 hours Regular
Saturday, April 6	
Sunday, April 7	
Totals	• Regular: 34 • Daily OT: 4

The worker does not hit the 35 hour weekly overtime threshold before their eligibility changes.

Example 3 - A worker at your organization changes roles and moves from exempt to non-exempt status on April 6.

Tenant-level setting Run Time Calculation Eligibility Day by Day is selected and daily evaluation starts on April 1.

Day of the Week	Worked Time / Calculated Time Blocks
Monday, April 1	10 hours worked • 10 hours Regular
Tuesday, April 2	10 hours worked • 10 hours Regular
Wednesday, April 3	10 hours worked • 10 hours Regular
Thursday, April 4	10 hours worked • 10 hours Regular
Friday, April 5	
Saturday, April 6 • Non-exempt status	10 hours worked • 2 hours Daily OT • 8 hours Weekly OT
Sunday, April 7	
Totals	• Regular: 40 • Daily OT: 2 • Weekly OT: 8

When the worker gains eligibility to the 35 hourly weekly overtime calculation on Saturday, Workday considers all regular hours in the week and only modifies time blocks for days on which the worker has eligibility to the weekly overtime calculation.

Related Information

Concepts

Concept: Daily Evaluation of Worker Eligibility for Time Calculations on page 2801

Reference

2024R2 Feature Release Note: Effective Date Support for Midweek Changes in Time Calculations

Time Tracking Calculation Concepts

Concept: Time Calculations

Time calculations are rules that Workday uses to generate calculated time blocks from time blocks that workers report. When you create time calculations that are active as of a particular date, each effective-dated configuration is a snapshot of the time calculation. Workday Payroll and third-party applications can use calculated time blocks to pay workers using complex pay rules rather than paying the same rate for all time worked.

Example: When a worker enters 10 hours of worked time for a day, Workday creates a reported time block of 10 hours. Without time calculations, the 10 hours would pass to payroll without specific rules for payment. Adding a time calculation for overtime can split the original 10 hours into 2 calculated time blocks: 1 block for 8 hours of regular time, and another block for 2 hours of overtime so that payroll can pay for time at the appropriate rates.

You can delete a time calculation snapshot as long as it isn't used in calculated time blocks. Workday doesn't recommend deleting time calculation snapshots that belong to a time calculation group snapshot. If a time calculation becomes invalid, remove it from the time calculation group snapshot on the effective date that the calculation becomes invalid. This ensures that time calculation group snapshots with earlier effective dates still have all calculations that were valid at that time. Example: A time calculation becomes invalid on 2025-01-01. Create a new time calculation group snapshot with an effective date of 2025-01-01, and remove the invalid time calculation from it.

Calculation Types

You can configure these types of calculations:

- Accumulated Overtime
- Consecutive Day
- Flextime
- Holiday Time Block Create
- Minimum Daily Hours
- Minimum Rest
- Minimum Weekly Hours
- Override Rate
- Predictive Scheduling
- Schedule Deviation
- Shift Differential
- Standard Overtime
- Time Block Conditional
- Time Block Create

Each calculation type specifies a different set of conditions that must exist to:

- Create new time blocks.
- Add time calculation tags.
- Replace time calculation tags.

You can create more than 1 of each type of calculation. Example: You can create multiple standard overtime calculations, each with different thresholds, or other parameters.

To meet complex time tracking requirements, you can:

- Create your own calculated fields to use in time calculations.
- Use multiple calculation tags as criteria for executing a time calculation.
- Use time block conditional calculations to tag time blocks for use in other time calculations.
- Use time calculation priorities to apply a series of time calculations to time blocks.

Eligibility

Workers are eligible for time calculations through the time calculation group that they belong to. A time calculation group snapshot defines a set of time calculation snapshots. You can assign eligibility rules to workers to specify who is eligible for the group and consequently, that set of calculations.

When you select the Run Time Calculation Eligibility Day by Day check box on the Edit Tenant Setup - HCM task to evaluate worker eligibility for time calculations daily, the evaluation starts on the date you select in the Start Daily Evaluation on Date field. When you select daily evaluation, Workday only applies the calculations for the days on which the worker is eligible, different than the end of week eligibility.

Running Time Calculations

Workday automatically runs time calculations whenever you add or edit a worker's reported or calculated time. You can also:

- Configure your tenant to have Workday automatically run calculations when you approve a worker's time off request by selecting Run Calculations with Time Off Approval on the Edit Tenant Setup - HCM task.
- Manually run time calculations.

When time calculations run, Workday:

- Applies the default calculation tags assigned to the time entry code the worker used to enter time to the original reported time block.
- Generates calculated time blocks.
- Executes time calculations for active snapshots, adding and removing calculation tags from calculated time blocks based on:
  - The employee's eligibility for time calculations.
  - Time calculation priorities.
- Removes temporary calculation tags.
- Stores the resulting calculated time blocks.

Days Evaluated by a Time Calculation

Workday evaluates time blocks for the week, or for a single day in the week, to determine whether to run calculations. Workday evaluates time blocks within a 2-week period for biweekly time calculations. The biweekly calculation start date on the worker's work schedule calendar determines the 2-week period.

Overtime calculations respect the day breaker options defined for a worker's schedule.

Validations

Time calculations don't include Workday-delivered validations. You might have time tracking policies you can't automate with delivered calculation types. You can create validations to alert users that the entered time requires an adjustment.

Example: Performing Overtime Calculations

Scenario: The *Daily Overtime* calculation is configured to:

- Create a new time block for daily hours over 8 that are entered using the time entry code, *Worked Time*.
- Replace the default *Regular* calculation tag for the new time block with the *Overtime* tag.

The day breaker is midnight.

When Raj enters 10 hours of *Worked Time*, from 8:00 AM to 6:00 PM, Workday:

1. Applies the *Regular* calculation tag to the reported time block of 10 hours.
2. Creates a calculated time block for 10 hours tagged as regular.

3. Splits the 10-hour time block into 2 calculated time blocks:
   - 8 hours tagged as *Regular*.
   - 2 hours tagged as *Overtime*.

Pia enters 10 hours of *Worked Time*, from 3:00 PM to 1:00 AM on July 5. In this case, Workday:

1. Applies the *Regular* calculation tag to the reported time block of 10 hours.
2. Creates 2 calculated time blocks tagged as *Regular*: 9 hours for July 5 and 1 hour for July 6.
3. Splits the 9-hour time block into 2 calculated time blocks:
   - 8 hours tagged as *Regular*.
   - 1 hour tagged as *Overtime*.
4. Stores the 3 final calculated time blocks.
   - 8 hours tagged as *Regular* for July 5.
   - 1 hour tagged as *Overtime* for July 5.
   - 1 hour tagged as *Regular* for July 6.

Related Information
Concepts
Steps: Set Up Calculations for Time Tracking on page 2734
Manually Run Time Calculations on page 2763
Create Work Schedule Calendars
Create Time Entry Validations on page 2812
Assign Time Calculation Priorities on page 2758
Reference: Time Calculation Types on page 2765
The Next Level: Time Tracking - Calculated Fields for Time Calculations and Time Entry Validations
2024R1 What's New Post: Effective Date Support in Time Tracking

Concept: Effective Dating for Time Calculations

You can create snapshots of your time calculations and time calculation groups that are active as of particular dates by using effective dating. Each effective-dated configuration is a snapshot of the time calculation or time calculation group.

Effective-dated time calculations support changes in legislation or company policy, ensuring accurate pay for workers. You can still adjust time or run retro payroll on historical periods. Workday uses the correct calculations for the period. Example: As of 2024-09-01, the State of Colorado requires that workers be paid overtime when they work more than 12 hours in a single day. The legislation goes into effect on 2024-09-01. You add an effective date to your overtime calculation to include Colorado employees as of 2024-09-01. When you adjust time or run retro payroll for periods before 2024-09-01, Workday uses the criteria in effect for those periods.

Workday automatically updates time calculations and time calculation groups that were created before the 2024R1 release on 2024-03-09 to have 1 snapshot with an effective date of 1930-01-01. When you edit an existing time calculation or time calculation group, Workday prompts you to edit an existing effective-dated snapshot or create a new effective-dated snapshot. Example: You have a Colorado Overtime time calculation. When you edit that calculation, you see an existing calculation snapshot with an effective date of 1930-01-01. You create a new snapshot with an effective date of 2024-09-01 and update the eligibility rule. You now have 2 snapshots of the same time calculation.

Time calculation effective dates are based on the worker time zone. Example: When you create a new snapshot with an effective date of 2024-03-08, the snapshot takes effect at 12:00 AM CST on 2024-03-08 for workers in the CST time zone.

When you run calculations for a historical time period, you must submit all time blocks for approval before you run payroll to avoid negative payroll results.

To compare configuration changes across snapshots, you can run the All Time Calculation Snapshots and All Time Calculation Group Snapshots reports.

Limitations

- You can't add effective dates to time calculations for statutory holidays in Canada.
- For predictive scheduling and accumulated overtime calculations, you can only add 1 snapshot.
- You can't create new time calculation group snapshots from time calculations on the Edit Time Calculation task.
- You can't use effective dating with iLoad and web services versions older than 42. iLoad templates version 42 and later have new columns to support effective dating.

Effective Dating and Eligibility

If you select the tenant-level Run Time Calculation Eligibility Day by Day setting, Workday evaluates worker eligibility for time calculations starting on the date you select in the Start Daily Evaluation on Date field. For each time calculation with multiple snapshots, Workday uses the snapshot that is current at the beginning of the day and applies the calculation criteria on that snapshot.

If you don’t configure daily evaluation of worker eligibility for time calculations, Workday evaluates time calculation eligibility at the end of the week. For each time calculation with multiple snapshots, Workday uses the snapshot that is current as of the end of the week and applies the calculation criteria on that snapshot to the entire week.

Time Calculation and Time Calculation Group Snapshot Deletion

You can delete effective-dated time calculations and their snapshots on the Delete Time Calculation task. To delete a single snapshot, use the Delete Time Calculation Snapshot task. If you delete a time calculation snapshot that's used in a time block, we recommend rerunning time calculations for that period.

You can delete effective-dated time calculation groups and their snapshots on the Delete Time Calculation Group task. To delete a single snapshot, use the Delete Time Calculation Group Snapshot task.

Copy of an Effective-Dated Snapshot

To create a new effective-dated snapshot with a different date but similar configuration, copy an existing snapshot. To copy effective-dated snapshots, use the View Time Calculation or View Time Calculation Group report.

Example: Add an Effective-Dated Time Calculation

In 2024, your company pays a shift premium between 11:00 PM and 6:00 AM. Starting in 2025, a new policy will come into effect so that workers will receive the premium between 10:00 PM and 6:00 AM. You create a future-dated time calculation with the Create Time Calculation task, and 2025-01-01 as the effective date, along with other necessary configurations.

Example: Add an Effective-Dating Time Calculation Group

Your organization has a predictive scheduling calculation included in the Generic Shifts calculation group. The current eligibility rule for the calculation group is for workers in California. When your organization opens a new store in Colorado on 2024-04-01, workers in Colorado need to be eligible for the predictive scheduling calculation. You create a time calculation group snapshot with the Edit Time Calculation task, and 2024-04-01 as the effective date, along with other necessary configurations.

Related Information

Concepts

2024R1 What's New Post: Effective Date Support in Time Tracking

Tasks

Steps: Set Up Calculations for Time Tracking on page 2734
Create Time Calculation Groups on page 2760

Concept: Time Calculation Tags

What Are Time Calculation Tags?

Time calculation tags identify time blocks so that you can:

- Perform calculations on time blocks.
- Pay time.
- Display time and time off totals on the time entry calendar.
- Include calculated time blocks in time off accrual calculations to accommodate compensatory time off in lieu of overtime.

Workers can see the time calculation tags associated with their calculated time through the time entry calendar.

How Are Time Calculation Tags Assigned to Time Blocks?

When you create a time entry code, such as *Worked Time*, you assign it one or more time calculation tags, such as *Regular*. When an employee enters *Worked Time*, Workday assigns the *Regular* tag to the calculated time blocks. You can also assign calculation tags to time offs in Workday Absence Management so that Workday can tag time off for use in calculations. However, calculation tags only apply to time off while calculations are actually running. Workday doesn't store calculation tags on the time off once calculation processing is complete.

When defining time calculations, identify:

- Which calculation tags time blocks must have to be subject to the calculation.

  Example: The overtime calculation only considers time blocks that have the *Regular* tag.
- Calculation tags to add or remove from calculated time blocks.

  Example: Add the *Overtime* tag to time blocks when a worker exceeds 8 hours in a day.

Considerations for Creating Time Calculation Tags

The number of tags you need depends on how you use them and the complexity of your time tracking policies. Consider how you identify time blocks for time calculations, payroll, totals, and time off accruals. What calculation tags do you want workers to see for calculated time blocks on the time entry calendar? How do calculation tags correspond to earnings?

Example: If workers are eligible for daily overtime and weekly overtime, do you want workers to see daily overtime differentiated from weekly overtime when viewing their calculated time? Are these hours paid with separate earnings? If the answer to either question is yes, create separate tags for daily overtime and weekly overtime.

Also consider whether you want to total calculated time blocks by category, such as productive time and unproductive time. In this case, you might create a calculation tag for each.

Work closely with your payroll administrator to determine which tags you need for payroll.

It's also a good idea to map out the sequence for executing time calculations when deciding how granular to make your tags. The sequence could affect the number of tags a time calculation has to add or remove from time blocks.

A basic set of time reporting tags might include:

- Regular
- Overtime

- Double Time
- Shift 1, 2, and 3
- Holiday

You might need tags for other types of pay or other characteristics of time that affect how you track and pay it, such as:

- Call Out
- Company Meeting
- Premium

Related Information
Tasks
Create Time Calculation Tags on page 2735

Concept: Flextime Bands

Flextime bands enable you to configure flexible work arrangements by creating time bands on work schedule calendars. You can:

- Create separate flextime bands for mandatory and flexible hours.
- Identify categories of worked hours by creating flextime calculations that add or remove calculation tags on flextime bands.

Flextime Band Category	Description
Core	Mandatory hours.
Flex	Flexible hours. All flex hours receive the same time calculation tag.
Morning Flex Evening Flex	Apply different calculation tags to hours entered before and after core hours or for any other time ranges you want to configure.

When you create flextime bands, you can:

- Create multiple bands of each category on the same day.
- Use them with patterns and events.

Flextime bands:

- Apply to ad hoc changes on worker schedules.
- Aren't visible on My Team's Schedule or View My Schedule tasks.
- Can cross midnight and day breakers.
- Can have different start times and end times on different days.
- Can’t be greater than 24 hours.
- Can't overlap.
- Don't apply to worker-specific work schedule calendars that you assigned using the Assign Custom Work Schedule task.

You require your workers to work weekends from noon to 4:00 PM. They must work 8 hours each day, and they can work the other 4 hours anytime between 9:00 AM and 8:00 PM. Configure 3 flextime bands:

Category	Days	Start Time	End Time
Morning Flex	Saturday, Sunday	9:00 AM	12:00 PM
Core	Saturday, Sunday	12:00 PM	4:00 PM
Evening Flex	Saturday, Sunday	4:00 PM	8:00 PM

Related Information

Concepts

2022R2 What's New Post: Flexible Time Bands for Time Calculations

Tasks

Create Flextime Calculations on page 2738

Concept: Rolling 24-Hour Periods

Overtime regulations in Nevada require that you pay certain workers overtime when they work more than 8 hours in a 24-hour period. When you create a standard overtime calculation that accommodates this requirement, Workday starts the period when a worker begins work. Workday ends the period 24 hours later. When a worker works more than 8 hours within the 24-hour period, Workday counts the additional hours as overtime, even if they occur the next day.

Example: A worker starts work at 9:00 AM on Monday. The 24-hour period begins with a check-in at 9:00 AM. They work for 8 hours, then leave for the day. On Tuesday, they start work at 7:00 AM. The 24-hour period doesn't end until 9:00 AM on Tuesday, so any hours they work between 7:00 AM and 9:00 AM count as overtime.

The 24-hour period continues to start at the same time for each subsequent day until the worker has a break in consecutive 24-hour periods. A break occurs if the worker starts work more than 24 hours after the start time of the previous day.

Workday evaluates the previous 14 days to determine when the 24-hour period starts. If a worker works more than 14 days without a break of more than 24 hours, Workday applies the start time of the day exactly 14 days before the current day.

At your company, hourly workers in Nevada are eligible for daily overtime if they work for over 8 hours in a 24-hour period.

You define an overtime calculation that accommodates this requirement. A worker enters time for the week. Workday calculates overtime hours according to the 24-hour period start and end time:

Day	Time Blocks	24-Hour Period Start Time	24-Hour Period End Time	Calculated Overtime Hours	Regular Hours
Monday	8:00 AM-12:00 PM (Meal) 1:00 PM-5:30 PM (Out)	Monday 8:00 AM	Tuesday 8:00 AM	0.5	8
Tuesday	7:00 AM-12:00 PM (Meal) 1:00 PM-5:00 PM (Out)	Tuesday 8:00 AM	Wednesday 8:00 AM	1	8
Wednesday	8:30 AM-12:30 PM (Meal) 1:30 PM-5:30 PM (Out)	Wednesday 8:30 AM (Period Resets)	Thursday 8:30 AM	0	8
Thursday	8:00 AM-12:00 PM (Meal) 1:00 PM-5:00 PM (Out)	Thursday 8:30 AM	Friday 8:30 AM	0.5	7.5
Friday	1:00 PM-6:00 PM (Out)	Friday 1:00 PM	Saturday 1:00 PM	0	5

Day	Time Blocks	24-Hour Period Start Time	24-Hour Period End Time	Calculated Overtime Hours	Regular Hours
Saturday	10:00 PM-2:00 AM (Out)	Saturday 10:00 PM (Period Resets)	Sunday 10:00 PM	0	4

Related Information

Concepts

Example: Calculate Nevada Rolling Overtime on page 2787

Concept: Daily Evaluation of Worker Eligibility for Time Calculations

The tenant-level Run Time Calculation Eligibility Day by Day setting provides you the option to evaluate worker eligibility for time calculations daily, rather than applying end of the week eligibility. This supports midweek changes in worker eligibility. The tenant-level setting includes selecting when you want daily evaluation of eligibility to begin. When you select a date in the middle of the week, daily evaluation applies to the entire week.

When you opt-in to this feature, Workday automatically applies the appropriate time calculation and time calculation group snapshots. Time calculation snapshots will be evaluated daily. This means that override rate changes or other premiums can change midweek without an eligibility change.

For non-daily calculations, Workday evaluates the hours that meet the calculation criteria for the period of the calculation, but only persists changes to the calculated time blocks on days for which the worker is eligible for the time calculation snapshot.

This feature will have an impact on your tenant performance and should be considered based on your business requirements. We recommend that you set up the Country / Country Region prompt on the time calculation groups to limit the performance impact before you opt-in to this feature.

You can run the Time Calculation Debugger report in the alternate state of your tenant-level setting so that you can compare changes in calculation results. For example, when your tenant-level setting is set to daily evaluation, deselect the Evaluate Time Calculation Eligibility Daily check box so that you can review the report output based on end of week eligibility. The options you select when you run the Time Calculation Debugger report don't change your tenant-level setting, and the report output is not persisted.

Reporting

When you select the Run Time Calculation Eligibility Day by Day tenant-level setting, you can identify worker eligibility changes for time calculation and time calculation group snapshots using the Time Calculation Eligibility Changes report. Since we have removed the time-calculation-related columns on the Find Shift Blocks Crossing Weeks with Eligibility Changes and View Shift Blocks Crossing Weeks with Eligibility Changes Results reports, when you enable daily evaluation, you can no longer use them to track time calculation eligibility changes.

Related Information

Concepts

2024R2 Feature Release Note: Effective Date Support for Midweek Changes in Time Calculations

Reference

Reference: Edit Tenant Setup - HCM

Concept: Shift Crossing Weeks with Eligibility Change

Workday supports shifts crossing weeks by applying the correct calculations based on the shift date of the prior week or the calculated date of the current week.

The table below illustrates the calculation processing based on the calculated eligibility setup that you configure with the Run Time Calculation Eligibility Day by Day tenant-level setting on the Edit Tenant Setup - HCM task.

Run Time Calculation Eligibility Day by Day	Calculation Processing
Not selected	The time calculation eligibility continues to be resolved as of the end date of the week. If the effective date of a job change falls in the middle of the week, time calculations that haven't run yet are still derived from the worker's end date of the week.
Selected	Time calculation eligibility is evaluated day by day.

Example: Ben's work schedule calendar has *Sunday* as the start day of week, a midnight day breaker, and *Begin of Shift* shift option on his time entry template. He works a shift that starts on Saturday, 2024-09-14, at 9:00 PM, and ends on Sunday, 2024-09-15, at 6:00 AM.

For the week of 2024-09-08 to 2024-09-14, he is eligible for a Daily Overtime Calculation > 8 Hours, based on the shift date. He changes time calculation group eligibility on 2024-09-15 and becomes eligible for a shift differential calculation from 3:00 AM - 7:00 AM. His time block has a shift date of 2024-09-14 and a calculated date of 2024-09-15. The portion of the time block on 2024-09-15 is tagged with 1 hour of Overtime, respecting the shift date, and 3 hours of Night Premium based on the change in eligibility.

Related Information

Concepts

Concept: Daily Evaluation of Worker Eligibility for Time Calculations on page 2801

2024R2 Feature Release Note: Effective Date Support for Midweek Changes in Time Calculations

Reference

Reference: Edit Tenant Setup - HCM

Concept: Time Calculation Debugger

You can run the Time Calculation Debugger report (secured to the *Process: Time Calculation Debugger Task* domain) to:

- Troubleshoot a worker's time calculations over a period.
- Provide insight into how time calculations are applied to a worker's time.

When you select a date to run the report, Workday defaults the calculation date range based on the Work Week Start Day in the Time Tracking section of the work schedule calendar.

You can also configure the Time Calculation Debugger report to run in the alternate state of your tenant-level setting. This enables you to compare changes in calculation results. When you expand the Evaluate Time Calculation Eligibility Settings section, the Configure When to Evaluate Time Calculation Eligibility check box displays and defaults to your current Run Time Calculation Eligibility Day by Day tenant-level setting on the Edit Tenant Setup – HCM task.

The output of the Time Calculation Debugger report is based on the options you select:

Run Time Calculation Eligibility Day by Day	Configure When to Evaluate Time Calculation Eligibility	Evaluate Time Calculation Eligibility Daily	Output
Selected or *Not Selected*	*Not selected*	Not applicable	The report output is based on the tenant-level setting.
Selected	*Selected*	*Not selected*	The report output is based on end of week eligibility.

Run Time Calculation Eligibility Day by Day	Configure When to Evaluate Time Calculation Eligibility	Evaluate Time Calculation Eligibility Daily	Output
Selected	*Selected*	*Selected*	The report output is based on daily eligibility.

Note: The options you select when you run the Time Calculation Debugger report don't change your tenant-level setting, and the report output is not persisted.

On the output page of the Time Calculation Debugger report, you can view the time calculation details for all the calculations that are applied to the worker's time blocks including time calculation tags. You can also access the Worker's Time Eligibility report or the Time Calculation Eligibility Changes report to further troubleshoot.

Related Information

Concepts

Concept: Daily Evaluation of Worker Eligibility for Time Calculations on page 2801

2024R2 Feature Release Note: Effective Date Support for Midweek Changes in Time Calculations

Reference

Reference: Edit Tenant Setup - HCM

Concept: Calculated Time Offs

Calculated Time Offs and Absence Tables

Workday evaluates absence tables similar to time offs to determine whether to run time calculations. Although absence tables may have start and end times, Workday considers absence tables as hours only. This means that time calculations won't run for calculation types, such as shift differential calculations, when workers enter time off against absence tables, and calculated time off blocks won't be created.

Calculated Time Offs Crossing Midnight

Workers can submit time offs as a single request for a time off that's configured with start and end times when that time off crosses midnight. You can configure this on the time off. See Create Time Offs on page 2294.

A time off that crosses midnight only has a reported block. To create a calculated time block, you need to select the Enable Calculated Time Off check box on the time entry template. See Steps: Set Up Calculated Time Offs on page 2760.

Calculated Time Offs Crossing the Week Breaker

When you submit time, you need to submit the time off for both weeks for the time off to be submitted. As a manager, you'll notice separate tasks for both weeks. You need to approve both in order for the time off to be submitted. Time offs crossing the week breaker can be deleted from either week.

Note: The total reported time off hours displays in 1 of the tasks. The other task will display 0 reported hours even though there are calculated hours to approve.

When you review time, both weeks need to be approved for the time off to be approved. When you review time by week, the time off only displays in the week in which it starts.

When using high-volume time entry with Enter Time for Worker, time offs that cross the week breaker are only reflected in the week in which they start.

When you mass submit time, you need to mass submit for both weeks for the time off to be submitted.

When you adjust calculated time, calculated time offs that cross the week breaker are split based on the day breaker. Only the hours that fall into the date range for the task can be edited. You can navigate to an adjacent week to edit the remaining hours.

Calculated Time Offs and Locked Periods

Time entry, including time offs entered through Time Tracking, are restricted by the lockout date on the time entry period of the period schedule. When the period is locked, users can't edit, or enter new time blocks or time offs unless the user has access to the *Time Tracking: Exempt from Lockout* domain.

Time offs entered through Absence don't have this restriction. When you use Absence to enter a time off that falls into a locked time entry period, and the Enable Calculated Time Off option is selected on the time entry template, you need to rerun time calculations to get the correct calculated time off.

Shift Date for Calculated Time Offs

Calculated time off blocks receive a shift date when advanced shift is configured on the time entry template. When advanced shift is configured, the daily totals on the time entry calendar reflect the shift date. Time calculations that reference shift date also use this for calculated time offs.

A time shift can be defined with either:

- Only time worked.
- Only time off.
- Both.

Reported time offs don't have a shift date and aren't counted as part of a shift.

Reported time off blocks that cross midnight use the start date of the time off as the reported date.

Related Information
Concepts
2025R2 Feature Release Note: Calculated Time Offs Crossing Midnight
2025R2 Feature Release Note: Updates to Calculated Time Offs

Time Attestations

Setup Considerations: Time Attestations

You can use this topic to help make decisions when planning your configuration and use of time attestations. 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

Time attestations are questionnaires that workers answer about their meals and breaks when they check out at the end of their shift. Workday can also generate attestations when workers check back in from a meal or break. After workers submit their attestation, you can report on their responses.

Business Benefits

Attestations make it easier for you to:

- Determine if workers are complying with company, state, or federal meal and break policies and regulations.

- Gather attestation responses without the need for managers to follow up with workers after the fact or outside Workday.

Use Cases

- A worker missed their scheduled meal. When they check out at the end of their shift, they can indicate whether they waive their meal. They can then add a comment explaining why they missed it.
- A worker works more than 6 hours without taking a break. When they check out at the end of their shift, Workday prompts them to explain why they exceeded their allotted time between breaks.
- A worker returns to work early from their meal. Workday prevents them from checking back in to work until the full duration of their meal is complete.

Questions to Consider

Questions	Considerations
Do you need to ensure that employees are taking their meals, breaks, or both?	You can create separate attestation rules for meal violations and break violations.
Do you need to warn workers when checking back in to work if their meal or break was too short? Do you need to prevent them from logging back in?	You can set up a critical validation that will prevent workers from checking back in to work when they don't take a long enough meal or break. You can also create warning validations that merely warn the worker rather than preventing them from checking back in.
Do you need to enable employees to waive their meals?	When you create attestation prompts and responses, you can indicate that certain responses are meal waivers.
Do you need to pay workers for meals they miss, but don't waive?	You can use Time Block Create calculations to generate penalty time blocks for workers who miss their meal, but don’t waive it.
Do you need to generate a questionnaire that displays at the end of a shift, but is unrelated to meals or breaks?	You can create a condition rule for use in end of shift attestations. When the condition is met, Workday displays the attestation questions you configured. If you use a custom condition rule, don't use a meal break rule set.

Recommendations

Create a custom report that managers can use to view workers' violations, attestation responses, and comments.

Requirements

- Time attestations are only available for the check-in and check-out time entry method.

Limitations

- This feature isn’t available for use with third-party time clocks.
- You can only generate meal length or break length validations when workers use the Out types of *Meal* or *Break*. The validation won't trigger for the Out type of *Out*.
- This feature isn't compatible with enabling workers to edit their check-in and check-out times.

Tenant Setup

No impact.

Security

Consider these domains in the Time Tracking functional area:

Domain	Considerations
Reports: Time Tracking	Configure to report on workers' meal and break violations, attestation responses, and comments.
Set Up: Time Tracking	Configure to set up attestations.
Worker Data: Time Calendar	Configure to view time blocks that have violations.

Business Processes

No impact.

Reporting

No impact.

Integrations

No impact.

Connections and Touchpoints

Features	Considerations
Time Calculations	You can use Time Block Create calculations to generate a penalty time block for workers who work through their meal or break.
Payroll	Set up Payroll so that workers are paid for additional time worked during their meal or break.

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 End of Shift Time Attestations

Prerequisites

- Create time entry templates.

  See Steps: Create Time Entry Templates .
- Enable Standard Mobile Check-In.

  See Steps: Enable Time Tracking for Mobile .
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

You can configure time attestation questionnaires that workers must complete at the end of their shifts to determine compliance with meal, break, or other policies. You base the questionnaire on a meal break rule set or on a time attestation condition rule. You can only configure this feature for workers who use the check-in and check-out time entry method on desktop or mobile devices. Validations for meals and breaks run only when workers check out for meals and breaks.

Steps

1. Access the Maintain Time Attestation Prompts and Responses task.

   Configure questions and answers that you can use in time attestation questionnaires. Complete the Time Attestation Prompts tab:

Option	Description
Require Comments	Select the check box to require workers to enter a comment along with their response to this prompt.
Description	Describe the prompt. Workday only displays the Description field to administrators.

   As you complete the Time Attestation Responses tab, consider:

Option	Description
Require Comments	Select the check box to require workers to enter a comment when they select this response.
Is Waiver	Select the check box to mark the response as a waiver.
Description	Describe the response. Workday only displays the Description field to administrators.

2. Create Rules for Meals and Breaks on page 2810.
3. (Optional) Access the Create Time Attestation Condition Rule task.

   Create condition rules that workers must meet to generate attestation requests. The time attestation condition rules use Workday-delivered, worker-level conditions in the Source External Field or Condition Rule prompt.
4. Access the Create Time Attestation Rule task.

   Select End of Shift Attestation. Complete the task:

Option	Description
Time Attestation Condition Rule	Select a time attestation condition rule when you don't want to base attestations on meal and break rule sets. Use condition rules to capture attestation responses to ensure that legal and contractual requirements are being met. Example: You want to confirm that workers weren't injured during their shifts.
Prompt Order	Configure the order in which Workday displays attestation prompts to workers.
Violations	Select the violations of the meal break rule set that generate the attestation request. When you select a time attestation condition rule rather than meal break rule sets, you don't need to select violations.

Option	Description
	You can select *Always Show* to configure an attestation that always displays, even when there are no violations.
Prompt	Select a prompt that Workday displays to the worker when: • Their shift meets the conditions for the rules that you configured. • Their shift includes one or more of the violations that you configured.
Additional Prompt Additional Response	You can configure an additional level of prompts and responses based on workers' responses.

5. Access the Edit Time Entry Template task.

   On the Noneffective-Dated tab, expand the Attestations section.

   a) (Optional) Select a Meal Break Rule Set to apply to the time entry template.

      Use a meal break rule set to base attestations on meals and breaks. You don't need to select a meal beak rule set when you configure a condition rule on the time attestation rule.
   b) In the End of Shift Attestations grid, add a row for each attestation rule you want to apply to workers with this time entry template.

Next Steps

You can create penalty time blocks for workers who waive or don't take their required meals or breaks. Create custom fields using these report fields on the Time Shift business object and use these custom fields in time block create calculations:

- Has Break Violations (Attestations)
- Has Conditional Violations (Attestations)
- Has Meal Violations (Attestations)
- Has Meal or Break Violations (Attestations)

Related Information
Concepts
The Next Level: Time Attestations

Steps: Set Up Meal and Break Validations

Prerequisites

- Create time entry templates.

  See Steps: Create Time Entry Templates .
- Enable Standard Mobile Check-In.

  See Steps: Enable Time Tracking for Mobile .
- Security: These domains in the Time Tracking functional area:
  - *Reports: Time Tracking*
  - *Set Up: Time Tracking*
  - *Worker Data: Time Calendar*

Context

You can comply with labor regulations by configuring validations that display when workers check in early from a meal or break, preventing them from checking in until the meal or break is complete. This feature is only available for workers who use the check-in and check-out time entry method on desktop or mobile devices.

Steps

1. Access the Maintain Time Attestation Prompts and Responses task.

   Configure a bank of questions and answers that you can use in meal and break validations.

   As you complete the Time Attestation Prompts tab, consider:

Option	Description
Prompt Text	Configure a question that Workday displays when workers check in from their meal or break. Example: Are you sure you want to check in early?
Description	Workday only displays the Description field to administrators.

   As you complete the Time Attestation Responses tab, consider:

Option	Description
Is Waiver	Select the check box to mark the response as a waiver.
Require Comments	Requires workers to enter a comment when they select this response.

   Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.
2. Access the Create Time Attestation Rule task and select Meal Length.

   Selecting Meal Length will also give you the option to configure validations for breaks.

   As you complete the Rule Definition section, consider:

Option	Description
Out Type	Select the out type that triggers the validation.
Duration in Minutes	Define the length of the meal or break. Workday displays the validation when the worker tries to check in before the full duration of the meal or break is met.
Severity Level	Select one of these severity levels: • *Critical*: Prevents the worker from checking in until their meal or break has met the duration of time. • *Warning - Reason not Required*: Workday displays a warning but allows workers to check in. • *Warning - Reason Required*: Workday displays a warning and requires workers

Option	Description
	to enter a reason before allowing them to check in.
Show time in prompt	When you select this check box, Workday displays the number of minutes remaining in the worker's meal or break.

Security: *Set Up: Time Tracking* in the Time Tracking functional area.

3. Access 1 of these tasks to apply the meal break validation to a time entry template:
   - Create Time Entry Template
   - Edit Time Entry Template

   a) On the Noneffective-Dated tab, expand the Attestations section.
   b) Select the meal or break rule you created from the Meal Length Rule field or the Break Length Rule field.

   Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Next Steps

(Optional) Create end of shift time attestations.

Related Information
Concepts
The Next Level: Time Attestations

Create Rules for Meals and Breaks

Prerequisites

Security: Either of these domains:

- *Set Up: Time Tracking* domain in the Time Tracking functional area.
- *Set Up: Scheduling: High Level Scheduling Settings* in the Workday Scheduling functional area.

Context

You can define rules for the number, length, and placement of meals and breaks within a shift to comply with legal or company regulations. You can then use the rules when configuring time attestations.

Steps

1. Access the Create Meal Break Rule Set task.
2. Add a row and enter details related to the length of the shift.
3. As you complete the Meal and Break Details, consider:

Option	Description
Meal Order Break Order	You can configure the order of meals and breaks within a shift.
Length (Minutes)	Enter the length of the meal or break.
Waiver Allowed	Select when your company policies allow the worker to waive their meal.

Option	Description
Rule	Select a placement rule that determines when the meal or break must occur within the shift. If you're using Workday Scheduling, we recommend you create meal placement rules that provide for 60 minutes of worked time and the placement of a break before the first meal. Example: When breaks are at least 15 minutes long, and a break begins at least 1 hour after the beginning of the shift, place the meal at least 2.25 hours after the beginning of the shift.
Hours	The number of hours that correspond to the placement rule you select.

Note: When you create placement rules that don't allow time for meals or breaks, managers receive an error message when they try to create schedules. Example: You create a rule for an 8-hour shift. The rule requires 1 meal that must be at least 4 hours after the beginning of the shift and at least 4 hours before the end of the shift. Workday enables you to create the rule, but the rule doesn't allow for the placement of the meal. When you use this rule in Workday Scheduling, Workday creates the schedule and displays a message warning about the missing meal.

Example

Workers must receive 2 15-minute breaks and 1 30-minute meal when they work between 8 and 10 hours in a shift. You want to configure:

- The first break to occur after the first 2 hours of the shift.
- The second break to occur before the last 2 hours of the shift.
- The meal to be at least 4 hours after the beginning of the shift.

You also want to enable workers to waive their meal.

1. Enter these shift values:

Field	Value
If Shift Is	*greater than*
Length (Hours)	*8*
And If Shift Is	*less than*
Length (Hours)	*10*

2. Select Meal and Break Details, and enter these meal values:

Field	Value
Length (Minutes)	*30*
Waiver Allowed	*Yes*
Rule	*Begins At Least X Hours After Beginning of Shift*
Hours	*4*

3. Add a row to the breaks grid, and enter these values for the first break:

Field	Value
Length (Minutes)	*15*
Rule	*Begins At Least X Hours After Beginning of Shift*
Hours	*2*

4. Add a second break row, and enter these values:

Field	Value
Length (Minutes)	*15*
Rule	*Begins At Least X Hours Before End of Shift*
Hours	*2*

Next Steps

Create end of shift time attestations.

Time Entry Validations

Create Time Entry Validations

Prerequisites

Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

Create validations to:

- Warn workers when entering, or prevent workers from submitting, invalid time entries.
- Alert reviewers to conditions that need more careful review.

You can also organize validations into groups so that Workday applies them to a more narrow group of workers. Grouping subsets of time entry validations improves the performance of tasks that check for validations.

Steps

1. Access the Maintain Time Entry Validations report.
2. Click the New Validation button for the severity of the validation that you need:
    - *Critical* errors prevent workers from submitting time entries.
    - *Warning* validations display to workers and approvers, but don't prevent time from being submitted or approved.
3. Enter a Description of the error or warning.

    Workday uses the description as the error or warning message if you don't enter custom validation text.

    As a best practice, use the Description field to explain the conditions that trigger the message. Create custom validation text for the message that workers see.

4. (Optional) Assign the validation a Category.

   Assigning a category makes it easier for you to find the rule later. You can use the Maintain Condition Rule Categories task to add or delete categories.
5. (Optional) To copy an existing validation and modify it, select the validation in the Copy Condition from Rule field.
6. For Rule Conditions, describe the conditions that must be met to generate the error or warning.

   You can reference Workday-delivered conditions, as well as your own custom calculated fields, in the Source External Field or Condition Rule field.

   Build all validation conditions in reference to one of these business objects:

   - *Time Block*
   - *Time Day*
   - *Time Month*
   - *Time Shift*
   - *Time Week*
   - *Worker*

   All the error conditions that make up a validation rule should reference the same Time Tracking business object. Example: Don't reference both the *Time Day* and *Time Week* business objects in separate conditions in a single validation rule. If a validation includes conditions based on different business objects, it will fail to generate a warning or error. Alternatively, you can separate error conditions into different validation rules.
7. Click OK.
8. (Optional) Access the Create Time Entry Validation Group task. On the Time Entry Validations tab, select the validations to include in this group.
9. (Optional) On the Eligibility tab, select one or more time entry template effective dates to include in the validation group.

   When a worker is assigned to a time entry template with validation groups, but the worker isn't eligible for any of the groups, Workday only runs ungrouped validations for that worker.
10. (Optional) On the Optional Filters tab, select 1 or more values from the Country / Country Region field.
11. (Optional) To add custom validation text, select Validation > Configure Validation Message from the related actions menu of a validation.

    Your message can include static text as well as dynamic values from report fields and calculated fields.

Result

When workers create a time entry that meets the conditions for the validation, they receive a warning or error message. If the workers receive an error message, they can't submit the invalid time entry until it's resolved. Managers and other approvers see any warnings in the time entries that they receive for review.

Example

Issue a warning when workers enter more than 8 hours for a day.	1. Access the Maintain Time Entry Validations report. 2. Click New Validation next to Warning. 3. In the Description field, enter: *More than 8 hours are reported for the day*. 4. (Optional) Select *Time Tracking* as the Category.

5. Enter these values:

Field	Value
Source External Field or Condition Rule	*Total Reported Hours for a Day*
Relational Operator	*greater than*
Comparison Type	*Value specified in this filter*
Comparison Value	*8*

Prevent workers from entering compensatory time when they haven't worked at least 40 hours in a week.

1. Access the Maintain Time Entry Validations report.
2. Click New Validation next to Critical.
3. In the Description field, enter: *Comp time is not allowed when reported hours are less than 40.*
4. Enter these values:

Field	Value
Source External Field or Condition Rule	*Total Reported Hours for a Week*
Relational Operator	*less than*
Comparison Type	*Value specified in this filter*
Comparison Value	*40*

Prevent workers from submitting time on days when they're on leave of absence.

1. Access the Maintain Time Entry Validations report.
2. Click New Validation next to Critical.
3. In the Description field, enter: *You can't enter time if already on leave on the same day.*
4. Add a row with these values:

Field	Value
And/Or	*And*
Source External Field or Condition Rule	*Total Reported Hours for a Day*
Relational Operator	*is greater than*
Comparison Type	*Value specified in this filter*
Comparison Value	*0*

5.

Field	Value
And/Or	*And*

Field	Value
Source External Field or Condition Rule	*Leaves for a Day*
Comparison Type	*Value specified in this filter*
Relational Operator	*is not empty*

Related Information

Concepts

Create Calculated Fields

The Next Level: Calculated Fields for Time Calculations and Time Entry Validations

The Next Level: Time Tracking: Performance Best Practices

Concept: Time Entry Validations

What Are Time Entry Validations?

Time entry validations are warnings or errors that prevent workers from entering or submitting invalid time entries. During time entry, Workday runs validations after time calculations when a worker clicks OK to enter time. Validations help workers catch time entry errors before you run payroll. They can also be useful for prompting unique time entry policies not supported by time calculation templates.

Example: If managers only pay overtime when certain conditions are met, you can configure a validation message to notify employees and reviewers that a manual adjustment is required.

You can customize your validation messages by using text and dynamic values from report fields and calculated fields. Example: Your messages can include dates and worker names.

Validation Rules

You can create validations by building rules that describe the conditions necessary to generate an error or warning. You can use eligibility rules in validations, such as to create a validation for a certain population of workers. You can also build rules based on calculated fields you create or using Workday-delivered report fields based on these business objects:

- Time Block: Validate individual time blocks.
- Time Shift: Validate a group of consecutive time blocks.
- Time Day: Validate multiple time blocks entered for the same day.
- Time Week: Validate multiple time blocks in the same week.
- Time Month: Validate multiple time blocks in the same month.
- Worker.

The correct business object to reference in a validation condition depends on the type of information you want to evaluate. Examples:

- To generate an error when employees work over 12 hours in a day, you reference the *Time Day* business object in the condition rule.
- To generate a warning when employees work over 50 hours in a week, you reference the *Time Week* business object in the condition rule.
- You can use the *Leaves for a Day* report field on the *Time Day* business object in time-entry validations to prevent workers from submitting time on days when they're on leave of absence.

All the error conditions that make up a validation rule should reference the same Time Tracking business object. Example: Don't reference both the *Time Day* and *Time Week* business objects in separate conditions in a single validation rule. If a validation includes conditions based on different business objects, it will fail to generate a warning or error. Alternatively, you can separate error conditions into different validation rules.

Restricting Validations to Certain Workers

To create a validation for a certain population of workers, include eligibility rules within a validation condition. You can even reference eligibility rules created for other purposes.

You can also group validations by country using time entry validation groups so that you can apply them to a more narrow group of workers. Grouping subsets of validations improves how tasks that check for time entry validations perform. For workers eligible for a time entry validation group, Workday runs only the validations in that group. Workday runs all ungrouped validations for workers who aren't eligible for a time entry validation group.

When Does Workday Run Validations?

Workday runs validations at different points in the time entry process, depending on the time entry method and the type of validation. Workday runs business process validations when a worker submits time. Workday runs custom validations that you create using the Maintain Time Entry Validations task at different points based on the time entry method:

- High-Volume Time Entry and Enter Time by Week validate time during time entry, therefore workers can't save time entries with critical validations.
- All other time entry methods validate time when calculations run, and prevent submission of time entries with critical validations.

Concept: Incomplete Time Blocks

When workers save a time entry without an out time, Workday creates an incomplete time block. Workday doesn't include incomplete time blocks in time calculations.

You can create time entry validations to remind workers to complete their time blocks.

You can prevent workers from submitting incomplete time blocks by selecting Prevent Submission of Incomplete Time Blocks on time entry templates.

You can configure the Out field as optional on time entry templates so that workers can enter time at the beginning of their shift without needing to estimate an out time. This gives workers more flexibility when entering time and reduces the need to manually correct time entries. When you enable optional out times on time entry templates, Workday doesn't require workers to enter an out time on these time entry methods:

- Enter Time by Week
- High-volume time entry
- Micro-edit
- Quick Add

You can prevent workers from submitting incomplete time blocks by selecting Prevent Submission of Incomplete Time Blocks on time entry templates.

You can also create reports to identify incomplete time blocks before payroll processing. You can use these reporting items when creating validations or custom reports:

- Incomplete Time Blocks report data source (RDS).
- Incomplete Time Blocks for a Day report field on the Time Day business object.
- Incomplete Time Blocks for a Week report field on the Time Week business object.

Related Information
Concepts
Steps: Create Time Entry Templates on page 2672

Example: Validate Holiday Time Entry

This example shows you how to create a time entry validation that references different *business objects*.

Context

The *Holiday* time entry code should only be used when workers enter time for holidays. You need to create a validation that prevents workers from entering *Holiday* time for non-holiday days.

This validation needs to reference report fields based on different business objects. Because the rule conditions on the validations must all reference fields on the same primary business object, you need to create a lookup related value calculated field to reference the field on the other business object.

Prerequisites

- Create a holiday calendar.
- Create a time entry code called *Holiday*.
- Security:
  - *Set Up: Time Tracking* domain in the Time Tracking functional area.
  - *Custom Field Management* domain in the System functional area.

Steps

1. Create a lookup related value calculated field that references the Is Holiday report field from the Time Day business object.
   a) Access the Create Calculated Field task.
   b) As you complete the task, consider:

Field	Notes
Field Name	*Time Day is Holiday*
Business Object	*Time Block*
Function	*Lookup Related Value*
Lookup Field	*Time Day for a Time Block*
Return Value	*Is Holiday*

2. Create the time entry validation.
   a) Access the Maintain Time Entry Validations report.
   b) Click New Validation, next to Critical.
   c) In the Description field, enter: *Holiday Time Entry*.
   d) Define the Rule Conditions.

   As you complete the task, consider:

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	*Time Entry Code*	*in the selection list*	*Value specified in this filter*	*Holiday*
And	*Time Day is Holiday*	*equal to*	*Value specified in this filter*	Leave the check box blank.

3. Add a validation message.
    a) Access the Maintain Time Entry Validations report.
    b) Select Validation > Configure Validation Message from the related actions menu of the *Holiday Time Entry* validation.
    c) As you complete the task, consider:

Text/External Field	Value
Text	"
External Field	*Time Entry Code*
Text	" can only be used for holidays. Select a different time entry code for the time block on
External Field	*Formatted Calendar Date for a Time Block*

Result

When a worker attempts to enter time using the *Holiday* time entry code on a day that is not a holiday (example: 2014-10-27), Workday displays this error message: *"Holiday" can only be used for holidays. Select a different time entry code for the time block on 2014-10-27*.

Period Schedules

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. 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.	Enable you to create and manage period schedules for payroll.

Domains	Considerations
• *Set Up: Payroll Interface* in the Payroll Interface functional area.	
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.
Payroll accounting	Workday creates forward accruals when a pay period spans multiple accounting reporting periods.

Features	Considerations
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 2822

Set Up Payroll and Time Tracking Period Schedules

Create Period Schedules for Time Off on page 2338

Create or Edit Period Schedule for Payroll Interface

Set Up Period Schedules for Time Tracking

Prerequisites

If using Workday Payroll and Time Tracking, determine whether to create shared period schedules.

Security:

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

(Optional) If you're using Workday Payroll (or third-party payroll systems) and Time Tracking to create shared period schedules:

- *Set Up: Payroll Interface* domain in the Payroll Interface functional area.
- *Set Up: Payroll - Pay Group Specific* domain in the Core Payroll area.

Context

Create period schedules to define consecutive periods, such as weekly or monthly, for Time Tracking.

This topic describes how to manually set up period schedules for Time Tracking. You can also import period schedules from a spreadsheet using Workday's Enterprise Interface Builder (EIB).

Steps

1. Access the Create Period Schedule task.

2. Define the schedule:

Option	Description
Frequency	Examples: *Weekly*, *Bi-weekly*, or *Monthly*
Usage	Select *Time Tracking*.

3. Add a row for the first period in the schedule and enter the Period Start Date and Period End Date.
4. Specify the dates available for time entry.

   As you complete the task, consider:

Option	Description
Open Time Entry	The date and time that workers can begin entering time for the period. Leave empty if there are no restrictions. You can only run calculations on an open period.
Lock Time Entry	The date and time after which workers can no longer enter time or change time entries for the period. As a best practice, lock the period for payroll processing. You can make payroll administrators and other users exempt from the lockout so that they can make last-minute changes to time blocks during the initial lockout period. Exempt users must belong to a user-based or role-based security group associated with the *Time Tracking: Exempt from Lockout* domain.
Unlock for Adjustments	Select to unlock the period after payroll is complete so that you can enter and correct time for the period using either: • Workday Payroll retro pay calculations to automatically process corrections. • Manual adjustments.
Close Time Entry	The final close date and time for the period. Prevents all users from making additional time entries and corrections for the time period. When you select the Allow Project Transfer in Closed Periods check box on the Set Up Project Billing Configuration task, users can transfer project time blocks in closed time entry periods. Workday recommends that you select a date that is no more than 3 months after the period end date.

   Note: Period schedules always open, lock, unlock, and close in Pacific time.
5. Click OK.

6. Link time periods to pay periods and define eligibility for the time period schedule:
    a) From the related actions menu of the period schedule, select Period Schedule > Edit.
    b) Click the expand icon for the Time Tracking section.
    c) Select the corresponding pay period schedule in the Link to Payroll Period Schedule field.
    d) For Worker Eligibility, select all conditions workers must meet to have the schedule assigned.

        You can select from rules created with the Create Time Tracking Eligibility Rules task. Workers should be eligible for 1 time period schedule only. Review the Audit - Workers with Multiple Time Period Schedules report to identify workers who are eligible for more than 1 time period schedule. As a best practice, define eligibility criteria that match the guidelines you use to assign employees to pay groups.
    e) In the Periods grid, select the pay period that corresponds to each time period in the Link to Payroll Period field.

        The pay period determines the dates for which to pull time into payroll.
7. Define which workers are eligible for the period schedule for Time Tracking:
    a) From the related actions menu of the period schedule name, select Period Schedule > Edit.
    b) Click the expand icon for the Time Tracking section.
    c) For Worker Eligibility, select all conditions workers must meet to have the schedule assigned. Workers must meet all the conditions you define here to be eligible for the schedule.

        You can select from rules created with the Create Time Tracking Eligibility Rules task.

Result

When you save the period schedule, the Period Number column displays the sequential number assigned to each period that has a payment date in the same calendar year.

Next Steps

- Review the Audit - Workers with Multiple Time Period Schedules report for workers who meet eligibility requirements for more than 1 time period schedule.

    As a best practice, run this report periodically to ensure that workers have no more than 1 time period schedule.
- Use the Edit Period Schedule task, as needed, to update the period schedule.
- You can extend period schedules for up to 2 years using the Generate Period Schedule Periods task.

Related Information

Concepts

The Next Level: Time Tracking Configuration

2025R1 Feature Release Note: Transfer Project Time Blocks within Closed Time Entry Periods

Tasks

Create Period Schedules for Time Off on page 2338

Create Worker Eligibility Rules for Time Tracking on page 2826

Set Up Project Billing Configurations

Concept: Period Schedules for Time Tracking

What Is a Time Period Schedule?

The time period schedule, in combination with the pay period schedule, determines when employees receive pay for time worked. It defines:

- The dates that are open for time entry.

    You can set lock dates to prevent employees from entering time while payroll is being processed.

- Which time entries (dates) to load for a pay period.

To enter time, an employee must have a time period schedule assigned.

Time period schedules don't determine the start and end dates of an employee's work week. By default, the work week begins on Sunday, unless the employee's work schedule specifies a different start date.

Time period start and end dates don't have to be the same as the pay period start and end dates. In addition, you can map multiple time periods to a single pay period. Example: You could map multiple weekly time periods to a semi-monthly pay period.

Considerations for Defining Period Schedules

How you configure period schedules depends on your payroll practices:

Time period and pay period dates match.	If you pay employees for time worked on the same dates covered by the pay period, Workday Payroll and Time Tracking can share the same period schedule. This scenario can be used to pay all time in arrears, where employees are paid all time worked several days after they've worked. Scenario: • The pay period is 2019-01-01 to 2019-01-14. • The payment date is 2019-01-21. • When you run payroll for 2019-01-01 to 2019-01-14, you want to pay time worked for the same dates. Solution: Create a period schedule that has a Usage of both *Payroll* and *Time Tracking*. Best practice: If weekly time periods align with weekly pay periods, create a shared period schedule that also coincides with the work schedule.
Time period and pay period dates don't match.	Use this method when regular time is paid through Payroll and non-regular time is pulled from Time Tracking on a lag. You can use this method to pay regular time current and non-regular time in arrears. Note: When you pay time on a lag, the payroll administrator must use the Run Retro Pay Calculation task before running payroll each period. This enables Workday Payroll to pay time for days outside the current pay period being processed. Scenario: • The payroll period is 2019-11-16 to 2019-11-30. • The pay date is 2019-11-30. • When you run payroll for this period, you want to pay time worked from 2019-11-11 to 2019-11-24 (a 2-week period). • You want to define weekly time periods so that you can lock out time periods at the end of each week to better enforce time entry.

Solution:

- Create a pay period schedule with a Usage of *Payroll*.
- Create a separate time period schedule with a Usage of *Time Tracking*.
- Link the period schedules by mapping:
  - The time period schedule to a pay period schedule.
  - Each time period to the corresponding pay period.

    Example: Map both the 2019-11-11 to 2019-11-17 and the 2019-11-18 to 2019-11-24 time periods to the 2019-11-16 to 2019-11-30 pay period.

How Are Period Schedules Assigned to Workers?

- Assign time period schedules to workers by selecting worker eligibility rules when defining time period schedules.
- Assign payroll period schedules to workers by linking period schedules to pay groups.

Related Information
Concepts
Concept: How Payroll Processes Calculated Time on page 2833
Tasks
Steps: Set Up Time Tracking on page 2643

Worker Eligibility for Time Tracking

Create Worker Eligibility Rules for Time Tracking

Prerequisites

Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

To define worker eligibility, create rules you can assign to these Time Tracking components:

- Time code groups.
- Time entry templates.
- Time calculation groups.
- Time period schedules.

Workday provides many fields based on the *Worker* business object that you can reference in eligibility rules. For position-specific data, delivered fields on the *Worker* object usually reference a worker's primary position. To handle workers with multiple positions, you can either:

- Define conditions on the *Worker* object that reference all of a worker's positions.
- Define position-specific eligibility on the *Worker* object using a calculated field to extract a field from the *Position* object.

When you create eligibility rules for time code groups, you can also define position-specific eligibility on the *Position* object.

You can also create your own calculated fields to use in eligibility rules.

Steps

1. Access the Create Time Tracking Eligibility Rules task.
2. For the Description, enter the rule name.
3. In the Source External Field or Condition Rule, select a report field or calculated field.

   The type of report field or calculated field determines available options. Rules that reference fields based on the *Position* business object can only be used for determining eligibility for time code groups.
4. Select a Relational Operator.
5. For Comparison Type, specify whether to compare the source to another field or to a value you enter.
6. For Comparison Value, select a comparison field or enter the value to compare to the source.
7. Click + to add a row for another statement.
8. Use the arrows in the Order column to control the processing order for the statements.
9. When 2 or more logical statements exist, set the *And* or *Or* option at the beginning of each statement. This option controls how Workday uses the statement with the preceding line.
   - All conditions in an expression connected by *And* must be true for the expression to be true.
   - At least one of any of the conditions in an expression connected by *Or* must be true for the expression to be true.
10. Use the parentheses columns when there are 3 or more logical statements and a combination of *And*s and *Or*s.

    Example: To say (a and b) or c:
    - Use the opening parenthesis at the beginning of statement a.
    - *And* before statement b and a closing parenthesis at the end of statement b.
    - *Or* at the beginning of statement c.

Result

You can review the rule using the View Time Tracking Eligibility Rule report and assign it to the various Time Tracking components.

Example

To identify the set of time entry codes available to hourly workers in the U.S., create an eligibility rule called *Hourly Workers - U.S.*. Assign it to the time code group for hourly U.S. workers.

1. Complete these fields:

Field	Description
Condition Rule	*Hourly Worker - U.S.*
Description	*Hourly Worker - U.S.*

2. For Rule Conditions, enter:

Row	And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
1	And	Compensation Plans Effective	any in the selection list	Value specified in this filter	Hourly Plan
2	And	Location Address - Country	in the selection list	Value specified in this filter	United States of America

3. Access the Edit Time Code Group task for hourly U.S. workers and select *Hourly Worker - U.S.* in the Worker Eligibility field.

Next Steps

- Assign eligibility rules to:
  - Time code groups.
  - Time entry templates.
  - Time calculation groups.
  - Time periods.
- Review eligibility for a particular worker using the View Worker's Time Eligibility report.
- Delete an eligibility rule, if necessary, using the Delete Time Tracking Eligibility Rule task.

  You can't delete an eligibility rule that you assigned to any Time Tracking objects.

Related Information
Tasks
Create Time Code Groups on page 2661
Steps: Create Time Entry Templates on page 2672
Create Time Calculation Groups on page 2760
Examples
Create Calculated Fields
The Next Level: Overview of Primary Position Designation Impact

Concept: Worker Eligibility for Time Tracking

What Are Worker Eligibility Rules?

Time Tracking eligibility rules control a worker's ability to enter time by listing the conditions they must meet to be eligible for various Time Tracking components.

Example: An eligibility rule called *In/Out Workers* might specify that workers:

- Are hourly.
- Work in the company called Global Modern Services.

Eligibility for work schedules and holiday calendars, which other Workday applications share, aren't based on Time Tracking eligibility rules.

Assign worker eligibility rules to:

- Time code groups to identify which time entry codes a worker can use to enter time.
- Time entry templates to control the appearance of a worker's time entry calendar and its features.
- Time period schedules to identify the dates for which workers can enter time.

- Time calculation groups to identify the time calculations that apply to workers.

Each worker should be eligible for only 1:

- Time entry template
- Time period schedule
- Work schedule calendar

A worker can be eligible for multiple time code groups and calculation groups.

When Are Eligibility Rules Applied?

This table describes when Workday evaluates whether a worker meets the eligibility criteria for a Time Tracking component:

Component	When Must Worker Meet Eligibility?
Time entry template	On the last day of the week displayed on the time entry calendar (or the termination date of the worker if earlier). This applies to time shift settings and to time entry methods that record or populate time for multiple days at a time. Example: Auto-Fill from Schedule. On the day that time is being entered or populated. This applies to time entry methods that record or populate time for one day at a time. Example: Check In.
Time entry code (based on eligibility for time code group)	The default time entry code that Workday populates depends on how the worker records time. Examples: • When a worker checks in on a mobile device, Workday uses the eligibility for the default time entry code on the check-in date. • With Auto-fill from Schedule, Workday applies the default time entry code at the end of the week when autofilling the worker's time entries. You can't specify a date with this time entry method, so Workday uses the eligibility for the default time entry code on the last day of the week.
Time calculation (based on eligibility for time calculation group)	If you don't select the Run Time Calculation Eligibility Day by Day check box on the Edit Tenant Setup - HCM task, the worker must meet eligibility: • On the last day of the week displayed on the time entry calendar (or the termination date of the worker if earlier). • On the first day of the week, if the worker loses eligibility for all time calculation groups due to a midweek change. Example: A worker moves from being nonexempt to exempt. • For biweekly time calculations, the worker must meet eligibility on the last day of the

Component	When Must Worker Meet Eligibility?
	biweekly period (or the termination date of the worker if earlier). If you select the Run Time Calculation Eligibility Day by Day check box to evaluate worker eligibility for time calculations daily, the worker must meet eligibility on the date you select in the Start Daily Evaluation on Date field.
Time period schedule	On the last day of the week displayed on the time entry calendar (or the termination date of the worker if earlier).
Time entry validation group	For an object that is 1 day or less, Workday evaluates eligibility that day. For objects longer than 1 day, Workday evaluates eligibility on the last day of the time span. Example: For validations on an object that spans 1 week, Workday evaluates the eligibility on the last day of the week.

Related Information

Concepts

Concept: Daily Evaluation of Worker Eligibility for Time Calculations on page 2801

Concept: Effective Dating for Time Entry Templates on page 2698

Examples

Concept: Day Breakers

Create Work Schedule Calendars

Contributed Solution: Shifts Crossing Weeks with Eligibility Change in Time Tracking

Reference: Time Tracking Eligibility Reports

You can use the View Worker's Time Eligibility report (secured to the *Set Up: Time Tracking* domain) to view a worker's:

- Time entry templates.
- Time period schedules.
- Time calculation groups and time calculations.
- Time code groups and time codes.
- Work schedule calendars.
- History of work schedule calendar changes.

Workday displays the worker's eligibility information as of the:

- Date you select.
- Beginning and end of the period that date is in.

You can use the View Worker Time Eligibility by Organization report (secured to the *Set Up: Time Tracking* domain) to view the Time Tracking components for all workers in a specific organization.

You can use these audit reports (secured to the *Set Up: Time Tracking* domain) to identify setup issues or to validate eligibility changes you make:

- Audit - Workers with Multiple Time Entry Templates
- Audit - Workers with Multiple Time Period Schedules
- Audit - Workers with Multiple Work Schedule Calendars

Reference: Worker Eligibility for Time Entry Methods

Workday checks worker eligibility for time entry components based on the time entry method configured on the time entry template.

With these time entry methods, for all effective-dated fields except weekly totals, workers must meet eligibility on the day the time is reported:

- All public time entry web services and APIs.
- Check In/Check Out.
- Edit and Approve Time report.
- Enter My Time report.
- Enter My Time task.
- Enter Time.
- Enter Time by Week.
- Enter Time for Worker report.
- Enter Time for Worker task.
- Mass Enter Time report.
- Mobile Check In/Check Out.

With these time entry methods, for all effective-dated fields, noneffective-dated fields, and weekly totals, workers must meet eligibility on the last day of the week displayed on the time entry calendar (or the termination date of the worker if earlier):

- Add Time Clock Event
- Auto-Fill from Prior Week
- Auto-Fill from Schedule
- Edit Time Clock Event
- Enter Time by Type
- Mass Auto-fill from Schedule
- Quick Add

Related Information
Concepts
Concept: Effective Dating for Time Entry Templates on page 2698

Time Tracking, Payroll, and Absence

Steps: Set Up Payroll to Pay Time

Prerequisites

Create time calculation tags.

Context

Configure Workday Payroll to retrieve and pay approved calculated time from Workday Time Tracking.

Steps

1. (Optional) Set Up Company Taxes by Location (USA).

   Set up tax location mapping to have Workday map reported locations from time blocks to tax authority worktags.

2. Set Up Payroll and Time Tracking Period Schedules.

   Map time periods to pay periods to define:

   - The dates for which workers can enter time.
   - The dates for which Payroll retrieves calculated time each pay period.
   - Lockout dates to prevent time entry while processing payroll.
3. Set up retro pay functionality.

   To process prior period time adjustments and to pay time on a lag, use the Run Retro Pay Calculation task before running payroll each period.

   See Steps: Set Up Retro Processing.
4. Configure Earnings to Retrieve Calculated Time on page 2832.
5. To have Workday Payroll retrieve values for custom worktags that are associated with hours, set the worktag usage to *Payroll*.

Result

During the Run Pay Calculation task, Workday retrieves the time periods. Workday then filters for approved calculated time blocks that have calculation tags that match the tags assigned to the earnings.

Related Information
Concepts
Concept: Period Schedules for Time Tracking on page 2824
Create Time Calculation Tags on page 2735
Steps: Set Up Worktags for Time Entry on page 2708
Steps: Create Earnings
The Next Level: PATT Touchpoints Webinar

Configure Earnings to Retrieve Calculated Time

Prerequisites

- Set up payroll and time tracking period schedules.
- Set up retro pay functionality.

Security: *Set Up: Payroll (Calculations - Payroll Specific)* domain in the Core Payroll functional area.

Context

You can configure earnings to retrieve approved calculated time based on time calculation tags.

Steps

1. Access the Create Earning or Edit Earning task.
2. In the Worker Eligibility section, add eligibility criteria.

   To prevent payslips from showing a zero value for the earning when no approved hours exist, select *Timesheet Approved Hours for Earning <> 0*.
3. In the Calculation Details section, define Related Calculations to:

   - Aggregate hours that have the selected time calculation tags. Example: For an *Hourly Pay* earning, add a related calculation of *Hours (unprorated)*. For the Override Value select *Timesheet: Approved Hours for Earning for Sub-period*.
   - Use override rates in Payroll calculations, if you have configured time entry codes to accept override rates. Example: For an *Hourly Pay* earning, add a related calculation of *Rate*. For the Override Value select *Time Tracking: Override Rate for Time Block*.

4. On the Time section of the Effective Dated tab, specify which time to pay with the earning.

   Payroll only pulls time blocks that have the tags you select in the Time Calculation Tags column. Example: You select the *Overtime* time calculation tag. You can map the same calculation tag to more than 1 earning; however, you can't use the same hours in more than 1 net-to-gross result.

   In order for earnings to process time blocks, time blocks must have:

   - All the time calculation tags that you select in the same row, or
   - All tags specified in at least 1 row, if you define more than 1 row of tags.

Result

When you use the Run Pay Calculation task, Payroll retrieves approved calculated time that has calculation tags that match the tags assigned to the earnings.

Related Information
Concepts
Set Up Ongoing Multiple Work Jurisdictions with Time Tracking (USA)

Concept: How Payroll Processes Calculated Time

Integrating Workday Payroll and Time Tracking

Workday Payroll can pay employees for approved calculated time tracked through Workday Time Tracking. To configure the applications to work together, you must map earnings to time calculation tags and link time periods to pay periods.

How Workday Payroll Retrieves Time for a Pay Run

During the Run Pay Calculation task, Workday:

1. Retrieves the time periods mapped to the processing pay period.
2. Determines the dates for pulling in time based on the start and end dates of the mapped time periods.
3. Filters for approved calculated time blocks.

   If processing a subperiod, Workday looks for time on dates:

   - On or after the start date of the payroll subperiod.
   - On or before the end date of the payroll subperiod or the time period end date, whichever is earlier.
4. For the earnings, Workday retrieves approved calculated time that has calculation tags that match the tags assigned to the earnings.

Best Practices for Payroll Administrators

- Be sure that all corrections to time are approved before completing the retro pay calculation process. This prevents Workday from creating a negative retro difference for the time originally paid. Use these reports to identify workers with unapproved corrections to time blocks:
  - Retro Calculation Processing Report > View Retro Results
  - Retro Pay Calculation Results for Group of Workers
  - Retro Pay Calculation Results for Worker
  - Retro Pay Calc Result Audit Detail Report
- Use the Run Retro Pay Calculation task before each payroll:
  - To process prior period corrections.
  - When you pay time on a lag.

- Run payroll when the time period is locked.

  The time period schedule identifies lock dates during which workers can't enter time. Users with the appropriate security can change the lock date for a period if you need more time to complete the payroll.
- Recalculate payroll as necessary.

  Use the Run Pay Calculation task and select either Smart Calculation or Smart Calculation Based on Events (limited to time and time off entries).

Aggregating Time

Workday can pull details such as worktags and override rates from calculated time blocks into Payroll for costing and other purposes. Workday creates separate payroll result lines for each combination of worktags and override rates. If a worker has multiple jobs, Workday aggregates time blocks by position. You can set up aggregation on the Time Block Aggregation tab of the Maintain Pay Component Related Calculations for Aggregation task.

Using Override Rates

If configured for a time entry code, you can enter an override rate for a time block. If a time block has an override rate, the override rate is available to Workday Payroll and can be used in a payroll calculation. To use the override rate in a payroll calculation, use the *Time Tracking: Override Rate for Time Block* instance value calculation.

Related Information
Concepts
The Next Level: PATT Touchpoints Webinar

Concept: Time Tracking and Absence Management

Tracking Time Off

When you use both Workday Absence Management and Time Tracking:

- You can configure a time off so workers can request it using the *Request Time Off* business process or enter it through Time Tracking. You can also configure the time off so workers can use both options.
- Time offs entered through the *Request Time Off* business process display on the time entry calendar when workers submit them for approval.
- You can access the Request Absence task and Manage Absence report from the worker's time entry calendar only if you add security groups to 1 these initiating actions:
  - *Request Time Off for Self* and *Request Time Off for Worker* on the *Request Time Off* business process.
  - *Edit Time Off for Self* and *Edit Time Off for Worker* on the *Correct Time Off* business process.

Note: If you're using the legacy Absence Calendar, the tasks are called Request Absence and Enter Absence. Labels for related actions, reports, and report fields also use *Absence* instead of *Time Off*.

Including Time Off in Calculations and Totals	Use the Create Time Off task to assign time calculation tags to time offs that you want to include in: • Time calculations. • Totals that display at the top of a worker's time entry calendar.

Example: To count *Paid Time Off* hours as regular hours when calculating overtime, assign the *Regular* calculation tag to *Paid Time Off*.

Time off hours inherit calculation tags from the time off object. Time calculations don't add or remove any other tags.

Note: Once Workday includes a time off in a time calculation, no recalculation occurs if you then edit time off for that week. Use the Time Entry Re calculate report field in a business process or report to identify these situations. Then access the Enter Time for Worker task for the same week and click OK to execute the time calculations again.

Options for Entering Time Off

Method of Entry	Configuration	Approval Routing	Time Off Plan Balances
Time Tracking: Select the time off from the Time Type prompt when entering time. Time off and worked time is submitted and approved as 1 event.	Select *Enter through Time Tracking Only* on the Create Time Off page.	Controlled by the *Enter Time* business process. The business process event is created when you click OK.	Time off reduces the time off plan balance after approval. It updates the pending balance as soon as Workday saves it.
Absence Management: Access the Request Absence task or the Manage Absence report.	Select *Enter through Time Off Only* on the Create Time Off page.	Controlled by the *Request Time Off* business process. A separate time off event is created when you click Submit.	Time off reduces the time off plan balance after approval. If saved for later, Workday excludes it from the pending balance.

Method of Entry	Configuration	Approval Routing	Time Off Plan Balances
Both Time Tracking and Absence Management: Select the time off either from the Time Type prompt when entering time or through the Request Absence task or the Manage Absence report.	Select *Enter through Time Tracking or Time Off* on the Create Time Off page.	Controlled by either the *Enter Time* or the *Request Time Off* or *Correct Time Off* business process, depending on where the worker entered the time off.	Time off reduces the time off plan balance after approval. Visibility in the pending balance depends on which method the worker used to enter the time off.

Workday only permits 1 method of entry for each time off.

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. Example: You might want workers to enter unplanned sick time through the Time Type prompt, and planned sick and vacation time through the Request Absence task. If you want managers to approve time off and worked time in the same event, use the *Enter through Time Tracking Only* option. You can also use the *Enter through Time Tracking or Time Off* option.

All time off, regardless of how workers enter it, is subject to the data entry validations configured in Workday Absence Management.

Time Off Configuration

Use the Create Time Off task to configure these fields:

- Time Calculation Tags
- Entry Option

Time offs and time entry codes that have the same calculation tags must use the same units.

Time Offs with Start and End Times	You can require workers to enter start and end times when they enter time off through Time Tracking and Absence Management. Use the Edit Time Off task to configure Start and End Time Required. Workday calculates the duration of the time off based on the start and end times the worker supplies. Workers can also correct start and end times using the Correct Time Off task. This task causes Workday to update the length of the time off.
Paying Time Off	Workday doesn't send any calculation tags to payroll for time off. To pay time off, map earnings to Absence Component Related Calculations (ACRC), not time calculation tags.

Accruals

You can base accruals defined in Workday Absence Management on a worker's calculated time. Example: You can create an accrual that entitles workers to compensatory time off instead of overtime.

- Assign calculation tags to the accrual to specify which time blocks to consider as a basis for compensatory time.
- For the accrual calculation, select *Calculated Time for Period for Accrual* (an instance value calculation).

  This calculation sums the hours for time blocks with the mapped calculation tags for the date range that corresponds to the accrual period. Another option is to create your own calculation that references *Calculated Time for Period for Accrual*. Example: Your calculation might return 2 hours of accrual for every 4 hours of overtime.

When Workday maps a calculation tag to an accrual, the accrual adds to the time off plan balance immediately upon saving or submitting the calculated time blocks.

Accrual Configuration	Use the Create Accrual task to configure these fields:
	• Calculation
	    • Note:You can only use the calculation Approved Calculated Time for Day for Accrual(an instance value calculation) if your accrual has expiration defined.
	• Time Calculation Tags
	    • Note: Accruals and time entry codes that have the same calculation tags must use the same units.

Adjustments, Overrides, and Corrections

Regardless of how workers enter time off, you can use these Absence Management tasks for adjustments and overrides:

- Correct Time Off

  Once time off has been approved, it can only be corrected using the Correct Time Off task.

- Maintain Accrual and Time Off Adjustments/Overrides
- Maintain Time Off Plan Override Balances
- Maintain Accrual and Time Off Limit Overrides

Leaves

Employees can enter and submit time through Time Tracking while they are on leave unless you create a time validation to prevent submission.

Related Information
Concepts
Concept: Time Off Earnings
Create Time Entry Validations on page 2812
Create Accruals on page 2340
Steps: Set Up Time Offs on page 2278
Enter Time for Worker Using Calendar-Based Time Entry on page 2843
Steps: Set Up Calculations for Time Tracking on page 2734
Steps: Set Up Time Entry on page 2655
The Next Level: PATT Touchpoints Webinar

FAQ: Paying Time

How can we prevent employees from entering time when we're running payroll?	Enter lock dates on the time period schedule. See Set Up Payroll and Time Tracking Period Schedules.
Payroll is taking longer than we expected this pay period. Can we extend the lockout period for time entry?	Yes. An administrator with the appropriate security can change the lock dates for the time period schedule.
What happens if a worker has both time entries and payroll input for the same earning during a week?	Workday Payroll will process both and report the results on separate payroll result lines (payroll input doesn't override reported time). Example: If 40 hours of payroll input are entered for Lupe, and she enters another 3 hours through Time Tracking, 43 hours are processed.
How do I change the cost center or other worktag value entered for a worker's time after Workday Payroll retrieves the time?	As a best practice, use the Enter Time for Worker task to change the worktag value. Recalculate payroll to retrieve the corrected value.
What happens when time is entered after the payroll is complete?	To pay the time during the next on-cycle payroll, the payroll administrator should use the Run the Retro Pay Calculation task before running the next payroll.
What happens if time is corrected after it has been paid?	Correcting a paid time block changes its status to *Modified after Paid*. Workday Payroll will pick up the modified time block, after its approval, when you run the retro pay calculation process. Be sure all corrections are approved before completing the Retro Pay Calculation process to prevent a negative retro difference for the time already paid.

A worker who was eligible for overtime transferred midweek to a group that's not eligible for overtime. If he worked overtime hours before the transfer, will these be passed to payroll?	When you select the Run Time Calculation Eligibility Day by Day check box on the Edit Tenant Setup - HCM task to evaluate worker eligibility for time calculations daily, any overtime hours for the worker prior to the transfer will be automatically sent to payroll. When you don't select the check box, then not automatically. A worker must meet the eligibility requirements for the overtime calculation on the last day of the week for which time was reported. Since the worker did not meet eligibility criteria for the time calculation group at the end of the week, the overtime calculation is not executed. To enter overtime hours for the worker, use the Adjust Calculated Time task or make an adjustment in payroll.
Can more than one earning process the same hours?	Yes. However, you can't include the same hours in more than 1 gross-to-net result. Example: You can map time tagged as *Regular* and *Shift Differential* to both: • An *Hourly Pay* earning. • A *Shift Differential* earning. You can't include the same hours in a regular pay run and a separate bonus run.
We want workers to enter all hours through Time Tracking, but only want to pass exception hours to payroll for processing. Is this possible?	Yes. To accomplish this, don't map the calculation tag for regular hours to a payroll earning; only map the calculation tags for exception time to earnings.

How can I tell if a worker's time has been paid?	On the time entry calendar, Workday adds the word *Paid* to a reported time block after all related calculated time blocks are paid (after Payroll has a status of *Complete*).
	
	In addition, Workday delivers several report fields you can use in reports to determine how Payroll used time blocks. These report fields are based on the *Worker Time Block business object*:
	• *Payroll Status for Calculated Time Block*
	Possible statuses are:
	  ◦ Not Yet Pulled Into Payroll
	  ◦ Pulled into Payroll / Not Yet Completed
	  ◦ Payroll Completed
	  ◦ Modified After Paid
	• *Payroll Result for Calculated Time Block*
	• *Payroll Result Lines for Calculated Time Block*
	
	Use this report field, based on the *Payroll Result Line* business object, to see which time blocks were paid by a particular result:

	• *Time Block(s) for Result Line*
How do I figure out why an employee wasn't paid for some or all of his time?	Possible reasons include: • The earning isn't configured correctly. See Steps: Set Up Payroll to Pay Time on page 2831. • The worker didn't meet the eligibility requirements for the earning that is mapped to the time block. • The worker wasn't active during the pay period. • The worker has changed the time, but the change hasn't been approved yet. Check the time block history through the time entry.
Can time entries be paid by off-cycle payments?	Yes, time entries can be paid by replacement payments, but not by additional payments or manual replacement payments.
Is it possible to override the hourly pay rate when I enter time?	Yes. You can configure the time entry code to enable users to override the pay rate. You can also specify the currency of the override rate and restrict self-service users from entering override rates for their own time blocks. See Concept: How Payroll Processes Calculated Time on page 2833.

Time Management Hub

Steps: Set Up Employee Self-Service (ESS) Time Management Hub

Prerequisites

Note:

To use this feature, you must subscribe to one of these SKUs:

- Workday Time Tracking
- Workday Scheduling
- Workday Absence Management

If you want to purchase a SKU, contact your Customer Account Executive.

- For setting up hubs:
  - Security: These domains in the System functional area:
    - *Set Up: Tenant Setup – General*
    - *Set Up: Tenant Setup – Hub*

Context

The Time Management Hub is a customizable space that provides self-service workers with a single point of access to time management tasks and reports in one central location. You can configure the hub for your business needs by:

- Configuring announcements.
- Adding custom labels.
- Adding custom reports, dashboards, and tasks.
- Creating, reordering, and removing navigation items.

Workers have access to the hub's reports and tasks only if they have access to the domains that secure them. See Reference: Employee Self-Service (ESS) Time Management Hub for more information about the available reports and tasks in the Time Management Hub.

Steps

1. Edit Domain Security Policies.

   Configure the *Self-Service: Time Management Hub* domain security policy in these functional areas:

   - Time Off and Leave
   - Time Tracking
   - Scheduling
2. Set Up Hubs.

   Configure the Time Management Hub Overview page and the available items in the Navigation menu.

   Security: *Set Up: Tenant Setup – General* and *Set Up: Tenant Setup – Hub* domains in the System functional area.

Next Steps

You can hide legacy worklets in the global navigation menu for Time Tracking, Absence, and Scheduling tasks by removing user access to the following domains:

- *Self-Service: Worklets: Time Calendar and Scheduling* (Time and Scheduling - HVTE)
- *Self-Service: Worklets: High-Volume Time Entry and Scheduling* (Scheduling and Time and Scheduling - Calendar)
- *Self-Service: Worklets: Time Tracking* (Time - Calendar)
- *Self-Service: Worklets: Time Tracking High Volume* (Time - HVTE)
- *Self-Service: Worklets: Absence* (Absence)
- *Self-Service: Worklets: Time Off and Leave* (Time Off & Time Off and Leave)

Reference: Employee Self-Service (ESS) Time Management Hub

The Time Management Hub is a space for self-service workers to access time management tasks and reports in one central location.

You can configure the sections and cards that are accessible to workers from the Overview page of the Time Management Hub. By default, the Tasks and Reports section provides access to these commonly used time management tasks and reports:

- (Desktop Only) Request Absence
- (Desktop Only) Request Return from Leave of Absence
- Buy Time Off
- Sell Time Off
- (Desktop Only) Time Requests
- (Mobile only) Check In/Out

These cards also display by default on the Overview page:

Card	Security	Description
Time Clock	*Self-Service: Time Clock (Modify)*	Check in and check out on desktop.
Enter My Time (Desktop) Enter My Time (Mobile)	*Self-Service: Time Calendar (View)* *Self-Service: Time Tracking High Volume Enter Time (Modify)*	Enter time using the Time Entry Calendar (for users with access to the *Self-Service: Time Calendar* domain) or the High Volume Time Entry task.
Submit Time	*Self-Service: Time Tracking High Volume Submit Time (Modify)*	Enables high-volume time entry users to submit time. You have the option to submit only if you have unsubmitted time.
My Expiring Accruals	*Self-Service: Time Off Balances (View)*	Manage and track time off accruals that are expiring soon. Values displayed are as of today's date.
Absence Balances	*Self-Service: Time Off Balances*	View available time off balances as of today's date. Workday recommends hiding this card on the Maintain Hubs task when the Disable Absence Worklet Balances option is enabled on the Edit Tenant Setup - HCM task.
Upcoming Shifts	*Self-Service: View Schedule (View)*	View upcoming published scheduled shifts. This card only displays schedule information from Workday Scheduling.

The configurable Time Management Hub navigation menu enables easy access to additional relevant tasks and reports:

- My Schedule
- My Work Availability
- Open Shift Board
- My Team's Schedule
- Manage Absence
- (Desktop only) Time Clock History
- (Desktop only) Review My Time by Week
- (Desktop only) My Absence

To use the Time Management Hub, your organization's product subscriptions must include at least one of these SKUs:

- Workday Time Tracking
- Workday Scheduling
- Workday Absence Management

Entering and Correcting Time

Enter Time for Worker Using Calendar-Based Time Entry

Prerequisites

- Assign the worker a:
  - Time entry template.
  - Time period.
- Ensure the dates for which you're entering time aren't locked in the time period schedule.
- Security: *Worker Data: Time Calendar* domain in the Time Tracking functional area.

Context

Managers can enter time or edit existing time entries for workers using the time entry calendar. The appearance of the time entry calendar can vary depending on the template assigned to the worker. You can configure the calendar to display automatically in a weekly view or monthly view, and can give managers the ability to select the view they prefer. You can also enable managers to switch to a view that matches a worker's Time Tracking period schedule. Workers can enter and edit their own time using the Enter My Time report, which displays the same calendar views you configure for managers. Workers always enter and view time in their time zone.

You can also use the *Import Reported Time Blocks* web service to add time blocks from a third-party source.

To enter or edit time clock events for a worker, use the Time Clock History report.

Steps

1. Access the Enter Time for Worker report.
2. Click Actions.

   Depending on the security configuration on the *Enter Time* business process and the worker's time entry template, you might have several alternate time entry options. Alternate options include *Auto-fill from Prior Week* and *Quick Add*. You can also click directly on the time entry calendar to add a single time block or on an existing time block to edit it.
3. Select a Time Type.

   Time types can include time entry codes, projects, and time offs. The worker's eligibility for time code groups determines which time entry codes are available.
4. Enter the number of hours for the time block or the in or out times.
5. If the worker has more than 1 position, select a Position for the time block.
6. (Optional) Click Details to add values to worktags on the time block or to override the pay rate for the time block.

Result

Workday updates the worker's time entry calendar with your changes.

Next Steps

- Submit the worker's time if you deleted approved time blocks or time blocks that impact time calculations, such as overtime. Otherwise, you don't need to submit.

- (Optional) If necessary, force the *Enter Time* business process to advance to the next step or to completion. You can't manually advance your own time entries.
    - Use the Mass Advance Business Process task to manually advance all events for a time period, worker, or date range.
    - Use the Mass Operation Management task to advance all events for a specific list of workers captured by a custom report.

Related Information

Concepts

Concept: Business Process Management

Concept: Enter Time by Period on page 2871

Steps: Create Time Entry Templates on page 2672

Adjust Calculated Time on page 2858

Reference: Time Entry Options on page 2876

The Next Level: Overview of Time Tracking

2021R2 What's New Post: Time Tracking Monthly Calendar

Enter Time for Worker Using High-Volume Time Entry

Prerequisites

- The worker you are entering time for must be assigned a:
    - Time entry template.
    - Time period.
- Enter dates that aren't locked in the time period schedule.
- Security: *Worker Data: Time Tracking High Volume Enter Time* domain in the Time Tracking functional area.

Context

Managers can enter and edit time on a worker's behalf using high-volume time entry. They can Auto-fill from Prior Week if the worker's time entry template and the *Enter Time* business process security policy are configured for this. With some configurations, workers can enter and edit their own time using high-volume time entry with the Enter My Time task.

Steps

1. Access the Enter Time for Worker task.

   Workday generates time block rows based on the default in/out patterns on the worker's time entry template.
2. As you complete the task, consider:

Option	Description
Time Type	Workday bases the available time entry codes on the worker's eligibility for time code groups.
Out Reason	Workday bases the available out reasons on the configuration of the worker's time entry template.
Worktags	Workday bases the available worktags on the configuration of the time block's time entry code and the worker's time entry template.

Result

Workday updates the worker's time entry calendar with your changes.

Next Steps

- If necessary, force the *Enter Time* business process to advance to the next step or to completion. You can't manually advance your own time entries.
  - Use the Mass Advance Business Process task to manually advance all events for a time period, worker, or date range.
  - Use the Mass Operation Management task to advance all events for a specific list of workers captured by a custom report.

Related Information

Concepts

Concept: Business Process Management

Steps: Create Time Entry Templates on page 2672

Adjust Calculated Time on page 2858

Reference: Time Entry Options on page 2876

Enter Time for Worker Using Enter Time by Type (New!)

Prerequisites

Set up a time entry template.

See: Set Up Time Entry Templates for Enter Time by Type (New!) on page 2692

Security:

- *Process: Put Reported Time Blocks for Worker* domain in the Time Tracking functional area or the Time Tracking Hub functional area.
- *Self Service: Time Calendar* domain the Time Tracking functional area.
- *Worker Data: Time Calendar* domain in the Time Tracking functional area or the Time Tracking Hub functional area.

Context

You can configure time entry to enable workers and managers to quickly search for and enter time by project type.

Steps

1. Before you can access the Enter Time by Type (New!) task, set up security groups on the *Process: Put Reported Time Blocks for Worker* domain.

   See Edit Domain Security Policies in the Workday Administrator Guide.
2. Access the *Enter Time* business process.

   From the related actions menu of the *Enter Time* business process, select View Business Process Security Policy > Enter Time by Type (New!). Select the security groups that can access the task.
3. Access the Enter My Time task to enter time as an ESS.
4. (Optional) Access the Enter Time for Worker task to enter time as an MSS for a worker.
5. From the Actions prompt, select *Enter Time by Type (New!)*.
6. From the Time Type prompt, enter text to search for a project.
7. (Optional) Click Expand Search to launch the Enter Time by Type (New!) side panel and enter text to search for and select frequently-used projects to bookmark for quick access. A project that you

bookmark can appear as a Time Type prompt. You can remove a bookmark when it is no longer relevant.

Workday displays the projects used most recently when the side panel loads as the default view before you start your search.

You can search by full or partial names for:

- Project name
- Project plan task

Example: Enter MMM to display a list of all project names, project phases, and project plan tasks that include MMM. Workday sorts the search results alphabetically by customer, project name, project phase, and project task based on the configuration.

Search results appear on the All tab and bookmarked projects appear on the Bookmark tab.

When the search engine reaches the maximum number of results, refine your search to see relevant results. Workday runs an eligibility check on all search results and displays results only to workers who are eligible to search.

8. Select the projects to display on the Enter Time by Type (New!) grid.

   Projects display by customer name, project name, and project phase.
9. For each project, enter the time worked each day in the rows that you can edit. To make the process of entering time more efficient, you can:

   - Copy and paste numbers in the grid to single or multiple cells in the gird. You can also copy time quantity data from Excel or other external source and paste it to single or multiple cells in the grid. Time quantities must be valid numerical values. This action only copies the Time Quantity. It doesn't copy details such as worktags or comments.
   - Click Actions to copy Time Types from the prior week to the grid. This doesn't override existing time blocks and doesn't copy details such as worktags or comments.
   - Search for and add Time Types to the grid.
   - Filter the view of Time Types that you want to display in the grid.
   - Expand, collapse, and delete rows. Click Update after you delete a row to have the deletion take effect.

   You can't edit a time block on the grid or in the side panel when a cell:

   - Displays a system-generated block such as Paid Holiday.
   - Displays an In/Out block that allows In/Out Only as the entry method.
   - Displays a time off block with an absence time type.
   - Is on a date that is locked per the period schedule.
   - Is restricted from future entry per the Time Entry Code,
   - Is restricted from future entry per the Project Hierarchy Time Entry Code setting.
   - References more than 1 block of time of the same time type.
   - Isn't editable because you are no longer eligible for a project or project plan task.
   - Is tied to a billable transaction that is being invoiced.

   Note: You can only make edits for multiple time blocks in a day in the side panel.
10. Click Update to save time entered. Workday doesn't save time blocks if you leave the grid without clicking Update.

11. Click the pencil icon to edit details of time in the side panel. The options are:

    - Time Quantity.
    - Comment.
    - Worktags, which include default worktags for your configuration. Workday evaluates worktags daily to account for mid-week changes.
    - Position, which applies to workers with multiple positions and depends on your configuration.
    - Project Role, if configured to be visible to workers.
    - Do Not Bill, if configured to be visible to workers.

    On the side panel, you can:

    - Edit time blocks by clicking the Pencil icon. When you add a new time block, the default time quantity displays. This doesn't happen when you add a new time block on the grid. An administrator must configure the default time quantity in the time entry code for it to display in the side panel.
    - View details by clicking the Note icon. You can see details of Workday generated time blocks such as paid holidays or minimum hours worked.
    - Add or Remove individual time blocks.
    - Display the Time Block status.

    When you click Save on the side panel, Workday runs calculations and system validations to create time blocks. You must resolve any errors before you can save on the side panel.
12. Click Update to run calculations and validations for the time blocks entered in the timesheet grid. After the calculations run, Workday updates the weekly summary.

    You can run calculations to get daily totals of hours in the grid and weekly totals of hours in the grid, depending on how you set up the Time Entry Template. See Set Up Time Entry Templates in the Workday Administrator Guide.

    When you click Update, consider:

Condition	Behavior
Critical system errors	Workday won't create time blocks when there are critical system errors. Example: When there are incorrect time increments or missing worktags, Workday highlights the cell and displays a message that the update failed. You must resolve these errors to create time blocks. If you leave the task without resolving the critical errors, your time entry isn't saved.
Custom (customer-configured) alerts and error validations	When a custom error validation displays, Workday can create the time block and submit the time block. When a custom validation displays, Workday can create the time block, but can't submit it until you resolve the custom validation error.
Update button is grayed out	The Update button isn't available when there is nothing to update. Example: There is no entered time quantity, there are system errors that need to be resolved, or all changes were made and saved on the side panel.
Weekly navigation disabled	When you leave the task without resolving errors or without clicking Update, you lose the time you entered and Workday disables

Condition	Behavior
	navigation in the calendar until you click Update.
Row with empty time quantity	A row might not have any entered time. Workday doesn't remove the row with a time quantity of zero when you click Update or Submit. Workday removes the row if you leave the task and no time blocks are saved.

13. Click Submit to route a completed timesheet for approval and processing.

Result

The status of a timesheet displays next to the Update button. The status can be: Approved, Denied, Sent Back, Not Submitted, Submitted. When some time blocks are entered, but not submitted, the entire timesheet status shows as Not Submitted. Individual time blocks on the grid can have different statuses.

Related Information

Tasks

Set Up Time Entry Templates for Enter Time by Type (New!) on page 2692

Enter Time Requests for Worker

Prerequisites

- Steps: Set Up Time Requests on page 2717.
- Security: *Worker Data: My Team's Time* domain in the Time Tracking functional area.

Context

Managers and administrators can view details of workers' time requests for historical and future dates, and request time on behalf of workers.

Steps

1. Access the My Team's Time Requests report.
2. Select a date range to view time requests for historical and future dates.

   You can select a date range of up to 3 months.
3. (Optional) In the Workers prompt, select 1 or more workers.
4. Click New Request to request time on behalf of a worker.
5. In the Worker prompt, select the worker.
6. Select the date range you want the worker to be available to work.

   You can select a duration ranging from 1 day up to a month.
7. In the Time Request Code prompt, select a time request code for which the worker is eligible.
8. Depending on the entry methods configured for the time request code, consider:

Option	Description
Scheduled by	If required, select either: • *Start/End Time* • *Total Hours*
Start Time End Time	If required, enter a time range from 1 day up to a month. Available when either:

Option	Description
	• The entry method of the time request code is *In/Out Only*. • You select *Start/End Time* from the Schedule by field.
Total Hours	If required, enter the total number of hours for the time request. Available when either: • The entry method of the time request code is *Hours Only*. • You select *Total Hours* from the Schedule by field.

9. Click Submit.
10. (Optional) Bulk load time requests through the Put Time Requests EIB (secured to the *Process: Import Time Requests* domain in the Time Tracking functional area).

Result

Workday updates the worker's time entry calendar with the requested time block.

Example

Manager Plans for Overtime Work in Upcoming Month

Ben Adams' manager needs to budget for overtime hours for the month of February. The manager doesn't know how many overtime hours Ben will work, but can put in a request on Ben's behalf. He forecasts that Ben will work 15 hours of overtime, selects the dates in February and the appropriate overtime request code that allows time requests to cross the week breaker. This time request allows Ben's manager to reconcile the overtime hours that Ben actually worked against the time he requested for Ben.

Next Steps

- The worker must enter the actual time worked in order for Workday to calculate their hours and pass them to Payroll.
- Review and approve time requests from the Review and Approve Time Requests report (secured to the *Worker Data: My Team's Time Requests* domain).

Related Information

Concepts

Concept: Put Time Requests EIB

2025R1 Feature Release Note: Rename Request Overtime to Time Requests

Mass Enter Time

Prerequisites

Security:

- *Reports: Time Tracking* domain in the Time Tracking functional area.
- Configure the *Reported Time Batch Event* business process security policy in the Time Tracking functional area.

Context

Enter time for multiple workers at once. Example: Add holiday hours for all administrative assistants on New Year's Day. The Mass Enter Time report enables you to filter for workers by various facets, such as supervisory organization or job profile.

Steps

1. Access the Mass Enter Time report.
2. Search for and select the workers for whom you wish to enter time.

   You can customize the facets and filters that are available to you by copying this report to make a custom report. Workday delivers over a hundred different facets to select from.
3. Select a Date, Time Type, and optionally, Worktags.

   Worktags aren't available for time off entries.
4. Depending on the time type, enter:
   - A Quantity for projects, time offs, or quantity-based time entry codes.
   - An In time, Out time, and Out Reason for time entry codes that track *In* and *Out* times.
5. (Optional) For time entry codes that track *In* and *Out* times, click Add to add more time blocks with the same date, time type, and worktags.
6. Review the time entry details, Workers to be processed and, if applicable, Workers unable to be processed.

   To revise the time entry, click Back. To change the worker selection, rerun the report.

   Note: If you entered a time off, workers in the Workers to be processed list are subject to additional time off validations. Validations run after this event is submitted and approved or completed. If the workers fail these additional validations, they move to the Workers unable to be processed list after the additional validations complete.

Result

Workday adds the time blocks to the selected workers' time entry calendars using the *Reported Time Batch Event* business process. Submitting this task doesn't submit the time entries for manager approval. Manager approvals use the *Enter Time* business process.

Time off entries go through additional time off validations after the *Reported Time Batch Event* business process event is approved or completed. Workday doesn't add time blocks for workers who fail the time off validations.

Next Steps

- Access approved or completed events to see if any workers failed the additional time off validations.
- Submit time entries for approval.
- To undo the mass time entry, rescind the *Reported Time Batch Event* business process.

Related Information

Concepts

Concept: Finding Workers on page 111

Concept: Importing Reported Time Blocks on page 2867

The Next Level: A Day in the Life of a Time Tracking Administrator

Mass Auto-Fill from Schedule

Prerequisites

- Enable the workers' time entry templates for mass autofill from schedule.

- Ensure that the workers have schedule blocks to autofill, typically through:
    - Work schedule calendars for which they're eligible or to which they're assigned.
    - Changes that workers make to their work schedules.
    - Ad hoc schedule changes that aren't reflected on work schedule calendars.
    - The *Import Ad Hoc Schedules* web service.
- Security: *Process: Mass Auto-Fill from Schedule* domain in the Time Tracking functional area.

Context

Use the Mass Autofill from Schedule process to populate time blocks for multiple workers at once based on their work schedules. Workday uses data from Workday Scheduling when Workday Scheduling is enabled on workers' time entry templates. Workday populates time blocks with scheduled start and end times, but doesn’t populate worktag values. Workers must manually enter worktag values on time blocks before they submit time. This feature saves time for workers who only report schedule exceptions.

This process doesn't autofill time blocks for dates that:

- Fall into a period locked for Payroll.
- Fall into a period unlocked for adjustments.
- Are after a worker's termination date.
- Have any time off entries.
- Are holidays.

Note: Period schedules always open, lock, unlock, and close in Pacific time.

Steps

1. Access the Mass Auto-fill from Schedule task.
2. As you complete the task, consider:

Option	Description
Request Name	The request name identifies this job in reports.
Run Frequency	If your run frequency isn't *Run Now*, configure scheduling details on the Schedule tab. Select a Start Date that is no more than 7 days in the future.
Time Entry Templates	Select the time entry templates that are assigned to the workers for whom you wish to autofill time. Only the time entry templates that you enabled for mass autofill from schedule are available for selection.
Exclude Workers on Leave	When selected: • Prevents Workday from filling time blocks for workers who have approved leave of absence events during the period you're autofilling time for. • Doesn't delete time blocks that workers have on their calendar when you run the autofill process. Once a worker returns from a leave of absence, mass autofill resumes populating time blocks that occur after the Actual Last

Option	Description
	Date of leave entered on the *Return From Leave* business process.
OK to Proceed	Select the check box to confirm the criteria and scheduling details.

Result

When the process completes, workers receive the autofilled time blocks and can view and edit them before submitting them. Workday generates time blocks for all workers who are eligible for the time entry templates you selected.

Once you mass autofill time blocks from a work schedule, you're no longer able to edit the work schedule for those dates.

The process autofills time blocks in either the current week or the upcoming week, depending on the worker's start day of the week.

Example: For a worker whose work week starts on Sunday:

- If the process runs on Sunday, it autofills time blocks in the current week.
- If the process runs on any other day of the week, Monday - Saturday, it autofills time blocks for the upcoming week.

The Mass Autofill from Schedule process also clears existing time blocks in the week being filled that:

- Track in and out times.
- Share the same time entry code as the time blocks being autofilled.

Processes scheduled for the future display in the Scheduled Future Processes report. You can view the status of in-progress and recently completed processes on the Process Monitor report.

Next Steps

If you've set up a weekly recurrence, add the *Auto-fill time by schedule* service step to the *Hire* business process to automatically populate the time blocks of new hires if they begin after the Mass Autofill from Schedule process runs for a week. See: Concept: Auto-Fill Time by Schedule Service Step on page 2873.

Related Information

Concepts

Concept: Auto-Fill Time by Schedule Service Step on page 2873

Reference: Time Entry Options on page 2876

Auto Submit Time

Prerequisites

- Security: *Process: Auto Submit Time* domain in the Time Tracking functional area.
- Configure the *Submit Time* initiating action on the *Enter Time* business process and security policy in the Time Tracking functional area.

Context

Create schedules to submit time automatically when you don’t want to create separate schedules to mass submit time for each period. Auto submit time saves you time and effort and increases efficiency in managing the submission of time by eliminating the need to schedule the submission of time for each period and the need to manually select the list of workers.

If any time blocks are found in a period that satisfy the selection criteria, Workday submits all time blocks in that period.

Example: Instead of setting 52 different schedules to run mass submit time every week of the year, you can now set up 1 auto submit time schedule to run every Sunday at 11:55 p.m. for the previous 7 days. Workday will find all unsubmitted time for workers eligible for the selected time entry template(s) and submit the period in which this time is found.

When you import time blocks that overlap with existing time blocks, you must resolve the overlapping time blocks once they are in Workday. Correct the time blocks on the timesheet before submitting time.

Note: Don't run the Auto Submit Time task from an integration system user account.

Steps

1. Access the Auto Submit Time task.
2. Select a Run Frequency and click Next.

   The run frequency determines how frequently to submit time entries for a particular date range.
3. Enter a Request Name. The request name identifies this job in reports.
4. Enter these values in the Selection Criteria tab:

Option	Description
Auto Submit Periods With	Any Unsubmitted Time: To submit imported and user-entered time. Any Imported Time: To submit all imported unsubmitted time. Imported Time With Auto Submit Value True: To submit time that has Auto Submit value set to *True* in the *Import Reported Time Blocks*, *Import Time Clock Events*, and *Put Time Clock Events* web services. Selecting this option also submits any user-entered time block in the period that satisfies the selection criteria. Example: You are scheduling an auto submit for a worker for a given period with the Auto Submit value set to *True* for time blocks in the *Import Reported Time Blocks* web service. You are also scheduling a second batch of auto submit for the same worker for the same period with the Auto Submit value set to *False* for some time blocks in the *Import Reported Time Blocks* web service. In this case, Workday will submit the entire period, including the time blocks with Auto Submit value set to *False*.
Time Entry Template	When you run the Auto Submit Time task, Workday will submit time for workers eligible for the time entry templates that you select and the workers you have access to. Workday won't submit time for terminated workers when you run the Auto Submit Time task. Workday accounts for worker changes between the time you scheduled the job and when the scheduled job runs.

Option	Description
	You don't have to update the schedule if worker eligibility changes every week.
On Leave	Select either Include, Exclude, or On Leave Workers Only.
Workers	You can select only workers you have access to.
Exclude Current and Future Periods	Select this to exclude workers' current and future periods from being submitted automatically.

5. In the Dynamic Range section, enter the number of days before and after the actual run date that you want to check for unsubmitted time that matches the selection criteria.

   Example: If you enter 6 for Days Before Run Date for a weekly recurring schedule, you can capture the unsubmitted time from Sunday to the previous Monday.

   Example: If you set the Days Before Run Date to 6 days for a Run Now frequency, you can capture the unsubmitted time for the current date and for 6 days prior to the current date.
6. In the Schedule tab, set the recurrence criteria and range of recurrence.

   You can schedule the recurrence for up to 5 times after the end of the next calendar year.

   Example: If you schedule a monthly recurrence starting October 2024, you can schedule it through only May 2026, as that would be 5 recurrences after the end of the next calendar year.
7. Click OK and Done.

Result

When the process completes, Workday automatically submits time for all workers who meet the selection criteria as of the run date.

Next Steps

- Review the *Enter Time* business process custom notification frequency if you create frequent schedules to automatically submit time to ensure approvers don't receive too many approval notifications.
- Use the Reported Time Blocks for a Date Range report to check the successfully submitted time blocks for a specific date range.
- To edit or delete a background process scheduled to run once in the future or on a recurring basis, access the Scheduled Future Processes report. See Manage Scheduled Future Processes.

Related Information

Concepts

Automatically Submit Time

Mass Submit Time

Prerequisites

- Security: *Process: Mass Submit Time* domain in the Time Tracking functional area.
- Configure the *Submit Time* initiating action on the *Enter Time* business process and security policy in the Time Tracking functional area.

Context

Submit large volumes of time entries when you don't need or want your workers to submit their time individually. You can mass submit time entries for workers who clock in and out and rarely, if ever, use their time entry calendar to enter and submit time. You can also mass submit time to ensure that stray time entries that workers forgot to submit, or were unable to submit, are accounted for.

When you mass submit time offs that cross from 1 week into another week, you need to mass submit for both weeks for the time off to be submitted.

Note: Don’t run the Mass Submit Time report from an integration system user account.

Steps

1. Access the Mass Submit Time report.
2. (Optional) Select filters to refine the list of workers.
3. Select the workers for whom you'd like to submit time.

   The report displays all active workers as of the current date. When you run the report, it includes workers who had time entries as of that period and submits them. New hires and terminated workers don't appear in the report, but Workday submits time for them, too, if they've entered time for the period.

   Note: This also applies to any custom reports based on Mass Submit Time.

   Example: You terminated Steve from the Operations supervisory organization in a previous period (February 2022). When you run Mass Submit Time for the Operations supervisory organization for February 2019, Steve won't appear in the report but his time is correctly submitted.
4. Select a Run Frequency.

   The run frequency determines when or how frequently to submit time entries for a particular date range.

   Note: When you create a custom report based on Mass Submit Time and add custom facet filters or custom filters, Workday won't account for any worker changes between the time you scheduled the job and when the scheduled job runs. If you use the standard report, Workday accounts for worker changes between the time you scheduled the job and when the scheduled job runs.
5. Enter a Request Name. The request name identifies this job in reports.
6. Select a date range to submit time for in the Period Selection for Submit Time field.

   - To mass submit time entries for a period schedule on a recurring basis, set up additional mass submit jobs for each date range that belongs to the period. If you schedule this task to recur on a regular basis, Workday mass submits all unsubmitted time entries for the same period every time the task runs.
   - Workday uses the start and end dates of the period to determine which time entries to submit. Unless you select the Use Period Schedule Eligibility check box, workers don't have to be eligible for the selected period to have their time entries in that period submitted.
   - If you're not using period schedule eligibility, select the exact period of time that you want to mass submit.
7. (Optional) Select the Use Period Schedule Eligibility check box to limit the worker selection to workers who are eligible for the selected period.

   If you don't select this check box, Workday submits all time entries for:

   - The weeks or time periods that intersect with the selected time period.
   - The workers who meet the filter conditions.
   - The workers whose time entries you have the security access to submit time for.
8. If your run frequency isn't *Run Now*, you can refine run frequency details on the Schedule tab.

   The details you select define how often Mass Submit will run for the period instance you selected on the Period Selection tab.

Result

Workday sends you a notification that includes the names of the workers whose time you submitted as well as a summary of the time submitted.

Processes scheduled for the future display in the Scheduled Future Processes report. You can view the status of in-progress and recently completed processes on the Process Monitor report.

When the process completes, all workers who meet the eligibility conditions as of the run date have their time mass submitted.

Next Steps

You can copy the Mass Submit Time report into a custom report and add unique facets. However, the Pay Group and Time Entry Template facets aren't available for use. The unique facets that you use aren't effective dated.

Related Information
Concepts
The Next Level: A Day in the Life of a Time Tracking Administrator

Manage Time Clock Events

Prerequisites

Security: Configure these domains in the Time Tracking functional area:

- *Time Tracking: Edit Time Clock Event Date and Time*
- *Worker Data: Add Time Clock Events*
- *Worker Data: Delete Time Clock Events*
- *Worker Data: Match Clock Events*
- *Worker Data: View/Edit Time Clock Events*

Context

You can manage time clock events on behalf of a worker by adding, editing, and deleting time clock events using the Time Clock History report. Time is always entered and displayed in the worker's time zone. Managers and administrators can use the Maintain Invalid Time Clock Events for Workers task to correct or ignore invalid time clock events for the manager's direct reports.

Steps

1. Access the Time Clock History report for the worker.
2. Select a Start Date.

   The report displays all time clock events for the week containing the Start Date.
3. To manually add a time clock event, click Add Clock Event and select an Event Type.
   a) (Optional) Change the Date and Time of the time clock event.
   b) Select an Event Type.

      - For a check-in, select a Time Type. The available time entry codes are based on the worker's eligibility for time code groups.
      - The available check-out types are based on the worker's time entry template.
      - To perform a transfer, add 2 check-in events in a row. Workday treats the second check-in event as a check-out and creates a time block with the work details of the first check-in event.

      Workday doesn't prevent you from entering time clock events out of sequence. Example: 2 check-out events in a row. This gives you more flexibility when handling exceptional cases.

Verify that you're adding the appropriate event type to prevent Workday from matching time clock events in unexpected ways.

4. To edit or delete a time clock event, click Edit or Delete.
    - When you edit a matched time clock event, the associated time block updates with the edited information. Editing the time block doesn't affect the underlying time clock events.
    - If you delete a matched time clock event, Workday deletes the associated time block. The remaining time clock event reverts to an unmatched status.
    - You can also use the Time Clock History report to edit time clock events loaded through web services from an external time collection system.

Related Information

Concepts

Concept: Time Clock Events on page 2863

Reference: Time Clock Event Security on page 2875

Manually Schedule Time Clock Event Matching

Prerequisites

- Enable the *Defer Time Clock Event Processing* option on the Edit Tenant Setup - HCM task.
- Security: *Process: Time Clock Event Processing* domain in the Time Tracking functional area.

Context

Note: Workday plans to retire the Defer Time Clock Event Processing option in a future release. Enabling this feature could impact performance in your tenant. Contact Workday Professional Services before using this feature.

Manually schedule a process that matches deferred time clock events and runs calculations for all workers in your tenant.

If your tenant uses automated scheduling for time clock event processing, any processes you manually schedule run in addition to the automated process.

To match pending time clock events for an individual worker, use the Time Clock History report instead.

Steps

1. Access the Run Time Clock Event Processing task.
2. Select a Run Frequency.
3. Enter a Request Name.

    The request name identifies this job in reports.
4. If your run frequency is anything other than *Run Now*, configure scheduling details.

Result

Processes scheduled for the future display in the Scheduled Future Processes report. You can view the status of in-progress and recently completed Process Time From Events jobs on the Process Monitor report.

If a pending time clock event fails to match, its status becomes *Unmatched*.

Next Steps

Resolve any remaining unmatched time clock events.

Related Information

Concepts

Concept: Time Clock Events on page 2863

Adjust Calculated Time

Prerequisites

- Confirm that you're not entering time for locked days in the time period calendar.
- Configure the *Enter Time* business process and security policy in the Time Tracking functional area.

Context

Modify or add calculated time on behalf of a worker. Use this task if the existing calculation types don't meet a business requirement. You can also use this task if there's an exception for a particular worker. Example: You assigned a worker a new work schedule calendar in the middle of a biweekly period. The new work schedule calendar has a different biweekly calculation start date. As a result, you need to adjust the worker's biweekly overtime calculation results.

Considerations for adjusting calculated time:

- This task applies to time entries only. Adjust time off entries through Absence Management.
- You can't adjust your own calculated time.
- Calculated time offs that cross the week breaker are split based on the day breaker. Only the hours that fall into the date range of this task can be edited. You can navigate to an adjacent week to edit the remaining hours.
- You can make adjustments at any time. However, submitting calculated time adjustments automatically routes time entries for the week or period time entries for approval. Even if a worker hasn't submitted their time or you previously approved it, Workday routes it for approval.

  Note: Only adjust calculated time after you've finished making time entries for that week or time period. After adjusting calculated time, Workday no longer runs calculations for that week or time period.

Steps

1. Access the Adjust Calculated Time task.
2. Select a Worker and the Date within the week or period you want to adjust.

   You can make adjustments to the calculated time in the week in which the selected date falls. Example: You configured the worker's time entry template to submit time by period. The date you select falls in a week that includes more than 1 time period. You can make adjustments for time entries in the days of the week that are in the time period of the selected date.

   Example: Monday - Wednesday is part of 1 time period and Thursday - Friday are part of another time period for a worker who submits time by periods. If you select the date of Wednesday, you can make adjustments for Monday, Tuesday, or Wednesday.

3. To modify or add calculated time:
    a) Adjust the quantity of hours for a calculated time block resulting from reported time.
        - To delete a row, adjust the hours of the row to zero.
        - To change a calculation tag or worktag, adjust the hours of the existing row to zero. Then add a new row with the new calculation tag or worktag.
        - If you need to change the time entry code, use the Enter Time for Worker task instead.
    b) To add calculated time blocks manually without a related reported time block, add a row under Additional Calculated Time (not resulting from Reported Time).

       You can select any time code, not just time codes for which the worker is eligible. If you select a code the worker isn't normally eligible for, verify that the worker meets payroll eligibility rules for the applicable earning.
    c) Select Confirm Calculated Time Adjustments.
4. (Optional) To revert back to Workday-generated calculated time, select Clear Adjustments (Revert to system calculations).

   If the worker is eligible for biweekly time calculations, this option clears all calculated time adjustments for the current week and the other week of the biweekly period.

Result

The adjusted calculated time blocks route for approval. The status of adjusted time blocks displays as *Adjusted* on the time entry calendar.

Example

Gina logged 5 hours of work on a special project last Friday. Normally, your company pays workers who work on the special project a regular rate. However, Gina is paid at an overtime rate. Logan, who has the appropriate security access, accesses the Adjust Calculated Time task. Logan changes the calculation tags for the 5 hours on Friday for the special project from *Regular* to *Overtime*. She adjusts the quantity of regular hours from 5 to zero and adds a new row with 5 hours of overtime.

Next Steps

(Optional) Create a time validation that warns workers who try to enter time for a week or time period with adjustments.

FAQ: Time Entry

- A worker checked in on mobile, and their manager used the time entry calendar to check them out. Why isn't the worker's Home page card showing that they've checked out, and why didn't Workday update their status on the mobile app? on page 2861
- How can I populate my work details from previous check-in when I use the check-in time entry method? on page 2861

Why don't I see the Quick Add, Auto-fill from Schedule, or Auto-fill from Prior Week options when entering time?	Check to see that you have: 1. Enabled the options on the relevant time entry template. 2. Configured the *Enter Time* business process security policy so that you have security access to the time entry options. 3. Activated the pending security changes.
When I select Auto-fill, why can't I copy time from a prior week?	The worker doesn't have any reported time for the week you're trying to copy from. If there are no weeks to copy from at all, the worker hasn't reported any time for any week.
Why don't I see any of my previously entered hours on the Quick Add page?	Quick Add only adds time blocks to your calendar; it doesn't display, modify, or overwrite any time blocks you've already entered. However, you'll get an error if you try to add hours that conflict with existing time blocks on your calendar.
Why do I get the message ***Date is not available for time entry for xxx*** when I try to enter time on behalf of a worker?	Workday can't find a period schedule for that worker. There are a couple of reasons this could happen: • The worker doesn't have a time period schedule or the schedule doesn't include the week you want to enter time for. • The worker isn't active.
Why isn't my time off showing up on my time entry calendar?	You've probably saved your time off request for later and haven't submitted it yet. Any time off entered through the Request Time Off task doesn't display on your calendar until it's submitted. However, time offs entered as a Time Type will display on your calendar as soon as you enter them.
Why aren't worker time entries transferring to the time entry calendar correctly? Example: The worker enters 9:00 AM - 12:00 PM, but it displays on their calendar as 7:00 AM - 10:00 AM.	You probably haven't configured local time zones for the worker, the location, or the tenant. Workday first tries to use the worker's time zone, but if you didn't configure it, Workday looks for the time zone of the location. If you didn't configure the location time zone, Workday then looks for the time zone of the tenant. If you didn't configure the tenant's time zone either, Workday uses Pacific Time for all time entries. See Concept: Support for Local Time Zones.
How can I add worktag values to the My Favorites category folder on the Worktags prompt?	Select Favorite from the related actions menu on the worktag.

What is the difference between time blocks with the ***Never Submitted*** status and time blocks with the ***Not Submitted*** status?	The *Never Submitted* status is for time blocks deleted prior to approval, while the *Not Submitted* status is for time blocks not yet submitted for approval.
I changed a worker's position. Why is the new position displayed on time blocks dated before the change?	You updated the worker's position details without changing their job. Use the *Change Job* business process to add the new position to time blocks from the effective date of the change. See Transfer, Promote, or Change Job on page 821.
A worker checked in on mobile, and their manager used the time entry calendar to check them out. Why isn't the worker's Home page card showing that they've checked out, and why didn't Workday update their status on the mobile app?	Workday updates Home page cards and check-in/out buttons on the mobile app through time clock events, not time blocks. Workday creates time blocks, not time clock events, when you use Correct Unmatched Event by selecting either: • Unmatched events on the time entry calendar. • Edit Time Entry on the Edit and Approve Time report. To add time clock events, use any of these methods: • From the related actions menu for the worker, select Time and Absence > Add Time Clock Event. • On the Edit and Approve Time report, add a check-out event to an unmatched check-in by selecting Autofill Scheduled Out. • Use the Time Clock History or My Time Clock Historyreport.
How can I populate my work details from previous check-in when I use the check-in time entry method?	Select the Use default values from previous check-in check box in the Check In task to copy over details such as time type, position, and worktags from the prior check-in. This option is available when checking in after a meal or break.

FAQ: Enter Time by Period

For workers with a weekly time tracking period schedule and a semimonthly payroll schedule, what view does Workday display in the period time calendar?	Workday displays the calendar view that matches the workers' time tracking period schedule, so these workers see a weekly calendar view.
Can I make the period calendar available to only some of our workers?	You can enable different calendar views for different populations of your workers based on the time entry templates you assign them. You configure the calendar view in the Calendar section of workers' time entry templates. To enable the period calendar for workers, from the Primary Calendar prompt, select: • *Classic* to display the period calendar as an additional view.

	• *Period* to display the period calendar as the primary view. • *Period Only* to display the period calendar as the only view.
Is the period calendar view supported on the Mobile App?	No. Workday displays a weekly view on mobile app.
Where do my workers see time blocks that cross midnight?	Workday displays In/Out time blocks on the day associated with the In time of the time block. However, the daily totals are based on the reported or calculated quantities you configure on the workers' time entry templates.
For nonmidnight day breakers, does the calendar have 8 days in each row?	The report calendar always has 7 days per row. Workday displays time blocks that cross the day breaker on the calendar day that matches your day breaker configuration.

Troubleshooting: All Imported Time Clock Events Unmatched

Cause: You imported the:

- Time clock events while the period was locked or closed.
- Same time clock events twice.

Solution: Delete a small number of unmatched time clock events:

Security: Configure the *Worker Data: View/Edit Time Clock Events* domain in the Time Tracking functional area.

Steps

1. Access the Time Clock History report for the worker.
2. Select a Start Date that includes the week of the unmatched events.
3. Delete the unmatched events.

Solution: Delete a large number of unmatched time clock events using the Enterprise Interface Builder (EIB):

Note: To delete multiple time clock events, you must have their unique Time Clock Event IDs. Otherwise, follow the steps for deleting a small number of unmatched events.

Security: *Integration Build* domain in the Integration functional area.

Steps

1. (Optional) Access the Maintain Invalid Time Clock Events task to check for errors and see the volume of unprocessed and unmatched time clock events.
2. Access the Create EIB task.

   Select Inbound.
3. On the Get Data page, in the Data Format section, from the Web Service Operation prompt, select *Put Time Clock Events (Web Service)*.

   Accept the default settings.
4. On the View Integration System report, from the related actions menu of the EIB, select Template Model > Generate Spreadsheet Template.

   Select Confirm.
5. On the View Background Process report, click Refresh.

   Download the empty Put_Time_Clock_Events.xlsx spreadsheet from the Output Files tab.

6. In the spreadsheet, enter the time clock event data you want to delete. Use only the first 4 columns of the spreadsheet.

Column	Description
Spreadsheet Key	Determines how many entries Workday batches for each job. We recommend that you batch together 1,000 time block entries per job. Example: Use *1* for the first 1,000 rows and *2* for the next 1,000 rows.
Row ID	An incremental value for each row. Example: Use *1* for the first row, *2* for the second row, and *3* for the third row.
Time Clock Event ID	Each time clock event has a unique ID. You must enter the ID to delete the event.
Delete Time Clock Event	Enter *Y* to indicate that you want to delete the time block.

7. Access the Launch / Schedule Integration task.

   From the Integration prompt, select Put TCE.

   Security: *Process: Time Clock Integration* domain in the Time Tracking functional area.
8. On Schedule an Integration, in the Integration Attachment row, from the Value prompt, select Create Integration Attachment.

   Attach the completed spreadsheet.
9. (Optional) To verify that no errors or unmatched time clock events remain, access the Maintain Invalid Time Clock Events task.

Concepts: Entering and Correcting Time

Concept: Time Clock Events

Time clock events describe a worker's actions on the Workday Time Tracking time clock or a third-party time collection system. Example: A check-in or check-out. Workday matches time clock events together and translates them into time blocks that display on the worker's time entry calendar.

Creating Time Clock Events

Workers can check in and out directly in Workday using:

- The Time worklet.
- Mobile devices. When you select the Enable Standard Mobile Check-In check box on the Edit Tenant Setup - HCM task, workers can enter time types, worktags, and comments when checking in. They can also specify out reasons when checking out.
- The My Time Clock History report on desktop to manually add time clock events, if granted the appropriate security. If managers have the appropriate security, they can also use the Time Clock History report on desktop to add, edit, or delete time clock events on behalf of workers.

You can use the time clock as the exclusive time entry method for a worker. You can also use it as a supplement to Enter My Time task or report. You can restrict workers to checking in or out only at work locations by limiting access to time-clock tasks to certain IP addresses. You can also use geofences to ensure that workers only check in and out on their mobile devices when they're at their work locations.

You can also use these web services to load time clock events from a third-party time collection system:

- *Put Time Clock Events*
- *Import Time Clock Events*

Matching Time Clock Events

Unless you configure your tenant to defer the matching process, Workday matches a time clock event as soon as you create it. If you defer matching, new time clock events are *Pending* until they've gone through the matching process. Workday displays pending time clock events on a worker's time entry calendar, but they don't need to be corrected. You can schedule the matching process for all pending time clock events in your tenant using the Run Time Clock Event Processing task. You can also match pending time clock events for an individual worker using the Time Clock History report.

When matching, Workday attempts to find a matching clock event, such as a check-in event with a check-out event. Workday then links the 2 events together to create a time block, which displays on the worker's time entry calendar. When creating a time block, Workday honors the rounding option of the time entry code and runs time calculations.

Generally, Workday matches a check-in event with a subsequent check-out event. However, in the case of 2 check-in events in a row, Workday treats the second check-in event like a check-out event. Then Workday creates a time block with the work details of the first check-in. This enables workers to check in to another task without having to check out of their current task. You can prevent matching consecutive check-in events by configuring the time entry template.

When Workday can't find a matching time clock event, it leaves the time clock event unmatched until you add another event that can match it. If a pending time clock event fails to match, it becomes an unmatched time clock event, rather than remaining as a pending time clock event.

Adding Missing Time Clock Events

Unmatched time clock events result from missing check-in or check-out events. Missing events can occur when you import time from third-party clocks or time collection systems. They can also occur when workers check in or out using:

- Home page cards.
- The mobile app.
- The Time worklet.

To add missing time clock events:

- From the related actions menu for the worker, select Time and Absence > Add Time Clock Event.
- Import additional time clock events.
- On the Edit and Approve Time report, add a check-out event to an unmatched check-in by selecting Autofill Scheduled Out.
- Use the Time Clock History or My Time Clock History report.

Generating Time Blocks from Missing Time Clock Events

Workday generates time blocks and not matching time clock events when you correct unmatched events on the:

- Edit and Approve Time report by selecting Edit Time Entry.
- Time entry calendar.

Example: A worker checks in on mobile at 9:00 AM, but they forget to check out at 5:00 PM. Their manager finds the unmatched check-in on the time entry calendar and corrects the unmatched event there. Workday doesn't update the worker's mobile or Home page card with a check-out because the time entry calendar created a time block and not a check-out event.

Time Clock Events on the Time Entry Calendar

Workday displays both pending and unmatched time clock events on the time entry calendar in chronological order until they're matched into time blocks. You can correct unmatched time clock events from the time entry calendar, but not pending time clock events. When you correct an unmatched time clock event by adding a corresponding in or out time, Workday creates a time block but not another time clock event.

Related Information

Tasks

Manually Schedule Time Clock Event Matching on page 2857

Manage Time Clock Events on page 2856

Reference

Reference: Time Clock Event Security on page 2875

Examples

Create Access Restrictions

Concept: Importing Time Clock Events

You can import data from a third-party time collection system into Workday Time Tracking using the *Put Time Clock Events* or *Import Time Clock Events* web services. These web services import raw clock data as time clock events, which Workday matches to create time blocks and run calculations. Workers can edit the time blocks before submitting them.

Importing Large Batches of Time Clock Events

If you use *Put Time Clock Events* to import more than 1,000 time clock transactions, the integration could take a significant time to complete and might hold up other Workday processes. In this case, use the *Import Time Clock Events* web service.

Use the *Import Time Clock Events* web service when you need to import large batches of 1,000 or more time clock events on an infrequent basis. Example: Importing time clock events for implementation testing or loading a single large batch after an integration with a third-party system fails. *Import Time Clock Events* runs as a background process, so it doesn't hold up other Workday tasks running at the same time.

The Import web service pattern enables you to use Workday Enterprise Interface Builder (EIB). To retrieve processing errors after using *Import Time Clock Events*, you can use the:

- *Get Import Process Messages* web service.
- Unprocessed Time Clock Events report.

Importing Small Batches of Time Clock Events

Use the *Put Time Clock Events* public web service operation when you need to import time clock events from a third-party system in near real-time. The third-party system should queue up clock events into batches and initiate a call to *Put Time Clock Events*. If Workday is unable to receive a batch, the third-party system must continue to queue time clock events until Workday is available.

When using the *Put Time Clock Events* web service, we recommend that you:

- Send time clock events in their raw form (not matched to time blocks or processed in any other way).
- Send batches every 2-5 minutes.
- Send time clock events in the order that they occurred to ensure Workday matches them into time blocks as accurately as possible.
- Don't send a batch with more than 150 time clock transactions. If you have more than 150 time clock transactions to send, break them into smaller batches.

Required Fields

Time clock events imported into Workday must include these details:

Field	Notes
Time Clock Event Date Time	Date and time of the time clock event. If you don't specify a time zone offset, Workday assumes a UTC offset of zero.
Clock Event Type Reference	Workday accepts 4 time clock event types: *In*, *Out*, *Break*, and *Meal*.
Employee ID	
Position ID	Required if the worker has multiple jobs and the time clock event type is *In*.
Time Clock Event ID	Required for edit and delete transactions so that Workday can identify which time clock event to edit or delete.
Delete Time Clock Event	When flagged, identifies the transaction as a deletion. If you're importing a deletion, the only required fields are: • *Time Clock Event ID* • *Delete Time Clock Event*

All other fields are optional.

Errors and Validations

Data accepted by the web service operation might still be invalid within Time Tracking. Workday runs a separate set of validations on the data after it has passed through the web service operation and flags invalid time clock transactions. Workday doesn't match invalid time clock transactions to time blocks, but causes them to be in error until you correct the transaction. Use the Maintain Invalid Time Clock Events task to view, fix, or ignore transactions that are in error.

Invalid or missing values in these fields cause the time clock event to be in error until corrected:

- *Employee ID*
- *Position ID*
- *Time Clock Event Date Time*
- *Clock Event Type Reference*

The fields below are optional, but if sent, must be valid values in Workday. Invalid values cause the time clock transaction to be in error until corrected. These fields apply to *In* time clock event types only. If the time entry code is blank, Workday applies the default time entry code from the worker's time entry template.

- *Time Entry Code*
- *Project ID*
- *Task ID*
- *Override Rate*
- *Business Unit*
- *Cost Center*
- *Custom Organization 01 - Custom Organization 10*
- *Custom Worktag 01 - Custom Worktag 15*
- *Fund*
- *Grant*
- *Job Profile*

- *Location*
- *Program*
- *Region*

Editing and Deleting Time Clock Event Data

You can edit or delete time clock events using the *Put Time Clock Events* web service. When importing an edit transaction using the web service, include the time clock event ID in the file. When you import edit transactions, Workday replaces the existing details on the time clock event with the details of the new transaction. Include all of the details that you want to preserve in addition to the edited fields. When importing a delete transaction, set the *Delete Time Clock Event* field to *Y* (for yes).

In addition to importing edits and deletions, you can manage time clock events directly in Workday.

Report or Task	Considerations
Maintain Invalid Time Clock Events for Workers task.	Managers and administrators can edit or ignore invalid time clock events for the manager's direct reports.
Time Clock History report.	You can edit and delete any type of time clock event.

Related Information
Reference
Concept: Import Web Service Pattern
Examples
Concept: Workday Web Services
The Next Level: Time Tracking Reports, Dashboards, and Integrations

Concept: Importing Reported Time Blocks

The *Import Reported Time Blocks* web service enables you to import reported time blocks into Workday Time Tracking using Workday Enterprise Interface Builder. Consider using this web service to:

- Import time blocks that workers didn't enter through self-service time entry.
- Load a batch of time blocks in bulk, such as holiday time blocks.
- Import large batches of time blocks for testing purposes.
- Edit and delete time blocks in mass.
- Approve or rescind the imported time blocks using the *Reported Time Batch Event* business process.
- Use imported time blocks in calculations, route them to managers for approval, and pass them to Payroll for payment.

Spreadsheet Setup

As you complete the EIB template, consider these fields:

Element	Notes
Header Key	An incremental value for every set of 1,000 rows of data. The header key determines how many entries Workday batches for each job. We recommend that you batch together 1,000 time block entries per job. Example: Use *1* for the first 1,000 rows and use *2* for the next 1,000 rows.

Element	Notes
	Don't use a different header key for each row, as this will cause each row to run as separate jobs and leads to performance issues. This field is only available on web service versions earlier than 36.2.
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, and *3* for the third row. Start the numbering over again, with 1, for each batch. This field is only available on web service versions earlier than 36.2.
Spreadsheet Key	An incremental value for each row. Example: Use *1* for the first row, *2* for the second row, and *3* for the third row.
Worker	The employee ID for the worker.
Worker Time Block	The reference ID for the worker time block. After you import time blocks into Workday, Workday assigns the worker time block a reference ID. To edit or delete a time block, you must enter the reference ID for the time block. To view the reference IDs for a group of worker time blocks, use the Reference ID report field on the *Time Block* business object. To view the reference ID for a single time block, access the related actions menu of the time block.
Delete Time Block	Enter Y or N to indicate whether to delete the time block.
In Date Time Out Date Time	Use these columns to enter the date and time of In/Out time blocks. Times are automatically in PST, so you might need to populate a UTC offset amount to load time blocks correctly. Example: October 25, 2018 at 8:00AM CET is: *2018-10-25T08:00:00+02:00*
Time Entry Code	The reference ID of the time entry code. Access the time entry code reference ID using the related actions menu of the time entry code.
Quantity Date	Use these columns to enter the date and quantity of Hours Only time blocks.
Comment	Enter a comment for a time block. The Require Comments on Time Entry Changes setting on the time entry template doesn't apply to web services.

Element	Notes
Project Role	The worker's project role. This value is derived from the worker's assignments on a project's resource plan line.

Editing and Deleting Time Blocks

To edit a time block, enter the Time Block Reference ID in the Worker Time Block column along with the updated time block information. When you import the batch, Workday will override the values on the existing block with the new values you entered. To delete a time block, enter *Y* in the Delete Time Block column of the EIB spreadsheet.

The same restrictions that apply to the time entry calendar apply to the EIB. If you can't delete a time block on the calendar, then you can't delete it through the web service. Example: If the time block belongs to a locked period.

Reported Time Batch Event Business Process

Importing a batch of reported time blocks launches the *Reported Time Batch Event* business process. Update the business process security policy so that relevant workers can approve or rescind the time blocks before Workday processes and creates time blocks. If approval steps conflict with the requirements of your organization, add a business process condition for external load so that Workday automatically processes the time blocks.

Workday treats time blocks identically to reported time blocks created directly in Workday, meaning that:

- The time blocks display on the worker's time entry calendar in a *Not Submitted* status.
- The imported time blocks are subject to the same calculations and validations as time blocks entered directly into Workday.
- Workers can make corrections and submit the time blocks for manager approval.

Rescinding Batches

You can rescind a *Reported Time Batch Event* business process event to back out a batch of time blocks you imported. To rescind an event, navigate to the related actions menu of the event and select Business Process > Rescind or use the Mass Rescind Business Processes task.

When you rescind, Workday removes all of the time blocks that you imported in the batch event. However, rescinding a batch won't back out changes you made by editing or deleting time blocks. To restore those blocks, you must run another import with the correct time block information.

Using the *Import Reported Time Blocks* web service EIB, Kevin:

- Edits an existing time block on 2019-02-04.
- Deletes an existing time block on 2019-02-07.
- Creates a new time block on 2019-02-08.

Worker	Worker Time Block	Delete Time Block	Date	Quantity
21722	WORKER_TIME_BLOCK_-1-38		2019-02-04	8
21722	WORKER_TIME_BLOCK_-1-41	Y	2019-02-07	8
21722			2019-02-08	8

The time blocks display on the worker's time entry calendar as:

2019-02-04	2019-02-05	2019-02-06	2019-02-07	2019-02-08
8 hours				8 hours

Later, Kevin decides to rescind the *Reported Time Batch Event* business process event. Workday:

- Removes the new time block that Kevin imported for 2019-02-08.
- Doesn't change the edited time block on 2019-02-04.
- Doesn't restore the deleted time block on 2019-02-07.

After Kevin rescinds, the time blocks display on the worker's time entry calendar as:

2019-02-04	2019-02-05	2019-02-06	2019-02-07	2019-02-08
8 hours				

Overlapping Time Blocks

When you import time blocks that overlap with existing time blocks, you must resolve the overlapping time blocks once they are in Workday. Correct the time blocks on the timesheet before submitting time.

Note: While the Worker Time Block Inbound Connector is still available, we recommend using the *Import Reported Time Blocks* web service for improved error handling and performance.

Related Information

Concepts

Concept: Import Web Service Pattern

Concept: Worker Time Block Inbound Connector

Reference

Reference: Time Tracking Web Services

Examples

Concept: Workday Web Services

Workday Community: Import Reported Time Blocks EIB - Inbound

Concept: Exporting Time Blocks

You can use the *Get Calculated Time Blocks* web service (secured to the *Process: Export Time Blocks* security domain) to export time blocks from Workday Time Tracking to third-party scheduling or payroll vendors. Once Workday exports the time blocks, you can use your third-party system to do things such as:

- Compare scheduled hours to worked hours.
- Forecast schedules based on historical time data.
- Pass time blocks to payroll for processing.

The *Get Calculated Time Blocks* web service exports calculated time blocks, rather than reported time blocks. Workday generates these time blocks when you run time calculations on the time blocks that workers report.

Use SOAP UI to prototype and test the *Get Calculated Time Blocks* web service, and to filter time blocks by these attributes:

- Date Range
- Status
- Supervisory Organization
- Workday ID
- Worker

Related Information

Reference

Reference: Time Tracking Web Services on page 2878

Examples

Concept: Workday Web Services

Concept: Enter Time by Period

Workday displays a period view on the time entry calendar that matches each worker's Time Tracking period schedule. This makes it easy for managers and workers to enter all time for a period at once. The period calendar view supports these period schedules:

- Weekly
- Biweekly
- Semimonthly
- Monthly

You can access the period calendar view on desktop on these reports:

- Enter My Time
- Enter Time for Worker

Workers can add time blocks by clicking a calendar day and can enter time for a week using:

- Auto-fill from Prior Week
- Auto-fill from Schedule
- Enter Time by Type
- Enter Time by Type (New!)
- Quick Add

You can configure the period calendar to be:

- An additional view with the classic calendar as the primary view.
- The primary view with the classic calendar as an additional view.
- The only view.

Related Information

Tasks

Set Up Time Entry Calendars on page 2679

Reference

FAQ: Enter Time by Period on page 2861

2024R2 Feature Release Note: Enter Time by Period

2024R1 What's New Post: Enter Time by Period

Concept: Daily Time Exceptions

When you use Workday Scheduling and Time Tracking, you can enable managers to view and act on daily time exceptions on their mobile devices using the:

- Attendance tab on the Team Schedule worklet.
- Today’s Attendance card on the mobile home page.

On the Attendance tab, Workday displays workers in these sections based on their schedule in Workday Scheduling:

- Checked In
- Not Checked In
- Not Checked Out

Managers can use their mobile devices to:

- Call or text workers.
- Edit time clock events for workers.
- Enter missing clock events for the workers.
- View lists of workers who are checked in, not checked in, or not checked out.
- View the time clock history.
- View the precise number of hours and minutes a worker is late or over.

Contacting Workers

Managers can text or call workers who have:

- Updated their work contact information in Workday.
- Set their work contact information to Public and Primary.

Matching Logic for Checked In

- Workday includes direct reports with shifts and time clock data for the day.
- When the worker checks in to a shift, they appear in the Checked In section.
- Workday displays a green tag when the worker checks in on or before their scheduled start time.
- We display a yellow tag when a worker checks in after their scheduled start time.
- Workday treats noncontiguous shifts as separate shifts.
- When a worker checks in, Workday matches the check-in to the closest start time of a shift.

Matching Logic for Not Checked In

- Workday includes direct reports with shifts and time clock data for the day.
- When 15 minutes pass without a check-in event for a shift, Workday adds the worker to the Not Checked In section.
- When the worker checks in to the shift, Workday removes the worker from the Not Checked In section.
- When a worker has multiple contiguous shifts (Example: 3:00-7:00 and 7:00-11:00):
    - Workday applies the first check-in to the entire day of shifts.
    - When a worker checks out after the first shift, they need to check back in for the second shift.
    - The worker can be late for the second shift, depending on the check-in time.
    - When a worker checks out after the second shift has begun, we assume that the worker has left early. Workday doesn't include them in the Not Checked In section for the second shift.

Matching Logic for Not Checked Out

- Workday includes direct reports with shifts and time clock data for the day.
- When 15 minutes pass without a check-out event for a shift that has a check-in event, Workday adds the worker to the Not Checked Out section.
- When a worker doesn't check in or out for a shift, Workday doesn't include them in the Not Checked Out section.
- When a worker has multiple contiguous shifts, Workday applies the first check-out to the entire day of shifts unless the worker checks back in from a shift.
- We ensure shifts stay in the Not Checked Out section for 24 hours after the shift ends.

Related Information

Concepts

Concept: Access to Worker Information on page 76

Tasks

Steps: Enable Time Tracking for Mobile on page 2645

Reference

2025R1 Feature Release Note: Connected Experience: Daily Time Exceptions

2024R2 Feature Release Note: Connected Experience: Daily Time Exceptions for Managers

Concept: Auto-Fill Time by Schedule Service Step

You can add the *Auto-fill Time by Schedule* service step to the *Hire* business process to automatically populate the time blocks for new hires if they begin after the Mass Autofill from Schedule process runs for a week. The service step fills in time blocks from the worker's Hire Date through the end of their first week.

In order for Workday to populate time blocks, the worker must be:

- Eligible for a time entry template with the Auto-fill from Schedule option enabled.
- Eligible for a time entry template included in a scheduled Mass Autofill from Schedule run within the 6 days following the worker's hire date.

The service step will populate scheduled hours based on the week in which the hire date falls. The week is based on the Start Day of Week on the worker's work schedule calendar.

- If the worker is hired in the current week, scheduled hours will be populated from the hire date until the last day of the week.
- If the worker is hired with an effective date in the past, scheduled hours will be populated in the current week.
- If the worker is hired with an effective date in the future, scheduled hours will be populated from the hire date until the last day of that week.

If the week to be populated includes a holiday (based on the holiday calendar) Workday populates hours for the holiday.

You can add a step delay to the service step so it doesn't run until the worker's hire date.

Related Information

Tasks

Mass Auto-Fill from Schedule on page 2850

References: Entering and Correcting Time

Reference: Time Block and Time Clock Event Sources

You can report on the source of time entries using the Source report field and the Time Clock Event Source report field. You can view the Source when you click the View Details button on a time block. You can also view both fields on the Time Block Audit report.

If a time block is entered as a quantity, the Source report field will indicate one of 8 possible values depending on the time entry method used:

- Adjusted
- External
- Manually Added
- Mass Auto-fill from Schedule
- Mass Enter Time
- Mobile
- System Generated
- User Entered

If a time block is formed from 2 matched time clock events it will have 2 possible Source values: Time Clock Events and Time Clock Events (Mobile). The source Workday displays is determined by the source of the second time clock event. When the second time clock event has a Time Clock (Mobile) source, the time block source is Time Clock Events (Mobile). When the second time clock event has a non-mobile source, the time block source is Time Clock Events.

In time clock events the Source report field will indicate one of 4 possible values depending on the time entry method used:

- Time Clock
- External
- Time Clock(Mobile)
- Manually Added

Time clock event Source report fields are separate from time block Source report fields. For reporting purposes there is only 1 Source field that can be used by both time clock events and time blocks. These are the possible values that Workday returns in the Source report field:

Source	Description
Adjusted	A time block added through the Adjust Calculated Time task.
External	A time block or a time clock event loaded into Workday through an integration.
Manually Added	A time clock event generated through the Adjust Calculated Time task or the Add Clock Event task.
Mass Auto-fill from Schedule	A time block added through the Mass Autofill from Schedule task.
Mass Enter Time	A time block added through the Mass Enter Time task.
Mobile	A time block created through the Workday mobile application.
System Generated	A time block created through calculations. Example: A time block create calculation.
Time Clock	A time clock event created through the check in or check out time entry method using Workday on desktop (through the task or worklet).
Time Clock (Mobile)	A time clock event created through the check in or check out time entry method on the Workday mobile application.
Time Clock Events	A time block with a second event created outside of the Workday mobile application.
Time Clock Events (Mobile)	A time block with a second event created on the Workday mobile application from clocking in and out.
User Entered	A time block entered through a time entry method in Workday. Example: Enter Time calendar.

These are the possible values that Workday returns in the Time Clock Event Source field:

Time Clock Event Source	Description
Time Clock	A check-in or check-out clock event created through the web.
External	A time clock event created through an external time collection system and loaded into Workday.

Time Clock (Mobile)	A time clock event created through the check-in and check-out on the Workday mobile application.
Manually Added	A time clock event created through the Time Clock History report or the My Time Clock History report.

These are the possible permutations of In and Out Time Clock Event Source fields and the resulting value Workday returns in the time block Source field.

Time Clock Event Source In	Time Clock Event Source Out	Time Block Source
Time Clock	Time Clock	Time Clock Events
Time Clock	External	Time Clock Events
Time Clock	Time Clock(Mobile)	Time Clock Events (Mobile)
Time Clock	Manually Added	Time Clock Events
External	Time Clock	Time Clock Events
External	External	Time Clock Events
External	Time Clock(Mobile)	Time Clock Events (Mobile)
External	Manually Added	Time Clock Events
Time Clock(Mobile)	Time Clock	Time Clock Events
Time Clock(Mobile)	External	Time Clock Events
Time Clock(Mobile)	Time Clock(Mobile)	Time Clock Events (Mobile)
Time Clock(Mobile)	Manually Added	Time Clock Events
Manually Added	Time Clock	Time Clock Events
Manually Added	External	Time Clock Events
Manually Added	Time Clock(Mobile)	Time Clock Events (Mobile)
Manually Added	Manually Added	Time Clock Events

Reference: Time Clock Event Security

You can modify security for time clock-related tasks using these domains:

Domains	Notes
Self-Service: Time Clock	Enables workers to check in and check out in Time Tracking and on mobile.
Self-Service: Add Time Clock Events *Worker Data: Add Time Clock Events*	Enables users to edit the details of existing time clock events. *Worker Data: Add Time Clock Events* includes permission to edit the date and time of time clock events, but *Self-Service: Add Time Clock Events* doesn't.
Self-Service: View/Edit Time Clock Events *Worker Data: View/Edit Time Clock Events*	Select Modify on the domain's security policy to enable workers to edit time clock event details, not including date and time.
Self-Service: Match Clock Events *Worker Data: Match Clock Events*	When using deferred time clock event processing, enables users to match pending clock events for an individual worker.

Domains	Notes
Time Tracking: Edit Time Clock Event Date and Time	Enables timekeepers or administrators to edit the date and time of matched time clock events. To access this domain, users must also have access to *Worker Data: View/Edit Time Clock Events*. The Employee Self-Service (ESS) security group can't edit the date and time of time clock events.
Self-Service: Delete Time Clock Events *Worker Data: Delete Time Clock Events*	Enables users to delete time clock events.
Process: Time Clock Event Processing	Enables users to schedule the process that matches pending time clock events.

Related Information

Concepts

Concept: Time Clock Events on page 2863

Manage Time Clock Events on page 2856

Reference: Time Entry Options

Time Tracking provides a number of options that workers can use to enter time. The available options for workers depend on time entry configurations, business process security policies, and whether the workers are using calendar-based time entry or high volume time entry.

Option	Description
Auto-fill from Prior Week	Copy time blocks from 1 of the 5 preceding weeks into the current week. This option is useful for workers who enter time or project time on a weekly basis and enter similar time from week to week. Workday: • Copies project time. • Copies details, such as active worktags, override rates, calculation tags, and comments. • Doesn't copy time blocks with an inactive time entry code or a code the worker no longer qualifies for.
Auto-fill from Schedule	Copy scheduled hours from a worker's work schedule calendar using the default time entry code. You can specify which days to copy. The default time entry code controls whether Workday autofills schedules as in/out times or hours only. For in/out times, Workday only fills out types of *Out* (not *Meal* or *Break*). If a worker has multiple jobs, Workday fills the work schedule for the worker's primary job. Conditions for using this option: • Workers are logging time in hours, not days. • Workers must have a work schedule calendar.

Option	Description
	• You haven't enabled project tracking for the time entry template.
Clear	Clear all time entries for the week, including time off entered using the Time Type prompt. This action doesn't clear any time off entries you entered using the Enter Time Off task. Note: This option is only available if every day in the week is unlocked for the user accessing the Clear task.
Enter Time	Manually enter or update individual time entries using Micro-edit. Employees who can use Time Tracking to enter time and who also have access to Workday Assistant chatbot can verbally enter time for the current day.
Enter Time by Week	Enter time for an entire week within a single grid. This option is useful for workers who: • Enter time weekly but don't enter project time. • Want to update time that was entered using another time entry method. This option uses the same interface as high volume time entry but is accessible from the time entry calendar.
Enter Time Weekly	A weekly grid view of the time entry calendar with a tab for each day. You can configure this option on the Enter Time business process security policy. The initiating action is called Enter Time with this description: *Open a daily time entry grid to enter time day-by-day*. Note: Workday plans to deprecate this option in a future update.
Enter Time Off	Access the Enter Time Off task directly from the time entry calendar. Time off displays on the calendar after you submit it (but not when saved for later). Note: Enter Time Off is accessible only if the *Request Time Off* business process has security groups defined for the initiating action of *Enter Time Off*, with the description: *Enter Time Off on behalf of a worker from the time entry calendar (Time Tracking Only)*. Workday doesn’t support start and end times when entering time off using absence tables.
Quick Add	Add time blocks with the same details for multiple days at once. Example: If you work every day from 09:00 to 12:00 but your afternoon hours

Option	Description
	vary, Quick Add is a good option for reporting your morning hours all at once.
Enter Time by Type	Enter time for multiple time types at once for an entire week. This option is useful for workers who: • Enter project-based time. • Often use worktags or positions for time entry. Enter Time by Type isn't available for time entry codes that use In and Out times.
Run Calculations	Manually order Workday to run calculations for the week.

Conditions That Apply to Both Auto-Fill Options

- Workers can edit autofilled entries.
- Workday:
  - Clears existing time blocks for the current week (excluding time off entries).
  - Runs calculations and validations after copying time blocks.
- Workday doesn't:
  - Delete time off entries entered for the current week.
  - Autofill time off entries.
  - Autofill locked days where the worker isn't active.
  - Display the autofill option for a locked work week.

Security for Time Entry Options

To use any of the time entry options, you must:

- Enable the appropriate security on the *Enter Time* business security policy.
- Enable the option on the time entry template for the worker, if applicable.

Related Information

Concepts

Concept: Enter Time Business Process on page 2669

Tasks

Steps: Create Time Entry Templates on page 2672

Reference: Time Tracking Web Services

Time Clock Event Web Services

Web Service	Description	Security
Import Time Clock Events	Use to import large batches of 1,000 or more time clock events on an infrequent basis.	*Process: Time Clock Integration* domain in the Time Tracking functional area.
Put Time Clock Events	Use to import small batches of time clock events from a third-party system in near real time.	*Process: Time Clock Integration* domain in the Time Tracking functional area.

Time Block Web Services

Web Service	Description	Security
Get Calculated Time Blocks	Use to export calculated time blocks from Workday Time Tracking to a third-party scheduling or payroll vendor.	*Process: Export Time Blocks* domain in the Time Tracking functional area.
Import Reported Time Blocks	Use to import reported time blocks into Workday Time Tracking.	*Process: Import Time Blocks* domain in the Time Tracking functional area.

Work Schedule Web Services

Web Service	Description	Security
Assign Work Schedule	Use to integrate changes to a work schedule from a third-party scheduling system, spreadsheet, or file.	*Assign Work Schedule* business process security policy in the Time Tracking and Time Off and Leave functional areas.
Import Ad Hoc Schedules	Use to import schedule blocks from a third-party scheduling vendor into Workday Time Tracking.	*Process: Ad Hoc Schedule Processing* domain in the Time Tracking functional area.

Related Information
Concepts
Concept: Workday Web Services
Concept: Importing Time Clock Events on page 2865
Concept: Importing Reported Time Blocks on page 2867
Concept: Exporting Time Blocks on page 2870
Concept: Importing Work Schedules

Reviewing and Approving Time

Setup Considerations: Review Time and Project Time

You can use this topic to help make decisions when planning your configuration and use of the Review Time and Review Project Time reports. 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

Workday delivers 2 configurable reports that you can set up to enable managers to review and approve time in a consolidated view:

- The Review Time report is for managers or timekeepers who belong to the same supervisory organization as the workers on their project. Reviewers can use this report to review and approve project and nonproject time entries and time offs.
- The Review Project Time report is for project managers who approve time for the workers on their project, but who aren't in their supervisory organization. Project managers can only use this report to review and approve project time.

Business Benefits

When you grant managers access to the Review Time and Review Project Time reports, they can:

- Save time by approving multiple time entries at once rather than approving each entry one-by-one in My Tasks.
- View additional details about time entries that are eligible or ineligible for approval.
- Gain context about a worker's time by viewing their daily and weekly time entry totals, time block details, and comments.
- Approve workers' time entries by week or by period.

Use Cases

Review Time

- Managers or timekeepers need to approve time entries or time offs for multiple workers at once.
- Project managers are in the same supervisory organization as the workers on their projects.

Review Project Time

- Project managers in your organization need to review and approve time for multiple workers at once.
- Your organization includes project managers who only approve project time entries for the workers on their projects.
- Project managers are in a different supervisory organization from the workers in their projects.

Questions to Consider

Which report should I grant workers access to?

Decide which report to enable based on the time approver's relationship to the workers.

Role	Reviewing and Approving	Report
• Timekeeper • Manager • Project manager who belongs to the same supervisory organization as the workers they're approving time for.	• Project time entries. • Nonproject time entries. • Time offs.	Review Time
• Project Manager • Project manager who belongs to a different supervisory organization from the workers they're approving time for.	• Project time entries.	Review Project Time

Recommendations

To reduce confusion, we recommend that you enable managers to use either the Review Time report or the Review Project Time report, but not both.

As you create training materials for managers about using the Review Project Time report, we recommend that you include these considerations:

- You can save filters on the Review Project Time filter page to quickly run the report with the same filters.
- Saved filters continue to populate the same date that you entered the first time you ran the task. Update the Date field to the relevant date when you run the task again.

Requirements

The Review Project Time report displays time entries based on time calculation tags. If you've never enabled time calculation tags before, you must create them to use the Review Project Time report. Create a Project Time calculation tag that is applied to all project time entries. You don’t need to create calculations or calculation groups.

Enable Create Independent Events on relevant time entry templates so that Workday creates separate approval events for each project when workers enter time against multiple projects.

Limitations

No impact.

Tenant Setup

You can configure tenant-wide settings that control what the reports display using these tasks:

- Edit Time Approval Template
- Edit Project Time Approval Settings

Security

Review Time

Security Domain	Considerations
Manager: Time Tracking Manager Approval	Secures the Review Time report. Grant managers access to this domain.
Set Up: Time Tracking	Secures the Edit Time Approval Template task that you can use to configure the Review Time report. Administrators should have access to this domain.

Review Project Time

Security Domain	Considerations
Project Manager: Time Tracking Project Manager Approval	Secures the Review Project Time report. Grant project managers access to this domain.
Set Up: Time Tracking	Secures the Edit Project Time Approval Settings task that you can use to configure the Review Time report. Administrators should have access to this domain.

Business Processes

Configure the *Enter Time* business process to route time entries to the project manager for approval.

Reporting

No impact.

Integrations

No impact.

Connections and Touchpoints

Features	Considerations
Workday Projects	Workers display in the Review Project Time report when they're assigned as resources on the same resource plan as the project manager.

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.

Related Information
Concepts
Concept: Enter Time Business Process on page 2669
Concept: Project Time Entry on page 2700
Steps: Set Up Project Time Entry on page 2689
Preconfigured Content: HCM Delivered Configurations

Set Up the Review Time Report

Prerequisites

- Create time calculation tags.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

The Review Time report is a configurable report that enables managers or timekeepers to review and approve time for multiple workers at once. From the report, you can select a worker's name to view additional time entry data as well as absence balances. You can use the Review Time report as an alternative to My Tasks.

Note: The Workers prompt is limited to 1,500 workers. When your search results exceed this limit, the prompt displays an error: Error: Too many results. Refine search to narrow results. To prevent this error, refine your search criteria.

Steps

1. Access the Edit Time Approval Template task.

   To use 1 template, configure additional settings on the Global Time Approval Template. To enable time approvers in different countries to review different time totals, create multiple templates.

   As you complete the task, consider:

Option	Description
Review Time by Period	Select to enable approvers to review and approve time for nonweekly periods. Workday displays a Period Schedule prompt on the report that approvers can use to select

Option	Description
	a period schedule. The report displays all workers who are eligible for the selected period schedule. Reviewers should select a Period Schedule, rather than running the report without selecting one. When you select Review Time by Period, Workday doesn't display the Start Day of Week prompt.
Start Day of Week	Select the day that begins the week to approve. When managers review time by week, they can only approve time for workers with the same Start Day of Week. Managers can see hours for direct reports whose work week begins on a different day, but they can't use the report to approve the hours.
Worked Hours Calculation Tags	Select tags that identify worked time. These tags determine which hours display in the Submitted Time, Unsubmitted Time, and Approved Time columns in the report.

2. (Optional) On the Default Worker Filters tab, select additional search fields to display on the report:

    - Show Employee Type
    - Show Worker Type
    - Show Pay Rate Type
    - Show Job Exempt Status

    You can add values that automatically populate in the search fields you've added. To add filters to the report that approvers can't modify, add values without selecting the check box to display the field in the report. Workday applies an implicit filter to the report according to the values that you've entered.
3. (Optional) On the Time Summary tab, add the total columns you want to include in reports.

    - You can create more than 12 totals, but managers can only see 12 totals.
    - To display the total time employees actually reported to time approvers, increase the number of totals shown, and display only those columns where there's a value.

Option	Description
Order	Columns display in Review Time in numerical order from left to right starting with *Total 1*.
Title	To avoid confusion, include the type of unit in the column title. Example: Holiday Time (Days).
Calculation Tags	Select 1 or more calculation tags. Ensure that the calculation tags you select for each column use the same units. The sum of the time blocks with those tags will display in the column.
Always shown when 0	When checked, enables time approvers to see zero in the totals row.

Option	Description
	Example: If you always want to display an overtime total to the time approver, regardless of whether a worker has worked overtime: • Create an overtime row. • Select Always shown when 0 on the overtime total row.

4. (Optional) Select these options to display additional information in the report:

Option	Description
Include Warning Indicators	Displays: • An indicator in the Unsubmitted Hours column when the worker has unsubmitted time. • An indicator in the Hours to Approve column when the worker has time irregularities that might need attention. • A Workers with Alerts filter.
Include Count of Incomplete Time Entries	Displays the total number of incomplete time entries for the worker.
Include Scheduled Weekly Hours	Displays the worker's scheduled hours from their job profile.
Enable Workday Scheduling	Select to enable Workday to use data from Workday Scheduling in the report.
Include Time Anomalies	Select to enable Workday to display time anomalies in the report. 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.
Minimum Time Anomaly Confidence Level	Controls the minimum confidence level that a time anomaly must meet for Workday to display it. The confidence level is: • Low when it corresponds to 50 to 80 percent. • Medium when it corresponds to 80 to 90 percent. • High when it corresponds to 90 to 100 percent. Example: You set the value to Low. Workday then displays time blocks that have a Low, Medium, and High anomaly confidence level.
Include In/Out Comments	Displays the check-in and check-out comments from the worker's time clock events.

Option	Description
	Workday automatically displays the worker's time block comments.

5. On the Eligibility tab, from the Country prompt, select the countries where managers or administrators will be running the report. When their country isn't included in a template, the report runs with the Global Time Approval Template.
6. Add reviewers to the *Manager: Time Tracking Manager Approval* domain.
7. Authorize reviewers to approve or manually advance the approval step on the *Enter Time* business process.

Next Steps

If you approve time entries after running a payroll calculation, use the Run Pay Calculation task. Select Smart Calculation or Smart Calculation Based on Events.

Access the All Time Approval Templates report to view all time approval templates.

Related Information
Concepts
Concept: Time Anomalies on page 2906
Troubleshooting: Review Time Report on page 2913

Set Up the Review Project Time Report

Prerequisites

- Set up project time entry, including calculation tags.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

The Review Project Time report enables project managers to review and approve time for multiple project workers at once as an alternative to My Tasks. This report displays workers based on their role on a project hierarchy, rather than based on their membership in a supervisory organization. Therefore, the report enables project managers to review time for workers in their projects even though the workers are outside the project manager's own supervisory organization.

Steps

1. Access the Edit Project Time Approval Settings task.

   As you complete the task, consider:

Option	Description
Review Time by Period	Select to enable approvers to review and approve time for nonweekly periods. Workday displays a Period Schedule prompt on the report that approvers can use to select a period schedule. The report displays all workers who are eligible for the selected period schedule. Reviewers should select a Period Schedule, rather than running the report without selecting one.

Option	Description
	When you select Review Time by Period, Workday doesn't display the Start Day of Week prompt.
Start Day of Week	Select the day that begins the week to approve. When you review time by week, you can only approve time for workers whose work week begins on the same day as the Start Day of Week. You can still see hours for workers whose work week begins on a different day, but you can't use the report to approve the hours.
Worked Hours Calculation Tags	Select tags that identify worked time. These tags determine which hours display in the Submitted Time, Unsubmitted Time, and Approved Time columns in the report.
Default Worker Filters	(Optional) Select Show Employee Type, Show Worker Type, Show Pay Rate Type, or Show Job Exempt Status to display additional search fields on the report. Add values that automatically populate in the search fields you've added. To add filters to the report that approvers can't modify, add values without selecting the check box to display the field in the report. Workday applies an implicit filter to the report according to the values that you've entered.

2. (Optional) On the Time Summary tab, select Show Billable and Non-Billable to display additional Billable and Non-Billable columns in the report.
3. (Optional) Add up to 12 additional breakdown columns to the report.

Option	Description
Column	Columns display in numerical order from left to right starting with *Total 1*.
Title	Include the type of unit in the column title to avoid confusion. Example: Holiday Time (Days).
Calculation Tags	Select 1 or more calculation tags. Ensure that the calculation tags you select for each column use the same units. The sum of the time blocks with those tags will display in the column.

4. Add reviewers to the *Project Manager: Time Tracking Project Manager Approval* domain.
5. Authorize project managers to approve or manually advance the approval step on the *Enter Time* business process.

Next Steps

If you approve time entries after running a payroll calculation, use the Run Pay Calculation task. Select Smart Calculation or Smart Calculation Based on Events.

Related Information

Concepts

Steps: Set Up Project Time Entry on page 2689

Steps: Set Up Machine Learning for Time Anomalies

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

- Deploy Workday Time Tracking. We recommend you deploy Time Tracking at least 1 year before implementing time anomaly detection.
- Create time approval templates.

Context

You can enable Workday to use machine learning to detect atypical time entries so that you can:

- Create custom reports to view time anomaly scores and top time anomaly reasons for time blocks.
- Access the Time Anomaly Trends report to view time anomaly trends by supervisory organization.
- Enable managers and timekeepers to see and take action on time anomalies within the Review Time report.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   On the Innovation Services and Data Selection Opt-In report, select the HCM: Workforce Management Machine Learning Services section.

   Note: To build a machine learning model that can detect time anomalies, you must opt in to all of these categories:

   - Time Configuration Data
   - Worker Data
   - Historical Schedule Block Data
   - Worker Time and Absence Data

   You can also opt into User Feature Delivery Data to help Workday detect time anomalies.

   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.
2. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality..

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.
3. (Optional) Access the Edit Time Approval Template task.

   Select the Include Time Anomalies check box to display time anomalies in the Review Time report.

   Security: *Set Up: Time Tracking* in the Time Tracking functional area.

Next Steps

We recommend that you train the machine learning model in the Production tenant for at least 3 weeks. When you train in a Production tenant, you ensure that the model has a constant stream of real data to train on so that it can learn patterns of acceptable and unacceptable time blocks.

If you need to test in a nonproduction tenant, you can enable time anomaly detection in Implementation tenants. If you began testing in an Implementation tenant before 2024-10-04, you now need to enable on-demand data extraction to continue regular data extraction.

Related Information

Concepts

Concept: Time Anomalies on page 2906

Workday Community: Time Anomalies

The Next Level: Time Anomalies

Test Time Anomalies in Implementation Tenants

Prerequisites

- Enable Workday to use machine learning to detect atypical time entries in an Implementation tenant.

  See Steps: Set Up Machine Learning for Time Anomalies on page 2887.
- Security: *Manage: Innovation Services* domain in the Innovation Services functional area.

Context

You can test time anomaly detection in an Implementation tenant.

Note: If you began testing in an Implementation tenant before 2024-10-04, you must now enable on-demand data extraction to continue extracting data.

Steps

1. Access the Run On-Demand Machine Learning Activation for Implementation Tenant task.
2. In the HCM: HCM: Workforce Management Machine Learning Services innovation service row, select Confirm Run.

Result

Workday immediately extracts data and sets up weekly data extractions. Workday uses this extracted data to train the machine learning model. To generate time anomalies in the Implementation tenant, where live data is not available, you need to submit and either approve or deny time blocks.

Next Steps

Monitor the results in the Time Anomaly Trends report.
Related Information
Concepts

Concept: Time Anomalies on page 2906

Set Up Scheduled vs. Actuals Reporting

Prerequisites

Security: These domains in the Time Tracking functional area:

- *Set Up: Time Tracking*
- *Worker Data: Reports*
- *Worker Data: Work Schedule*

Context

You can configure the View Scheduled vs. Actual Hours for Workers report so that managers and timekeepers can analyze the difference between workers' scheduled hours and the actual hours they worked. Managers can use the report to identify gaps in scheduling, allocate resources properly, and report on schedule accuracy to minimize labor inefficiencies.

Workday calculates the variance between scheduled hours and actual hours using this formula:

Actual hours - scheduled hours + time off hours (or time off days multiplied by scheduled hours for time off plans in days).

Example: A worker was scheduled to work for 8 hours. They worked 4 hours and took 4 hours of time off.

4 hours (worked) - *8* hours (scheduled) + 4 hours (time off) = *0* hour variance.

The actual hours include calculated time adjustments made through the Adjust Calculated Time task.

On the View Scheduled vs. Actual Hours for Workers report, Workday:

- Dates time blocks according to the reported date at the beginning of the time block.
- Doesn't include workers on days they're on leave.
- Evaluates time blocks according to the reported date at the beginning of the time block.
- Only includes time from the In/Out time entry method. The report doesn't display time entered through the Hours Only time entry method.

When workers enter time off in both days and hours on the same day, Workday displays time off in days in the Time Off Quantity columns. The report includes time off hours and days only in the worker rows and not in the daily variance total at the top of the page.

Steps

1. Access the Edit Scheduled vs. Actuals Settings task. As you complete the task, consider:

Option	Description
Actual Hours Calculation Tags to Exclude	Exclude time blocks with certain calculation tags from displaying in the Actual Hours value in the report. Example: You want to compare scheduled and actual hours, but don't want to include holiday hours. Select the *Holiday Time* calculation tag.
Pay Rate Types to Exclude	Exclude workers with certain pay rate types from appearing in the report.
Job Exempt Status	Define the job status to limit which workers to include in the report.

2. In the Analytic Indicator Configuration section, you can configure values that control whether Workday displays critical icons, warning icons, or both on the report.

   In the Critical and Warning fields, you can enter a value greater than or equal to zero. Workday applies the threshold values as absolute values. Therefore, the analytic indicators will display whether actual hours and time off are greater than or less than scheduled hours.

   Example: You enter 2.5 as the Critical value. Workday will display a critical icon for a worker who works at least 2.5 hours more than or less than their scheduled hours.

Result

Managers and timekeepers can access the View Scheduled vs. Actual Hours for Workers report. This report is for frontline managers, so the Supervisory Organization prompt returns only the organizations managed by the person running the report. Timekeepers who do not manage any organizations can run the report by manually entering the organizations that they have access to.

When workers are assigned to more than 1 work schedule calendar and 1 of their work schedule calendars is inactivated, the newly assigned work schedule calendar will override all scheduled hours from the time the previous work schedule calendar was inactivated. Ensure that workers are only assigned 1 work schedule calendar at a time.

Example

To configure the report to exclude breaks from workers' actual hours, from the Actual Hours Calculation Tags to Exclude prompt, select *Break*.

Next Steps

Add a menu to the Time and Absence dashboard, and add the View Scheduled vs. Actual Hours for Workers report as a task link. See Add Dashboard Menus.

Steps: Report on Time Across Supervisory Organizations

Context

You can configure security and create custom reports so time reviewers can report on time for workers outside their supervisory organization. You can enable reporting for reviewers such as project, location, or cost center managers.

Steps

1. Create Role-Based Security Groups.

   Workday recommends that you use constrained, role-based security groups for the assignable roles reporting on project time.

   In the Group Criteria section, select the Assignable Role.
2. Maintain Security Group Permissions.

   Grant the security group access to these domains:

   - *Manage: Project Plan* (Only for project time reporting).
   - *Reports: Time Tracking*.
3. Create Custom Reports.

   Create custom reports on the All Time Blocks report data source (RDS) using RDS filters. Select one of these filters based on the needs of the reviewer:

   - *Reported Time Blocks for Projects/Project Hierarchies*
   - *Reported Time Blocks for Projects/Project Hierarchies and Company*
   - *All Time Blocks for Workers by Cost Center*
   - *All Time Blocks for Workers by Location*

   Cost center and location managers who use these RDS filters will be able to view all time blocks for the workers. They'll also be able to see time worked for different cost centers or location hierarchies.

   Note: If you create reports with other filters, users (such as managers) must belong to an unconstrained security group to view time for workers outside their organization.

Run Custom Time Tracking Reports with Data Source Filters

Prerequisites

- Create Custom Reports. Create custom reports built off any of these data sources:
  - Schedule Blocks
  - Time Day
  - Time Week
  - Time Month
  - Time Exceptions for a Period
- Security: *Reports: Time Tracking* domain in the Time Tracking or Time Tracking Hub functional area.

Context

When you run custom Time Tracking reports, Workday gathers data from multiple sources for all active workers. Filtering this data before running reports is more efficient than filtering it afterwards.

Steps

1. Access the Run Custom Report task.
2. Run the custom Time Tracking report.
3. Set up data source filtering. As you complete the task, consider:

Option	Description
Exclude workers who have never entered time or time off	When you have many workers who don’t report time or time off, limit the report to display only workers who do.
Exclude Scheduling Data	When you include scheduling data, Workday checks for eligibility for work schedule

Option	Description
	calendars while running the report. Improve performance by excluding scheduling data when you don't want to report on it.
Workers	Select a subset of workers by choosing the workers individually. You can select active, inactive, and terminated workers.
Locations	Select all workers at a specific location.
Job Profiles	Select workers by job family or job profile.

Result

The report will include all workers who match any of the filter categories you selected.

Example

This example illustrates how you can filter data sources when running a Time Tracking report.

Field	Value
Exclude workers who have never entered time or time off	Yes
Exclude Scheduling Data	Yes
Workers	*Betty Liu*
Job Profiles	*Accountant*
Locations	*San Francisco*

If these workers have entered time or time off, the report will include Betty Liu, all accountants, and all workers in San Francisco.

Steps: Set Up Time Tracking Notifications

Context

Create and send notifications to groups of employees who have:

- Unmatched time clock events.
- No time entries.
- Unapproved time review events.
- Unsubmitted time entries.

You can send notifications according to a notification schedule and can report on workers who have taken action.

Steps

1. (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 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. Custom time periods enable you to set periods of up to 100 days or 3 months, looking either forward or backward in time.

Example: You can create a custom time period that Workday uses to look back by 10 days from the date of the notification to correct unmatched time clock events.

Security: *Administer Scheduled Distributions* domain in the System functional area.

2. Copy Reports.
    a) Copy and modify these reports:
        - Unmatched Time Clock Events by Worker
        - Workers with No Time Entry
        - Workers with Unapproved Time Review Events
        - Workers with Unsubmitted Time

        Workday bases the Start Date, End Date, and Time Period fields on the creation date of the time blocks or time review events.
    b) Access the Share tab of the copied report.

        Add the time tracking administrator to the Authorized Groups or Authorized Users.
3. Run the custom time tracking reports.

    Enter a Time Period.
4. Access the Edit Tenant Setup - Notifications task.

    Workday mutes email and mobile push notifications for the routing rule by default.
    a) In the Notification Delivery Settings section, select Time Tracking.
    b) From the Rule prompt, select *Create Notification Routing Rule*.

        See Create Notification Routing Rules.

    See Concept: Notifications.

    Security: *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.
5. Access the Create Scheduled Distribution task.

    You can create and send notifications to employees identified in the custom reports.

    Security: *Administer Scheduled Distributions* domain in the System functional area.

    As you complete the task, consider:

Option	Description
Content Type	• Send the Review Time task to reviewers who have time review events pending their approval. • Select *Enter Time* to send the Enter My Time task to workers who have unsubmitted time entries, unmatched time clock events, or no time entries. • Select *Worker Notifications* to distribute notifications without linking to a task.
Content	Select the period of time from the notification launch date that you want to include in the search. Use the same time period that you selected when you ran your custom time tracking reports. Scheduled distributions don't expire, so you don't need to relaunch or reconfigure them. • *Last 14 Days* to search minus 14 days from the date that you send out the notification.

Option	Description
	• *Last 7 Days* to search minus 7 days from the date that you send out the notification. • *This Month* to search from the first day of the month until the date that you send out the notification.
Type	Select the audience for your report from an organization or from a custom report. When you use a custom report, in the Report Criteria grid, select the same time period you selected for Content.
Selection	Select a report from the time tracking custom reports that you created and ran.
Channels	Select the notification channels.
Message	Enter the message that you want to include in your notification. You can include links in your message.
Run Frequency	Select the frequency for sending the distribution.

Next Steps

(Optional) Run the Distribution Records report to validate which recipients took action on the notification.

Related Information
Tasks

Steps: Schedule Worker Communication Notifications

Schedule a Notification to Send in the Future

Set Up the Edit and Approve Time Report

Prerequisites

- Create time calculation tags.
- Security: *Set Up: Time Tracking* domain in the Time Tracking functional area.

Context

The Edit and Approve Time report is a configurable report that enables managers or timekeepers to review, edit, submit, and approve time for all their workers in a consolidated view. From the report, you can select a worker's name to view summary totals and validations. You can use the Edit and Approve Time report as an alternative to My Tasks .

The Edit and Approve Time report totals each day by hours. When you track time by days, Workday doesn't show values in the Summary section.

Steps

1. Access the Edit Time Approval Template task.

   Complete the task:

Option	Description
Review Time by Period	Select to enable approvers to review and approve time for nonweekly periods. Workday displays a View Options prompt on the report that approvers can use to select a weekly or period schedule. The report displays all workers who are eligible for the selected schedule. For period schedules, reviewers must select the period schedule they want to view. When reviewers select Review Time by Period, Workday doesn't display the Start Day of Week prompt.
Start Day of Week	When you enable only the weekly view, select the day that begins the week to approve. When managers review time by week, they can only approve time for workers with the same Start Day of Week. Managers can see hours for direct reports whose work week begins on a different day, but they can't use the report to approve the hours.

2. (Optional) On the Default Worker Filters tab, select additional search fields to display on the report:

   - Show Employee Type
   - Show Worker Type
   - Show Pay Rate Type
   - Show Job Exempt Status

   You can add values that automatically populate in the search fields you've added. To add filters to the report that approvers can't modify, add values without selecting the check box to display the field in the report. Workday applies an implicit filter to the report according to the values that you've entered.
3. (Optional) Complete the Edit and Approve Time tab:

Option	Description
Collapse Top Summary Cards	Select when you want the summary card at the top of the report to be collapsed by default.
Don't Display Scheduling Data	Select when you don't want to include scheduling data from Workday Scheduling or the work schedule calendar. Clear the check box to display: • Scheduled in and out times on each calendar day. • Total scheduled hours for the period in each worker row. For workers who have time entry templates with the Enable Workday Scheduling check

Option	Description
	box selected, we display Workday Scheduling data on the Edit and Approve Time report. For all other workers, we display scheduling data from the work schedule calendar.
Disable Autofill	Select to disable the autofilling of out times on unmatched time clock events and incomplete time blocks. When you don't disable autofill, Workday displays check-ins with their matching out times from workers' schedules.

4. On the Eligibility tab, from the Country prompt, select the countries where managers or administrators will be running the report. When their country isn't included in a template, the report runs with the Global Time Approval Template.
5. (Optional) If your managers submit time by period, approve time by period, or both submit and approve by period, access the Edit Time Entry Template task.

   On the Noneffective-Dated tab, expand the Business Process section. Select Submit by Time Period.
6. Add reviewers to the *Manager: Time Tracking Manager Edit and Approve* domain.

Next Steps

If you approve time entries after running a payroll calculation, use the Run Pay Calculation task. Select Smart Calculation or Smart Calculation Based on Events.

Related Information
Concepts
2025R2 Feature Release Note: Display Scheduling Data on the Edit and Approve Time Report

Mass Approve Time

Prerequisites

Security:

- *Custom Report Creation* domain in the System functional area.
- *Business Process Administration* domain in the System functional area.

Context

You can use the Mass Operation Management task to mass advance time review events (*Enter Time* business process events that need approval). This task reduces the need for approvers to review each event.

Note: We recommend using Mass Operation Management for improved performance and usability. However, you can also use the Mass Advance Business Process task to advance an event for an individual worker.

Steps

1. Access the Create Custom Report task.

   Create a custom report that generates a list of time review events that need approval. At minimum, the report must:

   - Be *Advanced* or *Simple*.
   - Use the *All Time Review Events* data source.
   - Use the *Mass Advance Criteria for Time Period* data source filter.
   - Contain a filter with an AND condition setting the Manually Advanceable report field to a value of Yes.
   - Return fewer than 50,000 time review events.
2. Access the Mass Operation Management task. As you complete the task, consider:

Option	Description
Mass Operation Type	Select *Advance Business Process*.
Input Report	Select the custom report you created earlier.
Run Frequency	Select a run frequency.
3. Select the Send to Completion check box to ensure that you complete all approvals.

   If you don't select this check box, Workday advances the business processes only 1 step forward. Not selecting the check box can result in incomplete time review events if your *Enter Time* business processes have more than 1 step after initiation.
4. Select the Enter Time process to get to the correct fields.

Result

When the process completes successfully, Workday approves all time review events.

Next Steps

If you've approved time entries after running a payroll calculation, use the Run Pay Calculation task and select either Smart Calculation or Smart Calculation Based on Events.

Related Information

Concepts

Concept: Business Process Management

Set Up Mass Operations

The Next Level: Time Tracking Advanced Concepts

Steps: Set Up Attendance Management

Prerequisites

Security: These domains in the Time Tracking functional area:

- *Reports: Time Tracking*
- *Set Up: Time Attendance*

Context

You can define attendance alerts for your organization and use a points system to encourage attendance policy compliance. You can associate attendance events with points and give managers the ability to justify attendance infractions or override points when needed. Workday also displays attendance alerts on the Edit and Approve Time report.

Steps

1. Access the Create Time Attendance Status task.
2. Create 1 or more attendance statuses.
   Example: You want Workday to alert you when a worker checks in or checks out more than 10 minutes before or after their scheduled time. You create these attendance statuses:
   - Early Check-In (>10 min.)
   - Late Check-In (>10 min.)
   - Early Check-Out (>10 min.)
   - Late Check-Out (>10 min.)
3. Access the Create Time Attendance Point Configuration task.

   Enter a point value for each time attendance status. You can also enter a date in the Expires After (Days) field so that after a particular number of days, Workday removes the attendance points from the worker. Enter a value between 1 and 366.
4. Access the Create Time Attendance Justification Reason task.
5. Create reasons that managers can select to justify an attendance event. Example: Medical Appointment.
6. Access the Create Time Attendance Rule Set task.
7. As you complete the task, consider:

Option	Description
Effective Date	Enter an effective date. When testing, ensure that the attendance rule set is active on or after the date that you're testing.
Order	Workday runs the rules in order of priority. Workday only applies 1 attendance status per check-in or check-out event.
Attendance Status	Select an attendance status that you've created, or create a new one.
Time Punch Type	Workday automatically populates this field based on your selection in the Shift Event column.
Minutes	Enter the number of minutes before or after a shift event when Workday should apply this status to the time block.
Relational Operator	Select either Less Than or Greater Than.
Shift Event	The shift event from the worker's work schedule calendar or Workday Scheduling. When you don't want to track attendance for meals and breaks, select: • *First In of the Schedule Shift* to evaluate the first scheduled shift block of the day. Example: The morning work block before a meal. • *Last Out of the Schedule Shift* to evaluate the last scheduled shift block of the day.

Option	Description
	Example: The afternoon work block after a meal.

Example: To create a rule that applies the status Late from Meal Break to workers who are more than 10 minutes late returning their 30-minute meals, enter these values:

Attendance Status	*Late from Meal Break*
Minutes	*40*
Relational Operator	*greater than*
Shift Event	*After Meal Start*

8. (Optional) Set Up No Shows on page 2900.
9. Access the Create Time Attendance Rule Eligibility task.
10. Select a Rule Set and eligibility rules to apply the rule set to groups of workers.

    You can select groups of workers based on Time Tracking eligibility rules and increase performance by adding a country or job profile.

    Workday recommends that workers only be eligible for 1 time attendance rule set at a time. When workers are eligible for multiple time attendance rule sets at once, Workday only applies 1 rule set. Workday applies the oldest rule set first.
11. To give managers the ability to modify time attendance data, configure these security domains in the Time Tracking functional area:
    - *Maintain: Adjust Attendance Points for Workers*
    - *Worker Data: Justify Time Attendance Status*
    - *Worker Data: Mass Justify Time Attendance Status*

Example

This example illustrates how Workday evaluates time attendance when shifts contain meal breaks.

A worker is scheduled to work the 8:00 AM - 4:30 PM shift with a 12:00 PM - 12:30 PM meal break. To check time attendance, Workday splits the shift into these shifts:

Shift	Hours
Shift 1	8:00 AM - 12:00 PM
Shift 2	12:30 PM - 4:30 PM

The worker works these hours:

In	Out
8:00 AM	12:45 PM
1:15 PM	4:30 PM

Late Attendance Status Rule	Result
10 minutes > *Scheduled Shift Start*	Late. Workday compares the 1:15 PM check-in with the start time of shift 2.
10 minutes > *First In of the Schedule Shift*	No attendance status.

Late Attendance Status Rule	Result
	Workday only compares the 8:00 AM check-in with the start time of the full shift.

Next Steps

You can access these reports to view time attendance data:

- Time Attendance Entry Records for Workers
- Time Attendance Points for Workers

Related Information
Concepts
The Next Level: Attendance Management and Points
2023R2 What's New Post: Attendance Management
Tasks
Edit Domain Security Policies

Set Up No Shows

Prerequisites

Security:

- *Reports: Time Tracking*
- *Set Up: Time Attendance*

Context

You can configure Workday so that when workers don't check in for their shift, Workday creates a No Show block on the calendar. When you click into the block, Workday displays:

- The details of the scheduled shift.
- The attendance points the worker received due to the No Show.
- When the attendance points expire.

These blocks are different from time blocks and won't be included when you report on time blocks. They will also appear regardless of whether you've run time calculations.

You can also configure attendance points for the No Show status and Workday will apply those points to the worker. Using Workday Talent, you can set up disciplinary actions that trigger according to the number of attendance points that a worker has.

You can use this feature with either Workday Scheduling or work schedule calendars.

Steps

1. Access the Create Time Attendance Status task.
2. Create a time attendance status to apply to workers when they unexpectedly don't check in for their shift. Example: *No Show*
3. Access either the Create Time Attendance Rule Set or Edit Time Attendance Rule Set task. As you complete the task, consider:

Option	Description
Option	Description
No Show Attendance Status	Select a status or create a new one.

Option	Description
Grace Period (Minutes)	Enter the number of minutes beyond the start time of the shift after which a worker is considered a no show. Example: You enter 15. Roy is scheduled for a 9:00AM shift. If he checks in at 9:20AM, he will be considered a No Show for his shift.

4. (Optional) Access the Create Time Attendance Point Configuration task to assign attendance points to the No Show status.

   You can also enter a date in the Expires After (Days) field so that after a particular number of days, Workday removes the attendance points from the worker. Enter a value between 1 and 366.

Result

If there's any increment of time off or a holiday on the same day, no No Shows will fire for that day.

However, when a worker takes an absence on the same day as their scheduled shift, you will need to rerun calculations in order for No Shows not to fire. Example: Ben is scheduled to work a shift starting at 9AM today, but requests sick time off at 8AM. You must rerun calculations in order for the No Show not to fire.

If you've added an absence on the day a No Show fired, you can rerun calculations to clear it.

No Shows do not display in the period calendar or in theEdit and Approve Timereport.

Related Information
Concepts
2024R2 Feature Release Note: No Shows

Example: Send Time Tracking Notifications

This example illustrates how to set up scheduled distribution notifications to workers who use Time Tracking.

Context

You want to create and send SMS notifications to workers with unsubmitted time entries for the past 2 months. You want to send weekly notifications starting next Monday at 11:00 AM until the end of the year and include a link to the Enter My Time task.

Prerequisites

Security:

- *Administer Scheduled Distribution* domain in the System functional area.
- *Custom/Standard Report Copy* domain in the Tenant Non-Configurable functional area.
- *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Steps

1. Access the Create Distribution Time Period task.
   a) Select these values:

Field	Value
Name	*Two Months*
Unit of Time	*Months*

Field	Value
Quantity	*2*

b) Click OK and Done.

2. Access the Copy Standard Report to Custom Report task.
    a) From the Standard Report Name prompt, select *Workers with Unsubmitted Time*.
    b) Click OK.
    c) Click OK.
    d) On the Share tab, select these values:

Field	Value
Report Definition Sharing Options	*Share with specific authorized groups and users*
Authorized Users	*Time Tracking Administrator*

    e) Click OK and Run.
    f) From the Time Period prompt, select *Two Months*.
    g) Click OK.
3. Access the Edit Tenant Setup - Notifications task.
    a) In the Notification Delivery Settings section, select Time Tracking.
    b) From the Rule prompt, select *Create Notification Routing Rule*.
    c) In the Name field, enter *Unsubmitted Time Notification*.
    d) Click Add.
    e) Select these values:

Field	Value
Channel	*Mobile Push Notification*
Default Frequency	*Immediately*

    f) Click OK.
    g) Click OK.
4. Access the Create Scheduled Distribution task.
    a) Select these values:

Field	Value
Title	*Workers with unsubmitted time for the past 2 months*
Content Type	*Enter Time*
Content	*Two Months*

    b) Click Next.
    c) Select Create New.
    d) Select these values:

Field	Value
Name	*Workers with unsubmitted time for the past 2 months*
Type	*Custom Report*

Field	Value
Selection	*Workers with Unsubmitted Time - Copy*

e) Expand the Report Criteria section.
f) In the Time Period row, select *Two Months* from the Value prompt.
g) Click Next.
h) Click Next.
i) In the Message field, enter a message to the workers. Example: Please submit your time.
j) Click Next.
k) From the Run Frequency prompt, select *Weekly Recurrence*.
l) Click Next.
m) Select these values:

Field	Value
Request Name	*Weekly notification to workers with unsubmitted time*
Day(s) of the Week	*Monday*
Start Time	*11:00 AM*
Start Date	Select the date of the next Monday.
End Date	Select the last day of the year.

n) Click OK and Done.

Related Information
Tasks
Steps: Schedule Worker Communication Notifications

Concept: Edit and Approve Time

Managers can use the Edit and Approve Time report to get a single-page overview of time entries for:

- Selected workers.
- Organizations.
- Their direct reports.

They can apply filters to refine the display by:

- Employee type.
- Job exempt status.
- Pay rate type.
- Worker type.

With the Edit and Approve Time report, managers can also:

- Correct existing worker time entries.
- Drill down on alerts for each worker to view details, correct errors, and resolve warnings causing these alerts.
- Enter time off for a worker or approve the time offs submitted through Time Tracking or Absence Management.
- Manually add new time entries or autofill from the work schedule calendar.
- Mass submit and approve time entries for multiple workers.
- Send back or deny individual worker time entries.
- View workers' scheduled hours alongside their reported time.

When you configure your tenant to submit by time period and review time by period, managers can approve, submit, send back, or deny time entries by period for workers based on their period schedules.

The report automatically sorts workers into grids of workers with or without alerts. The Workers with Alerts section displays workers with time entries that managers need to review and edit due to critical errors, warnings, or custom validations.

The Edit and Approve Time report doesn't:

- Display time blocks if they are outside the period selected.
- Enable you to delegate time submission or approval to another user.
- Filter out workers who don’t have time entry eligibility.
- Support the ability to manually advance time entries through business processes. Time entries can't be approved until the business process routes them to the approver.

You can't configure the:

- Time Approval Summary.
- Weekly Summary.
- Totals. Workday always displays reported quantities for daily totals and worker row totals.

We recommend you use the Edit and Approve Time report for groups of 50 workers or less.

When you configure the Edit and Approve Time report on desktop, the Edit and Approve Time worklet automatically displays on the Workday mobile app for all eligible managers. The mobile app enables managers and administrators to review, edit, and approve employee time directly from their iPhone and Android devices.

On mobile, managers and administrators can:

- Approve or submit multiple time entries at once for Workers without alerts.
- Filter time entries that have errors or warnings for Workers with Alerts .
- Easily contact employees if the employee's contact information is set to Primari and Public in Workday.

Note: This functionality is not currently available on iPads.

Access the Report

On desktop, you can access the Edit and Approve Time report:

- As a shortcut on your Home page.
- From the Team Time worklet.
- From the Time and Absence dashboard.
- From the Time and Scheduling Hub.
- Using global search.

Choose How to Review and Approve Time

You can configure both the Review Time and Edit and Approve Time reports so that managers can review and approve time for multiple workers at once. The Edit and Approve Time report also enables managers to make corrections before approval without switching between mass action and individual worker views. You can make both of these reports available for all your managers, or you can enable Review Time for some managers and Edit and Approve Time for others.

Related Information

Concepts

2025R2 Feature Release Note: Display Scheduling Data on the Edit and Approve Time Report

2024R1 What's New Post: Edit and Approve Time

Workday Community: Edit and Approve Time (EAT) FAQ

Tasks

Add Dashboard Menus

Set Up Hubs

Set Up Worklets

Concept: Time Block Approval Moments

Approval moments describe the date and time that a time block was approved. Example: 2015-09-12 08:14:38.

You can run a custom report built on the Calculated Time Blocks Approved Between a Date Range report data source. When you run the custom report, Workday returns all of the calculated time blocks approved within the approval moments that you specify. Approval moments include the time, as well as the date of the time block approval. You can refine the approval moment down to the minute.

The report data source returns the latest version of a time block within the date range that you specify. As a result, if you run the custom report frequently, you can observe time block changes over time. Example: You can keep track of fluctuations in project costs during a month by running the report weekly.

Example: Time Block Changes with Different Approval Moments

Amanda submits a time block for a project she worked on to her manager for approval. After the first approval, Amanda changes the number of hours. After the second approval, Amanda changes the project. In total, her manager approves the time block on 3 separate occasions.

Approval Moment	Hours	Project
2015-09-07 08:35:18	8	A
2015-09-09 13:05:23	4	A
2015-09-09 15:55:39	4	B

The report returns different results based on the start and end moments that you specify.

Approval Start and End Moments that Include Multiple Versions

If you enter start and end moments that capture multiple versions of a time block, the report returns the latest version of the time block within that range.

When you enter these approval moments:

- Approval Start Moment: *2015-09-07 6:00:00*
- Approval End Moment: *2015-09-09 18:00:00*

The report returns the third version:

Approval Moment	Hours	Project
2015-09-09 15:55:39	4	B

When you enter these approval moments:

- Approval Start Moment: *2015-09-07 6:00:00*
- Approval End Moment: *2015-09-09 14:00:00*

The report returns the second version:

Approval Moment	Hours	Project
2015-09-09 13:05:23	4	A

Approval Start and End Moments that Include a Single Version

If the start and end moments isolate a specific version of the time block, the report also returns any changes that offset a previous version of the time block.

When you enter these approval moments:

- Approval Start Moment: *2015-09-07 11:00:00*
- Approval End Moment: *2015-09-09 14:00:00*

The report returns the second version of the time block, with an offset for the first version:

Approval Moment	Hours	Project
(offset from first change)	-8	A
2015-09-09 13:05:23	4	A

When you enter these approval moments:

- Approval Start Moment: *2015-09-07 06:00:00*
- Approval End Moment: *2015-09-09 10:00:00*

The report returns the first version without an offset, because it doesn't have any previous changes:

Approval Moment	Hours	Project
2015-09-07 08:35:18	8	A

Concept: Time Anomalies

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.

What Are Time Anomalies?

Time anomalies are time blocks that, for one or more reasons, are atypical for a worker. Workday uses machine learning to determine workers' normal time entry patterns from historical data based on:

- Time entries.
- Time off.
- Work schedules.
- Whether time approvers approved, denied, corrected, or sent back similar time blocks.

Workday identifies time blocks that violate these patterns and assigns the time block a score. This score quantifies the likelihood that the time block is anomalous. When Workday identifies a time block as anomalous, it doesn't mean that the time block is invalid. Rather, the time block is atypical and might require additional attention.

Once Workday identifies anomalous time blocks, you can:

- Create custom reports to view time anomaly scores and top time anomaly reasons for time blocks.
- Access the Time Anomaly Trends report to view time anomaly trends by supervisory organization.
- Enable managers and timekeepers to see and take action on time anomalies within the Review Time report.

Time anomaly detection is meant to supplement time entry validations. Time entry validations and rule conditions are the best way to catch known errors. Alternately, time anomaly detection helps you identify unusual time entries that don't violate validations.

Time Anomalies and Machine Learning

The machine learning model observes the actions (approving, denying, correcting, sending back) taken by managers, administrators, and workers. Using this data, the model learns what kinds of time entries are acceptable or unacceptable. Example: A manager regularly approves a worker’s time blocks from 8:00 AM-5:00 PM on Monday through Friday. Over time, Workday learns that 8:00 AM-5:00 PM blocks are acceptable. Alternatively, a worker repeatedly enters time blocks from 7:00 AM-11:00 PM, and the manager repeatedly sends back the time blocks. Workday learns that this behavior isn't acceptable and assigns a higher anomaly score to future similar time blocks.

As Workday observes more and more actions, the machine learning model more accurately identifies anomalies. However, this means that Workday isn’t able to detect anomalies if a manager or administrator has never taken action on them before. Example: A worker incorrectly submits time on a Saturday from 1:00 AM-5:00 AM. Since enabling time anomaly detection in the tenant, workers haven’t entered any similar time blocks, and administrators haven’t taken action on similar time blocks. Workday doesn’t flag this time block as anomalous. Once the manager takes action on the block, Workday will begin to learn that this block and similar blocks are unacceptable. Workday then assigns a higher anomaly score to similar time blocks.

Time Anomaly Implementation

The model trains on historical time data for each worker. To have sufficient data for the model to analyze, Workday recommends you deploy Time Tracking at least 1 year before implementing time anomaly detection. We recommend you opt in to the workforce management machine learning service and data categories in a Production tenant so that the model can train with live data for at least 3 weeks. You can monitor the results in the Time Anomaly Trends report. Wait until anomaly results are consistent before you make them visible in the Review Time report. To hide time anomalies from managers and time approvers during this period, don’t select the Include Time Anomalies check box on the Edit Time Approval Template task.

Testing this feature in a nonproduction tenant has limitations because the model needs a constant stream of live data to learn the patterns of acceptable and unacceptable time blocks. When you opt in to time anomaly detection in your Production tenant, the machine learning model can access more data and quickly improve accuracy. If you need to test time anomaly detection in a nonproduction tenant, you can enable the feature in Implementation tenants. To generate time anomalies in a nonproduction tenant, you need to submit and either approve or deny time blocks in that tenant.

Possible Anomaly Reasons

While there might be multiple factors that contribute to a time block being anomalous, Workday identifies only 1 top possible anomaly reason for each time block. You can view anomalies that a manager can take action on in the Review Time report. Possible anomaly reasons include:

Reason	Description	In Review Time
Calculated Quantity	The quantity of time that the worker entered is greater than or less than their scheduled quantity of time.	Yes
Check-in	The check-in occurs outside of the worker's usual check-in time (based on their work schedule calendar).	Yes
Check-out	The check-out occurs outside of the worker's usual check-out time (based on their work schedule calendar).	Yes
Day of Month	The worker entered time for a day of the month when they typically don't work.	
Day of Week	The worker entered time for a day of the week when they typically don't work.	Yes
Employee Type Location Location Type Job Profile Supervisory Organization Worker Type	The worker belongs to an employee type, worker type, job profile, or supervisory organization that frequently has anomalous time entries. Example: Members of the Sales organization have higher levels of time anomalies because they enter time on mobile devices while traveling. Workday takes this factor into account when determining the top possible anomaly reason.	
Modified by Others	Someone other than the worker modified the time block.	
Position Worker Time Block	A multiposition worker entered 1 or more positions that are different from the positions they typically work.	
Project Worker Time Block	A Projects worker entered 1 or more projects that are different from the projects they usually work on.	
Reported Quantity	The quantity of time that the worker entered is greater than or less than the worker's typical time entry pattern.	Yes
Reported & Scheduled Quantity Difference	The quantity of time that the worker entered is greater than	Yes

Reason	Description	In Review Time
	or less than their scheduled quantity of time.	
Shift Date	The shift date on the time block might be unusual.	
Time Anomaly Count	The worker has a history of multiple anomalous time entries.	
Time Calculation Tags	The worker entered time for 1 or more time calculation tags that they typically don't use.	
Time Clock Event History	The time clock event history for the time block might include a missed check-in, check-out, or both.	
Time in Position	Workers who have been in a position for a certain amount of time can enter more anomalies than others. Example: A worker just started in a new position and entered an anomalous time block. Their top possible anomaly reason could be Time in Position.	
Time Type	The time type entered is different from the worker's usual time type.	Yes
Worktags	The worktags the worker entered are different from the worktags they typically enter.	Yes

Time Anomaly Confidence Score

Workday uses an anomaly confidence score to quantify the likelihood that a time entry is anomalous. The anomaly confidence level is:

- Low when it corresponds to 50 to 80 percent.
- Medium when it corresponds to 80 to 90 percent.
- High when it corresponds to 90 to 100 percent.

You can include the anomaly score in custom reports using the Time Anomaly Score report field on the Time Block business object.

Time Anomalies in Review Time

You can enable time anomalies to display in the Review Time report. When you display anomalies in Review Time, managers and timekeepers can quickly identify time entry issues that need their attention. Workday displays a Workers with Possible Time Anomalies filter on the summary page of the Review Time report. Workday also displays these columns:

- Possible Time Anomaly Count on the summary page.
- Possible Time Anomaly Reason in the worker details view.
- Time Anomaly Confidence Level in the worker details view.

The Review Time report only displays time anomalies that a manager can take action on. Examples:

- Managers can only approve submitted time. Workday won't display time anomalies related to approved or unsubmitted time.
- Time needs to be ready to approve without any errors. Managers can't approve time with errors.
- Workday won't display time anomalies related to job profiles because managers can't modify job profiles from the Review Time report.

Related Information

Concepts

Steps: Set Up Machine Learning for Time Anomalies on page 2887

Set Up the Review Time Report on page 2882

The Next Level: Time Anomalies

Workday 2021R1 What's New Post: Time Anomalies as an Innovation Service

Tasks

Test Time Anomalies in Implementation Tenants on page 2888

Concept: Dashboards for Time Tracking and Absence

Workday provides 2 dashboards from which you can access Workday Time Tracking and Absence Management reports, manager self-service (MSS) tasks, and analytics:

Dashboard	Description	Domain	Available on Mobile
Team Absence	Configure if you use Absence Management without Time Tracking.	*Management Dashboard: Absence* in the Time Off and Leave functional area	No.
Time and Absence	Configure if you use both Time Tracking and Absence Management.	*Management Dashboard: Time Tracking* in the Time Tracking functional area	No.

You can use the Maintain Dashboards task to configure the dashboards and select these reports to display on the dashboards as worklets:

Report	Description	Dashboard	Functional Area	Security Domain
Compare Reported and Scheduled Hours	Displays the variance between a worker's reported and scheduled hours over the last 2 months.	Time and Absence	Time Tracking	*Worker Data: Reports*
My Team's Upcoming Time Off	Displays leave information of workers in your supervisory organization for the current week. You can change the date range.	Team Absence	Time Off and Leave	*Worker Data: Time Off (Time Off)*
Weekly Average Calculated Hours	Displays average calculated hours.	Time and Absence	Time Tracking	*Reports: Time Tracking*

Report	Description	Dashboard	Functional Area	Security Domain
	You can configure the report using calculation tags so that you see a particular time type. Example: To report on average weekly overtime, select the Overtime tag in the Calculation Tags prompt.			
Workers Currently on Leave	Available only from the dashboard.	Both	Time Off and Leave	*Worker Data: Leave of Absence*
Workers Returning from Leave this Week	Available only from the dashboard.	Both	Time Off and Leave	*Worker Data: Leave of Absence*

You can display these Time Tracking reports on both dashboards as menu items:

Report	Description	Security Domain
My Team's Calculated Hours by Cost Center Worktag	Displays calculated hours by cost center for a manager's direct reports.	*Worker Data: Reports*
My Team's Scheduled Hours	Displays the scheduled hours for each worker in a manager's supervisory organization.	*Worker Data: Reports*
Time Block Audit	Provides audit history details for time blocks and time clock events over a specific period. The Time Block Changes report field enables users to view details of each modification per time block at a glance.	*Worker Data: Reports*
Weekly Average Calculated Hours	Displays average calculated hours. You can configure the report using calculation tags so that you see a particular time type. Example: To report on average weekly overtime, select the Overtime tag in the Calculation Tags prompt.	*Reports: Time Tracking*
Weekly Average Hours Worked	Displays the weekly average hours so you can compare average hours across weeks and identify patterns or changes in labor trends over time.	*Reports: Time Tracking*

Related Information

Concepts

Steps: Set Up Time Off Plans on page 2276

Steps: Set Up Dashboards and Landing Pages

Steps: Set Up Leave of Absence on page 2563

The Next Level: Time Tracking Reports, Dashboards, and Integrations

The Next Level: A Day in the Life of a Time Tracking Administrator

The Next Level: Day in the Life: Absence Administrator

Reference: Time Tracking Background Jobs and Processes

You can monitor the background jobs and processes that Workday Time Tracking is running in your tenant.

Background Job or Process	Description	Where to View
Mass Auto-fill from Schedule	Populates time blocks for multiple workers at once based on their work schedules. Runs according to the Run Frequency setting that you select.	Background Job Monitor Process Monitor
Process Time Clock Events	Runs when you use these web services: • *Put Time Clock Events* • *Import Time Clock Events*	Background Job Monitor Process Monitor
Process Time Block from Reported Time Batch Event Process Time Off from Reported Time Batch Event	Run when you use the Mass Enter Time report to enter time for multiple workers at once. Also run when you use these web services: • *Put Reported Time Blocks* • *Import Reported Time Blocks*	Background Job Monitor Process Monitor
Rescind Reported Time Batch Event	Runs when you rescind the Reported Time Batch Event business process.	Background Job Monitor Process Monitor
Run Time Calculations for a Date Range	Runs when you manually run time calculations using the Run Time Calculations for a Date Range report.	Background Job Monitor
TCE Sweeper	Runs every 15 minutes to collect and process queued Process Time Clock Events jobs.	Background Job Monitor Process Monitor

Troubleshooting: Managers Can't View Project Time Blocks on Reports

Cause	Solution
The project manager doesn't have a role on the project.	Assign Roles to Projects. Assign the project manager a role on the project or project hierarchy.

Cause	Solution
	Security: *Manage: Project Details* domain in the Project Tracking functional area.
Workers report time outside of the project manager's supervisory organization.	Remove any indexed report fields from these fields in your custom report: • Custom Report Filter • Group By Field See Set Up Filter Options for Custom Reports. Indexed report fields prevent managers from viewing project time blocks outside of their supervisory organization.
The project manager doesn't have security domain access.	1. Give the project manager access to these security domains using an unconstrained, role-based security group: • *Reports: Time Tracking* domain in the Time Tracking functional area. • *Manage Project Plan* domain in the Project Tracking functional area. See Steps: Set Up Security Permissions. When you use this security setup, project managers can report on all time blocks for the workers on their projects, including time worked for different projects or supervisory organizations. 2. (Optional) Create Custom Reports. Use the *All Time Blocks* report data source with one of these project data source filters: • *Reported Time Blocks for Projects/ Project Hierarchies* • *Reported Time Blocks for Projects/ Project Hierarchies and Company* When you use project data source filters, you limit reports to display only time blocks of projects belonging to the project manager.

Troubleshooting: Review Time Report

Time approvers can't view time entries in the Review Time report.

Cause	Solution
The approver doesn't have security access to review and approve time.	Add the time approver to a security group authorized to approve or manually advance the *Enter Time* business process.
The time entry isn’t in a *Submitted* status.	Submit the time entry or edit the time entry so that it is in a *Submitted* status.

Cause	Solution
The worker has a different Start Day of Week from the Start Day of Week you selected when configuring the report.	Modify either the worker's work schedule calendar or the time approval template so that both have the same Start Day of Week.
You didn't enable Review Time by Period.	Select the Review Time by Period check box on the Edit Time Approval Template task. Ensure that the time entry you want to review is within the period you selected.

Workday displays workers without alerts on the Workers with Alerts tab.

Cause: Worker had an alert at the point of time submission, but the alert no longer applies.

Solution: Workday identifies workers with alerts at the point of time submission. It's possible that the alert might no longer apply if the condition of the alert isn't met. The condition might no longer be met due to a data change outside of time entry or because you change the validation. Workday will continue to include the worker on this tab even though they no longer have any alerts.
Related Information
Concepts
Set Up the Review Time Report on page 2882

Safety Incident Tracking

Steps: Set Up Safety Incident Tracking

Prerequisites

Configure the *Report Safety Incident* and *Edit Safety Incident* business processes and security policies in the Safety Incident Tracking functional area.

Context

The Workday framework for safety incident tracking helps you identify and track safety-related trends and problems. You can:

- Restrict safety incident tracking to the United States only.
- Report safety incidents for workers based outside the U.S. by creating a Safety Partner in a non-U.S. position.
- Track industry or location-specific safety incident data by creating and attaching a questionnaire to a safety incident business process.
- Maintain the questionnaire.

Note: You're responsible for reporting safety incident information as required by regulations applicable to your business. Workday provides fields for typical use in the U.S., but doesn't assume any responsibility for compliance.

Steps

1. Create Location Hierarchies.
2. Access the Edit Tenant Setup - HCM task.

   Configure the ID Definition for Safety Incident ID prompt.

   Security: *Set Up: Tenant Setup - HCM* domain in the System functional area.

3. (Optional) Configure Questionnaires and Questions.
4. Access these tasks for safety incident tracking:
   - Maintain Body Part Categories
   - Maintain Body Parts
   - Maintain Government Reporting Agencies
   - Maintain Health Facilities
   - Maintain Health Treatment Types
   - Maintain Health Workers
   - Maintain Health Worker Types
   - Maintain Incident Types
   - Maintain Natures of Injury/Illness
   - Maintain Safety Incident Locations
   - Maintain Sources of Injury/Illness

   You can access these tasks in any order and skip the ones you don't need. Because Workday uses the values in the tables for custom reporting and tabulation, ensure they match the reporting needs of your company.

   Security: *Set Up: Safety Incident Tracking* domain in the Safety Incident Tracking functional area.

Next Steps

Set up leave of absence. Workday doesn't automatically coordinate safety incident tracking with leave of absence.

Related Information
Tasks
Steps: Set Up Leave of Absence on page 2563

Concept: Safety Incident Reports

Workers can log safety incidents using the Report Safety Incident task. Required details include the incident date and time, location, and the name of the person reporting the incident.

- Incident Type enables you to group incidents according to your needs.
- Incident Location areas are maintained in setup tables and are separate from business site locations. Example: A single location could have several buildings, each of which is a unique safety incident location.

You can use the Configure Optional Fields task to hide or require fields on these tasks and reports:

- Report Safety Incident task.
- Update Safety Incident task.
- View Safety Incident report.

You can provide information about each involved party in an incident, such as the nature of injury or illness, investigation details, and time lost. You can also add notes and attachments. The worker data in the report is current on the incident date.

Each incident report has a status: *Draft*, *New*, *Pending Investigation*, and *Completed Investigation*. You can submit the incident event to a business process and approval workflow.

For information about safety reports, access Workday Standard Reports and select *Safety Incident Tracking* as the report category.

Concept: Safety Incident Security

Safety incidents have 2 components with separate contextual security:

- A safety incident report associated with a business site location.
- One or more involved parties that belong to supervisory organizations.

This contextual security applies to all safety incident tasks, reports, business processes, and report data sources. This means:

- Safety incidents with an involved party are accessible to roles on either the location hierarchy or supervisory organization.
- Safety incidents without an involved party are accessible only to roles on the location hierarchy, since there's no supervisory organization.

The table displays examples of access to safety incidents for different roles:

Example	Security Group	Access
Safety Administrator (or similar role)	User-based	• Can view all safety incidents and involved parties, including nonworker involved parties. • Can report, update, and rescind safety incidents, when assigned to all safety domains and business processes.
Safety Partner (or similar role)	Role-based (location hierarchy)	• Can view all safety incidents in their business site location, as well as safety incidents they entered. • Can view all involved parties, including nonworker involved parties. • Can report, update, and rescind safety incidents, when assigned to safety domains and business processes.
Manager	Role-based (supervisory organization)	• Can view all safety incidents they entered and any safety incident involving at least 1 party in their organization. • Can only view involved parties in their organization and nonworker involved parties. • Can report and update safety incidents, when

Example	Security Group	Access
		assigned to safety domains and business processes.
Worker	Employee as Self	• Can only view safety incidents to which they're an involved party. • Can't see other involved parties.
Reporter	Any security group	Can see all safety incidents that they reported, as long as they are in a security group assigned to safety domains.

When you use the Report Safety Incident task to add an involved party to a safety incident report, you only see the Nature of Injury/Illness collapsible section. This is because the supervisory organization context isn't available. You see the additional tabs in the Update Safety Incident task when the involved party provides context for security access.

Alternatively, you can assign the *Employee as Self* and *Contingent Worker as Self* security groups to the *Self-Service: Safety Incidents* domain to display the additional tabs in the Report Safety Incident task. However, these collapsible sections are visible to workers if they have permission to view safety incidents.

Related Information
Concepts
Concept: Security Groups

Employee and Manager Self-Service

Steps: Set Up Employee Self-Service

Prerequisites

Understand which Workday-provided security groups enable employees and contingent workers to access the Workday security domains that you select for employee self-service (ESS).

Context

ESS tasks are available:

- On the Home landing page through worklet links.
- From a worker's related actions menu.

Workers can access their primary landing page by clicking the Workday logo at the top of any page in Workday. The worklets that employees see vary based on the functional areas you implement and which worklets you configure as required or optional.

You can grant access to ESS tasks through domain security policies in various functional areas:

Functional Area	Domain Security Policies
Benefits	• *Self-Service: Beneficiaries* • *Self-Service: Benefits*

Functional Area	Domain Security Policies
	• *Self-Service: Dependents*
Career and Development Planning	• *Self-Service: Connections* • *Self-Service: Mentoring*
Core Compensation	• *Self-Service: Compensation* • *Self-Service: Insurance Calculated Coverage* • *Self-Service: Total Rewards Dashboard*
Contact Information	• *Self-Service: Emergency Contacts* • *Self-Service: Home Contact Information* • *Self-Service: Name* • *Self-Service: Work Contact Information*
CAN Payroll	*Self-Service: Payroll - CAN*
Core Payroll	• *Self-Service: My Pay Dashboard* • *Self-Service: Payroll*
Expenses	• *Self-Service: Expense Report* • *Self-Service: Payment Election* • *Self-Service: Spend Authorizations* • *Self-Service: Travel Booking*
Performance Enablement	• *Self-Service: Check-Ins* • *Self-Service: Delete Development Item* • *Self-Service: Development Items* • *Self-Service: Employee Reviews* • *Self-Service: Feedback*
Personal Data	• *Self-Service: Person* • *Self-Service: Personal Data* • *Self-Service: Verify National ID*
Procurement	• *Self-Service: Procurement Card Transaction Verification* • *Self-Service: Purchase Order* • *Self-Service: Receipt* • *Self-Service: Requisitions and Templates* • *Self-Service: Supplier Contact Tasks* • *Self-Service: Time and Tasks*
Talent Pipeline	*Self-Service: Talent Card*
Time Off and Leave	• *Self-Service: Leave of Absence* • *Self-Service: Leave of Absence Entitlements* • *Self-Service: Team Absence Calendar* • *Self-Service: Time Off* • *Self-Service: Time Off Balances* • *Self-Service: Worklets: Absence*
Time Tracking	• *Self-Service: Time Tracking* • *Self-Service: Time Tracking High Volume*
USA Payroll	• *Self-Service: Payroll (My US Territory Year End Forms)*

Functional Area	Domain Security Policies
	• *Self-Service: Payroll - USA*
Worker Profile and Skills	• *Self-Service: Personal Notes* • *Self-Service: Skills and Experience* • *Self-Service: Upload My Experience*

Steps

1. Access the Maintain Functional Area task.

   Select the Enabled check box for the functional areas you plan to deploy.

   Security: *Security Configuration* domain in the System functional area.
2. Review the tasks and reports associated with the self-service domains:
   a) Search for *domain: self-service* and select the domain you want to review.
   b) In the Reports and Tasks section, view the reports and tasks secured to the domain and determine which you want visible to your employee population.
3. Disable access to specific tasks within the delivered domain security policies.

   See Edit Domain Security Policies.
4. Configure the Home landing page.

   See Steps: Set Up Dashboards and Landing Pages.

   Note: Workers can customize the Home landing page to suit their preferences.

Next Steps

Workday Knowledge Management offers an Adoption Kit with various resources and customizable training materials for self-service users. Learn more about this toolkit at Workday Community: Adoption Kit.

Note: The Workday documentation provides information for administrators to understand, set up, and manage Workday functionality and isn't designed to support self-service users.

Related Information

Concepts

Concept: Configurable Security

Reference

Reference: Security-Related Reports

Reference: Set Up Help for Self-Service Users

Steps: Set Up Manager Self-Service

Context

Managers can access self-service tasks and reports on the Home landing page, available by clicking the Workday logo at the top of any page in Workday. Customize this page by specifying which worklets are required or optional for different groups of managers. Managers can also customize their own Home landing pages to suit their preferences.

In addition, you can simplify manager self-service (MSS) tasks by limiting the number of reasons that managers can select for specific types of events. If you provide only 1 reason for an event, Workday automatically populates the reason on that task.

You can also hide links and related actions for job profiles, locations, management levels, and positions. Hiding these items prevents managers from misinterpreting them as editable on profiles, tasks, and reports.

Steps

1. Configure the Home landing page:
    a) Select the tasks and reports to include in each required or optional worklet.
    b) Add the *Manager* security group to the security policy for each manager self-service task and report.

    See Steps: Set Up Dashboards and Landing Pages.
2. Limit the reasons that are available for selection in MSS tasks:
    a) Access the Maintain Event Categories and Reasons task.

       Security: *Set Up: Staffing* domain in the Staffing functional area.
    b) Select an Event type.
    c) Select the Manager Reason check box for each reason that you want to include in selection lists for managers who perform this task.
    d) Repeat steps a-c for other Event types that managers perform.
3. Select Manager Reasons in these tasks if they're available in manager self-service:
    - Maintain End Additional Job Categories
    - Maintain Local Termination Reasons
    - Maintain Termination Categories

    Security: *Set Up: Staffing* domain in the Staffing functional area.
4. Hide links and related actions by removing the Manager role from these domains:
    - *Job Profile: View*
    - *Location: View*
    - *Management Level: View*
    - *Worker Position: View*

    See Edit Domain Security Policies.

Next Steps

Workday Knowledge Management offers an Adoption Kit with various resources and customizable training materials for self-service users.

Related Information
Concepts
Concept: Configurable Security
Reference
Reference: Security-Related Reports
Reference: Set Up Help for Self-Service Users
Workday Community: Adoption Kit

HCM Hubs

Reference: HCM Admin Hub

HCM Admin Hub

The HCM Admin Hub displays setup and configuration tasks and reports for:

- Core HCM

- Recruiting
- Compensation
- Benefits
- Absence
- Time Tracking
- Scheduling

Overview Page

From the Overview page, you can access links to:

- TheJob Architecture Hub (secured to the *Manage: Job Architecture Hub*) domain. The Job Architecture Hub provides you a centralized space to better manage, report on, and gain insights from your job architecture data.
- The HCM Admin Guide.

The Overview page also displays the latest HCM feature release notes from the What's New in Workday report.

Core HCM Section

You can access these cards on the Job Architecture page:

Item	Security	Description
Job Family Group card	*Set Up: Job*	Enables you to view, edit, and create job family groups.
Job Family card	*Set Up: Job*	Enables you to view, edit, and create job families.
Job Profiles card	*Set Up: Job* *Job Profile: View*	Enables you to view, edit, and edit job profiles.
Workers' Compensation Codes card	*Set Up: Job* *Set Up: Jobs & Positions*	Enables you to edit, add, and view all workers' compensation codes.
Company Insider Type card	*Set Up: Job*	Enables you to edit, add, and view all company insider types.
Job Categories card	*Set Up: Job*	Enables you to edit, add, and view all job categories.
Job Classification Group card	*Set Up: Job*	Enables you to view, edit, and create job classification groups.

You can access these cards on the Contracts & Agreements page:

Item	Security	Description
Employee Contract Types card	*Set Up: Employee Contracts*	Enables you to edit, add, and view all employee contract types.
Employee Contract Statuses card	*Set Up: Employee Contracts*	Enables you to edit, add, and view all employee contract statuses.

Item	Security	Description
Employee Contract Reasons card	*Set Up: Employee Contracts* *Set Up: Employee Contract Rules*	Enables you to: • Edit, add, and view all employee contract reasons. • Edit and employee contract rules for a country.
Collective Agreements card	*Set Up: Collective Agreements*	Enables you to view, edit, and create collective agreements.
Collective Agreement Factor Option card	*Set Up: Collective Agreements*	Enables you to view, edit, and add collective agreement factor options.

You can access these cards on the Probation & Notice Periods page:

Item	Security	Description
Employee Probation Period Types card	*Set Up: Staffing*	Enables you to edit, add, and view all employee probation period types.
Probation Periods for Country card	*Set Up: Probation Period Rules*	Enables you to edit, add, and view all probation periods for a country.
Employee Probation Period Reasons card	*Set Up: Staffing*	Enables you to edit, add, and view all employee probation period reasons.
Probation Period Eligibility Rule card	*Set Up: Probation Period Rules*	Enables you to view and edit existing probation period eligibility rules.
Probation Period Outcomes card	*Set Up: Staffing*	Enables you to edit or add probation period outcomes for a country.
Notice Periods for Country card	*Set Up: Notice Period Rules*	Enables you to edit, add, and view all notice periods for a country.
Notice Period Eligibility Rule card	*Set Up: Notice Period Rules*	Enables you to view, edit, and create notice period eligibility rules.

You can access these cards on the Organizations & Establishments page:

Item	Security	Description
Organization Types card	*Set Up: Organization*	Enables you to: • Edit, add, and view all organization types. • Edit and add custom organizations.

Item	Security	Description
Organization Subtypes card	*Set Up: Organization* *Set Up: Committee Definition*	Enables you to edit, add, and view all organization subtypes.
Supervisory Organization card	*Manage: Supervisory Organization* *Create: Supervisory Organization* *View: Supervisory Organization*	Enables you to view and create supervisory organizations.
Establishment card	*Set Up: Establishment*	Enables you to: • View, edit, and create establishments. • Configure establishments by country.

You can access these cards on the Defaulting page:

Item	Security	Description
Service Date Defaults Condition card	*Set Up: Staffing*	Enables you to view, edit, and create service date defaults condition rules.
Staffing Fields Defaults card	*Set Up: Staffing*	Enables you to view, edit, and add staffing field defaults.
Working Time for Country card	*Set Up: Working Time*	Enables you to view, edit, and add working time for countries.
Worker Start Date Correction Defaulting card	*Set Up: Maintain Defaulting Rules for Worker Start Date Correction*	Enables you to edit or add defaulting rules for worker start date corrections.

Recruiting Section

You can access these cards on the Career Sites page:

Item	Security	Description
External Career Sites card	*Set Up: Career Sites* *Set Up: External Career Site Access*	Enables you to: • View, edit, and create external career sites. • View the Find Jobs template for external career sites.
External Sidebar card	*Set Up: Career Sites* *Set Up: External Career Site Access*	Enables you to view and edit existing sidebar configurations.
External Site Branding card	*Set Up: External Career Site Access* *Set Up: Site Branding*	Enables you to edit a specific brand and view all existing brands.
Internal Career Sites card	*Set Up: Career Sites*	Enables you to view and edit existing internal career sites.

Item	Security	Description
Job Application Templates card	*Set Up: Recruiting*	Enables you to: • View, edit, and create job application templates. • Edit existing job application condition rules.
Job Posting Templates card	*Set Up: Job Postings*	Enables you to view, edit, and create job posting templates.
Job Posting Template Content card	*Set Up: Job Postings*	Enables you to view, edit, copy, and create job posting template content.

You can access these cards on the General Setup page:

Item	Security	Description
Job Requisitions card	*Set Up: Recruiting* *Set Up: Job Postings*	Enables you to: • View existing job requisition defaults. • Edit existing job requisition condition rules. • Edit existing job requisition event condition rules.
Reports card	*Set Up: Recruiting* *Set Up: Job Postings* *Set Up: Questionnaire Calc Fields*	Enables you to create new report fields for questions.
Candidates card	*Set Up: Recruiting*	Enables you to: • Edit, add, and view all candidate tags. • Edit and create existing candidate list assignments.
Interviews card	*Set Up: Recruiting*	Enables you to view, edit, and add interview types.
Offers card	*Set Up: Recruiting*	Enables you to edit, add, and view all offer and employment agreement statuses.
Recruiting Dispositions card	*Set Up: Recruiting*	Enables you to edit, add, and view all existing recruiting dispositions.
Recruiting Agencies card	*Set Up: Recruiting Agency*	Enables you to: • View, edit, and create recruiting agencies. • View an Agency Performance Summary.

Item	Security	Description
Off-Site Recruiting Location card	*Set Up: Recruiting Self-Schedule Calendar*	Enables you to create new off-site recruiting locations.

You can access these cards on the Integrations page:

Item	Security	Description
Background Check Packages card	*Set Up: Recruiting* *Set Up: Background Checks*	Enables you to: • View, edit, and add background check packages. • View all existing background check packages. • Edit and add background check package condition rules.
Background Check Statuses card	*Set Up: Recruiting* *Set Up: Background Checks*	Enables you you edit and add background check statuses.
Generic Job Posting Sites card	*Set Up: Recruiting*	Enables you edit, add, and view all job posting sites.
LinkedIn Integrations card	*Candidate Data: LinkedIn Recruiter System Connect* *Set Up: LinkedIn Middleware*	Enables you to configure LinkedIn integrations.
Recruiting Assessment card	*Set Up: Recruiting*	Enables you to: • View, edit, add recruiting assessment tests. • View all existing recruiting assessment tests.
Job Requisition Assessment card	*Set Up: Recruiting*	Enables you to edit and add job requisition assessment defaults.

Compensation Section

You can access these cards on the Components page:

Item	Security	Description
Elements card	*Set Up: Compensation Elements*	Enables you to view, edit, and add compensation elements.
Eligibility card	*Set Up: Compensation Rule*	Enables you to view, edit, create, and test compensation eligibility rules.
Packages card	*Set Up: Compensation Packages*	Enables you to: • View, edit, and create compensation packaged. • Edit compensation package analytics.

Item	Security	Description
General card	*Set Up: Compensation General* *Set Up: Benchmark Jobs* *Set Up: Compensation Guidelines* *Set Up: Base and Plan*	Enables you to: • View, edit, and add frequencies. • View existing benchmark jobs. • View existing employee compensation ranges for job profiles. • Edit and add compensation bases.
Grades card	*Set Up: Compensation Packages*	Enables you to view, edit, and create compensation grades.
Grades Profiles card	*Set Up: Compensation Packages*	Enables you to: • View, edit, and add compensation grade profiles. • Edit and add compensation grade profiles for compensation grade snapshots.
Steps card	*Set Up: Compensation Steps* Add security groups to the*Set Up Compensation Step Adjustment* initiating action on the *Set Up Compensation Step Adjust* business process.	Enables you to: • Edit, add, and view all compensation steps. • Set up compensation step adjustments.

You can access these cards on the Plans page:

Item	Security	Description
Allowance card	*Set Up: Base and Plan*	Enables you to edit and create allowance plans.
One-Time Payment card	*Set Up: Base and Plan*	Enables you to edit and create one-time payment plans.
Salary card	*Set Up: Base and Plan*	Enables you to edit and create salary plans.
Hourly card	*Set Up: Base and Plan*	Enables you to edit and create hourly plans.
Calculated card	*Set Up: Base and Plan*	Enables you to edit and create calculated plans.
Commission card	*Set Up: Commissions*	Enables you to edit and create commission plans.
Bonus card	*Set Up: Merit and Bonus*	Enables you to edit and create bonus plans.

Item	Security	Description
Merit card	*Set Up: Merit and Bonus*	Enables you to edit and create merit plans.
Stock card	*Set Up: Stock*	Enables you to edit and create stock plans.
General card	*Set Up: Base and Plan*	Enables you to view the Compensation Plans report, which provides a summary of all compensation plans as of a specified date.

You can access these cards on the Statements page:

Item	Security	Description
Total Rewards Section card	*Set Up: Total Rewards*	Enables you to edit and create Total Rewards sections.
Total Rewards Rule card	*Set Up: Compensation*	Enables you to edit and create Total Rewards rules.
Total Rewards Template card	*Set Up: Total Rewards*	Enables you to edit and create Total Rewards templates.
Compensation Review Statement card	*Set Up: Merit and Bonus*	Enables you to edit and create compensation review statement rules.

You can access these cards on the Compensation Review page:

Item	Security	Description
Matrix card	*Set Up: Merit and Bonus*	Enables you to view and edit compensation matrixes.
Template card	*Set Up: Merit and Bonus*	Enables you to edit and create compensation review process templates.
Scorecards card	*Set Up: Merit and Bonus*	Enables you to view, edit, and create compensation scorecards.
Scorecard Results card	*Set Up: Merit and Bonus*	Enables you to edit and create compensation scorecard results.
Grid Configuration card	*Set Up: Merit and Bonus* *Grid Management*	Enables you to view, edit, and create grid configurations.
Participation Rule Sets card	*Set Up: Merit and Bonus*	Enables you to view, edit, and create compensation review participation rule sets.

Benefits Section

You can access these cards on the Core page:

Item	Security	Description
Provider card	*Set Up: Benefits*	Enables you to view, edit, and create benefit providers.
Group card	*Set Up: Benefits*	Enables you to view, edit, and create benefit groups.
Eligibility Rule card	*Set Up: Benefits*	Enables you to: • View, edit, and create benefit eligibility rules. • View benefit eligibility rule results.
General card	*Set Up: Benefits*	Enables you to: • View, edit, and add benefit electronic signatures. • View, edit, and add benefit coverage types. • View and edit benefit enrollment instructions. • View, edit, add, and remove benefit defaults.

You can access these cards on the Plans page:

Item	Security	Description
Benefit Plan card	*Set Up: Benefits*	Enables you to view, edit, and create benefit plans.
Health Care Rate card	*Set Up: Benefits*	Enables you to view, edit, and create health care rates.
Insurance Coverage card	*Set Up: Benefits*	Enables you to view, edit, and create insurance coverage.
Insurance Rate card	*Set Up: Benefits*	Enables you to view, edit, and create insurance rates.
Cross Plan Enrollment card	*Set Up: Benefits*	Enables you to view, edit, and create cross plan enrollment prerequisites.

You can access these cards on the Events page:

Item	Security	Description
Benefit Plan Years card	*Set Up: Benefits*	Enables you to view, edit, and create benefit plan year definitions.
Event Types card	*Set Up: Benefits*	Enables you to view, edit, and create benefit event types.
Enrollment Events card	*Set Up: Benefits*	Enables you to:

Item	Security	Description
		• View, edit, create, and delete benefit enrollment event types. • Edit and create benefit enrollment event rules.
Open Enrollment Events card	*Set Up: Benefits*	Enables you to view, edit, and create open enrollment event types.
Passive Events card	*Set Up: Benefits*	Enables you to: • View, edit, and create and passive event rules. • Schedule passive events.

Absence

You can access these cards on the Time Off page:

Item	Security	Description
Time Off Plan card	*Set Up: Time Off*	Enables you to view, edit, and create time off plans.
Absence Table card	*Set Up: Time Off (Calculations - Absence Specific)*	Enables you to view, edit, and create absence tables.
Accrual card	*Set Up: Time Off*	Enables you to view, edit, and create accruals.
Time Off card	*Set Up: Time Off*	Enables you to view, edit, and create time off.
Buy Time Off card	*Set Up: Time Off*	Enables you to view, edit, and create schedules for buying time off.
Sell Time Off card	*Set Up: Time Off*	Enables you to view, edit, and create schedules for selling time off.
Absence Threshold card	*Set Up: Absence Threshold Schedule*	Enables you to view, edit, and create absences threshold schedules.
Evaluate Tasks card	*Set Up: Time Off (Calculations - Absence Specific)* *Set Up: Time Off*	Enables you to: • Evaluate absence eligibility for a time off plan, accrual, or time off. • Evaluate absence calculations for a time off plan, accrual, or time off. • Reevaluate absence table time off entries for workers or organizations.

You can access these cards on the Leave of Absence page:

Item	Security	Description
Leave Type card	*Set Up: Leave of Absence*	Enables you to view, edit, and create leave types.
Leave of Absence Rule card	*Set Up: Leave of Absence*	Enables you to view, edit, and create leave of absence rules.

Time Tracking

You can access these cards on the Time Entry and Approvals page:

Item	Security	Description
Time Approval Template card	*Set Up: Time Tracking*	Enables you to view, edit, and create time approval templates.
Time Entry Template card	*Set Up: Time Tracking*	Enables you to view, edit, and create time entry templates.
Time Codes card	*Set Up: Timesheets*	Enables you to view, edit, and create time codes.
Time Code Group card	*Set Up: Time Tracking*	Enables you to view, edit, and create time code groups.
Time Calculation Tag card	*Set Up: Time Tracking*	Enables you view, edit, and create time calculation tags.
Time Entry Code card	*Set Up: Time Tracking*	Enables you to view, edit, and create time entry codes.
Time Request Code card	*Set Up: Time Tracking*	Enables you to view, edit, and create request codes.
Time Tracking Eligibility Rule card	*Set Up: Time Tracking*	Enables you to view, edit, and create time track eligibility rules.
Time Attestation Rule card	*Set Up: Time Tracking*	Enables you to view, edit, and create time attestation rules.

You can access these cards on the Schedules and Calendars page:

Item	Security	Description
Schedule Calendar Rule card	*Set Up: Calendar* *Set Up: Period Schedule*	Enables you to view, edit, and create holiday/work schedule calendar rules.
Holiday Calendar card	*Set Up: Calendar* *Set Up: Period Schedule*	Enables you to view, edit, and create holiday calendars.
Work Schedule Calendar card	*Set Up: Calendar* *Set Up: Period Schedule*	Enables you to view, edit, and create work schedule calendars.
Work Schedule Calendar Group card	*Set Up: Calendar* *Set Up: Period Schedule*	Enables you to view, edit, and create work schedule calendar groups.

You can access these cards on the Calculations and Validations page:

Item	Security	Description
Time Calculation card	*Set Up: Time Tracking* *Set Up: Time Calculations* *Process: Time Configuration Analyzer Tool*	Enables you to view, edit, and create time calculations.
Time Calculation Group card	*Set Up: Time Tracking* *Set Up: Time Calculations* *Process: Time Configuration Analyzer Tool*	Enables you to view, edit, and create time calculation groups.
Time Accumulator card	*Set Up: Time Tracking* *Set Up: Time Calculations* *Process: Time Configuration Analyzer Tool*	Enables you to view, edit, and create time accumulators.
Time Entry Validation Group card	*Set Up: Time Tracking* *Set Up: Time Calculations* *Process: Time Configuration Analyzer Tool*	Enables you to view, maintain, edit, and create time entry validation groups.

Scheduling Section

You can access these cards on the Workday Scheduling page:

Item	Security	Description
Schedule Override Settings card	Add security groups to the*Change Worker Scheduling Settings* initiating action on the *Change Worker Scheduling Settings* business process. *Set Up: Scheduling: High Level Scheduling Settings*	Enables you to: • Override schedule settings for workers. • Mass assign scheduling override settings.
Schedule Override Settings Template card	*Set Up: Scheduling: High Level Scheduling Settings*	Enables you to view, edit, add, remove, and override scheduling settings templates.
Worker Scheduling Availability card	Add security groups to the*Change Work Availability* initiating action on the *Change Work Availability* business process. *Reports: Scheduling Worker Configuration*	Enables you to view: • View worker scheduling availability. • Change work availability for workers.
Worker Schedule Tags card	Add security groups to the*Change Work Scheduling Settings* initiating action on the *Change Worker Scheduling Settings* business process.	Enables you to: • View worker schedule tags by organization. • Assign schedule tags to workers.

Item	Security	Description
	Add security groups to the*Change Worker Schedule Tags* initiating action on the *Change Worker Schedule Tags* business process.	
Meal Break Rule Set card	*Set Up: Time Tracking* *Set Up: Scheduling: High Level Scheduling Settings*	Enables you to view, edit, and create meal break rule sets.
Predictive Scheduling Rule Set card	*Set Up: Time Calculations* *Set Up: Predictive Scheduling*	Enables you to view, edit, and create predictive scheduling rule sets.
Scheduling School Types card	*Set Up: Scheduling: High Level Scheduling Settings* *Reports: Scheduling School Calendars* *Scheduling: Minor Compliance - School Calendar*	Enables you to view, edit, add, and remove scheduling school types.
Work Session Rule card	*Set Up: Scheduling: High Level Scheduling Settings* *Reports: Work Session Rules*	Enables you to view, edit, create, and delete work session rules.
Scheduling Settings card	*Set Up: Scheduling: High Level Scheduling Settings*	Enables you to view scheduling organization settings and edit schedule settings.
Scheduling Working Hours Configuration card	*Set Up: Scheduling: High Level Scheduling Settings*	Enables you to view, edit, and create scheduling validation working hours configurations.
Tenant Setup Scheduling card	*Set Up: Scheduling: High Level Scheduling Settings*	Enables you to access the Edit Tenant Setup - Scheduling task.
Scheduling Productivity Template card	*Set Up: Scheduling: High Level Scheduling Settings*	Enables you to view, edit, and create scheduling productivity templates.
Shift Profiles card	Add security groups to the*Assign Shift Profiles to Worker* initiating action on the *Assign Shift Profiles to Worker* business process. *Reports: Scheduling Worker Configuration*	Enables you to: • View worker shift profiles by organization. • Assign shift profiles to workers.
Work Schedule card	Add security groups to the*Assign Work Schedule* initiating action on the *Assign Work Schedule* business process. *Set Up: Time Tracking Reports: Time Tracking Set Up: Static Scheduling*	Enables you to: • View worker schedule calendars. • Assign work schedules. • Audit workers with multiple work schedule calendars.

Item	Security	Description
Centralized Scheduling card	*Set Up: Centralized Scheduling* *Set Up: Mass Generate Labor Demand*	Enables you to mass generate, mass publish, and mass clear schedules for organizations.
Scheduling Maintenance card	*Set Up: Scheduling: Daily Notes* *Set Up: Scheduling: Notifications* *Scheduling: Schedule and Shift Audit* *Scheduling: Cleanup Invalid Data*	Enables you to: • Maintain daily notes for scheduling organizations. • Maintain change published schedule notifications. • Access the Schedule and Shift Audit report. • Clean up invalid scheduling data.

Related Information
Examples
2025R2 Feature Release Note: HCM Admin Hub

Manager Insights Hub

Setup Considerations: Manager Insights Hub

You can use this topic to help make decisions when planning your configuration and use of Manager Insights Hub. 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

Manager Insights Hub provides managers with automated insights and actionable steps that they can take to support team career growth and development.

The Suggested Opportunities section uses machine learning to recommend personalized opportunities that managers can share with direct reports.

We support Manager Insights Hub in:

- Arabic
- Bulgarian
- Chinese (Simplified)
- Chinese (Traditional)
- Croatian
- Czech
- Danish
- Dutch
- Estonian

- Finnish
- French (Canada)
- French (France)
- German
- Greek
- Hebrew
- Hungarian
- Indonesian
- Italian
- Japanese
- Korean
- Latvian
- Lithuanian
- Malay
- Norwegian
- Polish
- Portuguese (Brazil)
- Romanian
- Russian
- Serbian
- Slovak
- Slovenian
- Spanish
- Swedish
- Thai
- Turkish
- Ukranian
- Vietnamese

Business Benefits

With Manager Insights Hub, you can enable managers to:

- Upskill and develop direct reports, supporting your organizational objectives.
- Identify career growth opportunities for direct reports, promoting employee engagement and retention.
- Leverage machine learning suggestions and insights, reducing time spent on individualized performance and career development.
- Build and support high-performing teams, fostering productivity and efficiency.

Use Cases

- Centralize and consolidate managerial tasks in a single hub to save time.
- Promote career opportunities to direct reports to support their career development.
- Use automated insights and suggestions to save time and promote action.
- View the status of in-progress job changes, create position events, and job requisition events.
- Request a compensation change or a one-time payment for an employee.
- Manage time off, leave, scheduling, and time entries for your team once you view information from the reports and cards that are related to time off, leave, scheduling, and time entries in the Time & Scheduling section.

Questions to Consider

Questions	Considerations
Which Workday features can you access in Manager Insights Hub?	Manager Insights Hub consists of different sections and cards that display insights from: • Absence • Calibration • Career Hub • Check-Ins • Compensation • Contingent Workers • Development items • Employee reviews • Feedback • Goals • Interests • Learning • Staffing • Talent Highlights • Time Tracking • Workday Peakon Employee Voice • Workday Scheduling • Workday VNDLY You can initiate some actions and business processes for these features from the Manager Insights Hub. When you don't use a feature, Manager Insights Hub doesn't display cards or tasks related to it.
How does the Manager Insights Hub work with the Career Hub?	When you use the Career Hub, the Manager Insights Hub displays suggestions for each direct report. Workday uses machine learning to suggest mentors, flex teams, connections, and learning opportunities based on direct reports' skill interests. Managers can share these opportunities for their direct reports to view in the Career Hub. You can also enable managers to create development items for their direct reports with AI assistance. See: Concept: AI-Generated Development Items on page 1531. When you enable Career Path Builder in the Career Hub, you can enable workers to share career paths so that managers can view them in the Manager Insights Hub. 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.

Questions	Considerations
Can you view suggested opportunities for direct reports when you don't use the Career Hub?	When you don't use the Career Hub but want to enable suggestions, you must configure Interests and Skills Cloud.
How does Manager Insights Hub work with Check-Ins?	Managers can view and manage check-ins from Manager Insights Hub. Cards related to Check-Ins include an Add as Topic to Check-In button. If you don't use Check-Ins, Workday provides a link to the relevant View task.
How does Manager Insights Hub work with Goals?	Manager Insights Hub displays a Goals tab. When you use the Maintain Feature Opt-Ins report to opt in to the Goals Redesign User Interface Changes feature, Workday displays the Goals Awaiting Your Action and Recently Updated Goals sections. When you have the *Manage Goals* business process configured with managers as approvers, the Goals Awaiting Your Action section includes goals that are pending manager approval. When you opt out of the Goals Redesign User Interface Changes feature, Workday displays a single card with 4 recently updated goals.
How can managers use Manager Insights Hub to view insights and suggestions for contingent workers?	Contingent workers display with [C] appended to their name and managers can view their career information and insights. Manager Insights Hub doesn't recommend suggested opportunities for contingent workers because opportunities are based on skill interests, which Workday doesn't support for contingent workers.
Who can managers view information about in Manager Insights Hub?	Managers can only access information about workers who report to them directly. Manager Insights Hub doesn't display information for workers more than 1 level removed from the manager.
How does the Manager Insights Hub relate to the My Team Management dashboard?	The Manager Insights Hub improves and builds upon the My Team Management dashboard. For your supervisory organizations, we recommend that you set up and use the Manager Insights Hub instead of the My Team Management dashboard.
Can I customize the Manager Insights Hub?	You can customize the Manager Insights Hub, such as by: • Renaming the hub, and sections. • Hiding sections, navigation items, and cards. • Including navigation items to custom reports, custom dashboards and Extend Apps. • Adding announcements to sections.

Questions	Considerations
	• Adding suggested links. See Set Up Hubs. Note: If you customize modify, add remove, or rename sections in the Manager Insights Hub, you will need to manually add all newly delivered sections, cards, and buttons.
Can managers request a compensation change, such as when an employee changes location and is eligible for a higher salary?	You can access the Request Compensation Change task to change an employees compensation. See: Steps: Propose Compensation for Employees or Positions on page 1032.
Can managers request a one-time payment for an employee as an off-cycle, special reward?	You can access the Request One-Time Payment task from the hub to pay an employee for any reason, including as a reward for completing a project ahead of schedule. See: Request One-Time Payments for Employees on page 1129.
Can I view my total rewards statement for myself or my employees?	You can access the Total Rewards Statement report on the hub. See: Steps: Set Up Total Rewards Statement on page 1221. Workday recommends that you use total rewards templates.

Recommendations

Enable the Suggested Opportunities section to recommend the best opportunities to help direct reports' careers grow and develop.

Workday also recommends using total rewards templates, and change job templates.

Requirements

Enable the Manager Insights Hub functional area and configure the *Manage: Manager Insights Hub* domain. You must have the Core HCM product area to access the hub.

Access to pages, sections, tasks, and reports depends on your organization’s Workday product subscriptions. The individual security permissions of supervisory organization managers determines what data they can view, and which tasks, reports, and cards they can use. See Reference: Manager Insights Hub on page 2944.

Limitations

- Manager Insights Hub doesn't support matrix organizations.
- If you create a custom hub title, you can't search for Manager Insights Hub in global search using that title.
- Managers can only see information for their supervisory reports. They can't see information for workers that report to their supervisory reports.
- You can't suggest Workday Learning opportunities through Manager Insights Hub.

Tenant Setup

You can select the Enable Employee Engagement in Manager Insights Hub option on the Edit Tenant Setup - HCM task to enable insights from Workday Peakon Employee Voice.

Security

Configure the *Manage: Manager Insights Hub* domain in the Manager Insights Hub functional area.

Consider the other domains that you want to enable as a part of your Manager Insights Hub setup.

Access to pages, sections, tasks, and reports depends on your organization's Workday product subscriptions. The individual security permissions of supervisory organization managers determines what data they can view, and which tasks, reports and cards they can use.

See Reference: Manager Insights Hub on page 2944.

Business Processes

Ensure that managers have the relevant security permissions for business processes in order to be able to view or initiate them from the hub.

Reporting

No impact.

Integrations

No impact.

Connections and Touchpoints

Features	Considerations
Talent Optimization	With Manager Insights Hub, you can access managerial tasks from these Talent Optimization features: • Career Hub • Check-Ins • Development items • Employee reviews • Feedback • Goals • Interests • Talent and Performance Calibration • Talent Highlights
Core HCM	With Manager Insights Hub, you can access managerial tasks from these Core HCM features: • Time Off and Leave • Advanced and Core Compensation • Staffing • Recruiting
Learning	Managers can view their team's recent learning activity.
Time Tracking	With Manager Insights Hub, you can access managerial tasks from these Time Tracking features: • Entering and Correcting Time • Reviewing and Approving Time

Features	Considerations
Workday Scheduling	With Manager Insights Hub, you can access managerial tasks from these Workday Scheduling features: • Manage Worker Schedule Settings, Preferences, and Availability • Schedule Generation and Management
Workday Peakon Employee Voice	The Employee Engagement section displays these insights: • Engagement Score • Highlighted Drivers of Engagement • Latest Comments
Workday VNDLY	From the the VNDLY Contingent Overview page, you can access: • An overview of all pending approvals in VNDLY. • Links to other frequently used actions within VNDLY. • Active work orders and their respective end dates. • The Work Order Budget Tracker, which displays an overview of your invoiced amount for contingent workers and the estimated budget. • Contingent workers in VNDLY at risk of tenure policy violation.

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: Anytime Feedback on page 1731
Setup Considerations: Career Hub on page 1543
Setup Considerations: Check-Ins on page 1764
Setup Considerations: Learning on page 1871
Setup Considerations: Performance Reviews on page 1674
Setup Considerations: Requested Feedback on page 1734
Setup Considerations: Job Changes on page 838
Setup Considerations: Talent Highlights on page 1786
Setup Considerations: Workday Peakon Employee Voice

Tasks

Set Up Change Job Templates on page 849
Configure Total Rewards Templates on page 1222
Steps: Enable AI-Generated Development Items on page 1533

Examples

2025R2 Release Note: Generate Development Items for Workers In Manager Insights Hub
2025R2 Release Note: Share Career Paths With Managers
2024R2 Feature Release Note: Manager Insights Hub

Workday Community: Languages

Steps: Set Up Manager Insights Hub

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Review the setup considerations for the Manager Insights Hub.

Context

The Manager Insights Hub provides managers with automated insights and personalized suggestions for team career growth and development. Managers can view actionable insights about their direct reports only, and they can gain visibility into team progress and activities.

Access to pages, sections, tasks, and reports depends on your organization’s Workday product subscriptions. The individual security permissions of supervisory organization managers determines what data they can view, and which tasks, reports, and cards they can use.

When you use the Career Hub, the Manager Insights Hub displays a Suggested Opportunities section that uses machine learning to recommend mentors, flex teams, and learning opportunities. You can configure it to also recommend connections. When a manager shares an opportunity with their direct report through the Manager Insights Hub, Workday displays the opportunity in the direct report's Career Hub with a Manager Suggested label. When you don't use the Career Hub but want to enable the Suggested Opportunities section, you must configure Interests and Skills Cloud.

Steps

1. Enable the Manager Insights Hub functional area.

   See Steps: Enable Functional Areas and Security Policies.
2. (Optional) Enable these functional areas.

Functional Area	Description
Core Compensation functional area (in the Core HCM product area)	You can perform basic compensation functions, including: • Creating and assigning compensation plans, such as salary and hourly plans.

Functional Area	Description
	• Creating and assigning compensation packages. • Creating eligibility rules. • Creating grades and grade steps.
Advanced Compensation functional area (in the Core HCM product area)	The Advanced Compensation functional area enables you to manage compensation review processes and give your employees merit increases, distribute bonuses, and manage stock grants.
Time Off and Leave functional area (in the Core HCM product area)	You can view information, access tasks, and take actions related to time off and leave on the Overview and Time & Scheduling sections.
Time Tracking	The Time Tracking functional area enables you to: • Define the core business process for entering and tracking time, and updating work schedules. • Set up time entry templates, time entry codes, and eligibility rules to tailor time entry to specific organizations and workers. • Track time against details such as projects, tasks, worktags, and organizations. • Set up time period schedules and map to Payroll period schedules to pull time blocks into Workday Payroll or Cloud Connect for 3rd Party Payroll. • Update and modify work schedules for employees.
Workday Scheduling	You can set up organizations and settings for Workday Scheduling, generate schedules, and enable workers to take action on them.
Performance Enablement (in the Talent Optimization product area)	You can view performance tasks for your team including: • Upcoming Check-Ins • Latest Career Activities • Team Progress

See Steps: Enable Functional Areas and Security Policies.

3. (Optional) Set up the Career Hub.

   Set up the Career Hub to enable the Suggested Opportunities section.

   See Steps: Set Up Career Hub.

4. (Optional) Set up Talent Highlights.

   Set up Talent Highlights to enable:

   - The My Team's Eligibility for Talent Highlights card in the Overview and Performance sections.
   - The Prepare for Worker's Development Conversation card in the Suggested Actions for Support section for a direct report.
   - The Talent Highlights tab for a direct report.

   See Steps: Set Up Talent Highlights on page 1790.

5. (Optional) Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   On the Innovation Services Opt-In task, select HCM Machine Learning GA Features on the Available Services tab in the HCM category.

   On the Maintain Innovation Services Data Selection Opt-In task in the HCM ML Features and Third Party Connectors GA innovation service, select Manager Insights Hub from the View Data Categories for Feature prompt. Select the opt-in check boxes for the categories for which you want to contribute data for Machine Learning:

Categories	Description
Learning Data	Select the Opt In check box to enable suggested learning opportunities.
Talent Opportunity Marketplace Data	Select the Opt In check box to enable suggested flex teams.
Worker Profile Data	Select the Opt In check box to enable suggested mentors and connections.

   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.

6. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality. The default region is the U.S.

   Security: *Set Up: Tenant Setup - Machine Learning* domain in the System functional area.

7. Edit Domain Security Policies.

   Configure these domains:

   - *Manage: Manager Insights Hub* in the Manager Insights Hub functional area. Managers must have Modify permissions to share suggested opportunities with direct reports.
   - *Worker Data: Career Connections* in the Career and Development Planning or Career Hub functional areas to enable connections in the Suggested Opportunities section.
   - *Manage: Talent Optimization in Manager Insights Hub* in the Manager Insights Hub functional area to enable Talent Optimization tasks and information.

   Configure domain security policies for other features that you want to enable in the Manager Insights Hub. See Reference: Manager Insights Hub Security.

8. Activate Pending Security Policy Changes.

9. (Optional) Set up Workday Peakon Employee Voice. See Steps: Set Up Manager Insights Hub on page 2940

   To enable the Employee Engagement section, set up Workday Peakon Employee Voice and select the Enable Employee Engagement in Manager Insights Hub check box on the Edit Tenant Setup - HCM task. You must also ensure that managers have access to:

   - A Peakon dashboard that meets the visibility thresholds set by your organization.
   - The Engagement question set.

   Note: Ensure that the Workday tenant name is mapped in Peakon Backoffice. Open a Customer Care ticket to set up tenant mapping.
10. (Optional) To enable the VNDLY Contingent Overview Page page in the Manager Insights Hub, set up the VNDLY contingent worker team. See ../../vndly/Integrations/workday-connector/steps--set-up-the-contingent-worker-hub.dita.
11. (Optional) Set Up Hubs.

    You can customize the Manager Insights Hub, such as by:

    - Renaming the hub, and sections.
    - Hiding sections, navigation items, and cards.
    - Including navigation items to custom reports, custom dashboards, and Extend Apps.
    - Adding announcements to sections.
    - Adding suggested links.

Example

You haven't subscribed to the Talent Optimization product area and the Peakon Employee Voice functional area. When you access the Manager Insights Hub, you can see the following:

- These cards on the Overview section:
  - Hiring and Staffing Summary
  - Time Offs Pending Approval
- Hiring and Staffing section.
- Time & Scheduling section.
- Budgets and Resources section.
- The My Team section, and these tabs on the worker pages:
  - Overview
  - Time & Scheduling
  - Compensation

Next Steps

Add the Manager Insights Hub worklet to the Home landing page.

Use the Configure Worklet task to add the Manager Insights Hub action to the Talent and Development worklets.

Related Information

Concepts

Setup Considerations: Workday Peakon Employee Voice

Tasks

Steps: Set Up Interests on page 1535

Set Up Worklets

Concept: Manager Insights Hub

Manager Insights Hub consolidates various tasks and reports into one central location, streamlining the ability of managers to support their teams. Managers have quick access to important tasks, reports, and in-progress business process events. They can take action on items awaiting approval, and gain insights about their team.

To use Manager Insights Hub, your organization's product subscription must include Core HCM. You can enable the Talent Optimization product area and the Peakon Employee Voice functional area to access further functionality.

Related Information

Concepts

Setup Considerations: Workday Peakon Employee Voice

Tasks

Steps: Set Up Interests on page 1535

Set Up Worklets

Reference: Manager Insights Hub

This topic lists security domains and consideration for the cards, reports, and tasks displayed in the different sections of the Manager Insights Hub:

Overview

Card	Product Area and Functional Area	Security	Description
Time Offs Pending Approval in the Awaiting Action section	Core HCM Time Off and Leave	*Worker Data: Time Off (Time Off Manager View)*	This card displays workers with time off requests that are pending approval and links to My Tasks. If there are no pending requests, we won't display information in the card.
Hiring and Staffing Summary in the Awaiting Action section	Core HCM Manager Insights Hub	*Manage: Manager Insights Hub*	This card displays pending job requisition events and job changes and links to the Hiring and Staffing Overview page.
Upcoming Absences in the Time & Scheduling section	Core HCM Time Off and Leave	*Worker Data: Time Off (Time Off Manager View)*	This card displays workers with upcoming approved time off within the next 30 days and links to the Team Absence Calendar page.
Time Entries to Review in the Time & Scheduling section.	Time Tracking	*Worker Data: Time Calendar*	This card displays the amount of workers with: • Submitted time entry hours. • No time entry hours entered. • Unsubmitted time entry hours. • Alerts at the point of time submission. The card also links to the Review and Approve Time page.
Time Offs Pending Approvals in the Time & Scheduling section.	Core HCM Time Off and Leave	*Worker Data: Time Off (Time Off Manager View)*	The card displays time off requests pending approval and links to My Tasks.
Workers Approaching Time Accumulator Threshold in the Time & Scheduling section.	Time Tracking	*Manager: Time and Scheduling Manager Hub*	The card displays workers who are close to approaching a time accumulator threshold and links to the Time

Card	Product Area and Functional Area	Security	Description
			Accumulations for Workers report.
Worker Name in the Team Career Highlights section	Talent Optimization Manager Insights Hub	*Manage: Talent Optimization in Manager Insights Hub* *Worker Data: Anytime Feedback* *Worker Data: Check-Ins* *Worker Data: Confidential Feedback* *Worker Data: Development Items* *Worker Data: Employee Goals* *Worker Data: Self Requested Feedback* *Worker Data: Role Requested Feedback*	Workday displays 1 card per direct report with up to 4 career highlights. Career highlights include overdue goals, as well as updates when there are no changes to feedback, goals, or development items in 90 days or more. Each career highlight displays for 1 month or until no longer relevant. Workday doesn't display cards for direct reports that don't have any career highlights. Workday doesn't display the Team Career Highlights section when there are no career highlights for any of the manager's direct reports.
My Team’s Eligibility for Talent Highlights in the Team Career Highlights section	Talent Optimization Manager Insights Hub	*Worker Data: Talent Highlights*	This card displays the number of direct reports who are eligible and ineligible for Talent Highlights, and links to the My Team’s Eligibility for Talent Highlights report. This report links to the Generate Talent Highlights for Employee task for eligible direct reports.
Engagement Score in the Employee Engagement section	Talent Optimization Manager Insights Hub	*Manage: Talent Optimization in Manager Insights Hub*	This card displays the engagement score from the segment that displays on the manager's Workday Peakon Employee Voice landing page when they sign in.
Highlighted Drivers of Engagement in the	Talent Optimization Manager Insights Hub	*Manage: Talent Optimization in Manager Insights Hub*	This card displays up to 3 drivers or subdrivers

Card	Product Area and Functional Area	Security	Description
Employee Engagement section			that are focus areas for the manager. Workday sorts the highlighted drivers of engagement in ascending order based on the: • Difference between the manager's score and the true benchmark. • Actual score.
Latest Comments in the Employee Engagement section	Talent Optimization Manager Insights Hub	*Manage: Talent Optimization in Manager Insights Hub*	This card displays the 3 latest comments by direct reports in their Peakon Employee Voice Survey responses, in descending order. For managers of managers, Workday displays comments from direct and indirect teams.

You can access these tasks in the Time & Scheduling Actions section:

- Request Absence
- Enter Time for Worker
- Assign Schedule Tags to Worker
- Override Scheduling Settings for Worker
- Assign Shift Profiles to Worker
- Change Schedule Preferences for Worker
- Change Work Availability for Worker

Hiring and Staffing

Hiring and Staffing Overview

You can customize the Hiring and Staffing Overview page on the Maintain Hubs report. You can add announcements. On the Hiring and Staffing Overview page:

Section	Product Area and Functional Area	Security	Description
These tasks in the Tasks and Reports section: • Create Job Requisition	Core HCM Pre-Hire Process	Add security groups to the initiating action on these business processes: • *Job Requisition*	You can use these tasks to create or close job requisitions for: • New positions

Section	Product Area and Functional Area	Security	Description
• Create Position • Close Job Requisition • Add Job • End Job		• *Create Position* • *Close Job Requisition* • *Add Additional Job*. Select the *Add Job* initiating action with the following description: Online task. • *End Additional Job*. Select the *End Job* initiating action with the following description: Related Task from Supervisory org.	• Existing positions • Multiple existing positions You can also use these tasks to contract contingent workers, and add or end additional jobs.
The Contract Contingent Worker tasks in the Tasks and Reports section.	Core HCM Pre-Hire Process	Add security groups to these initiating actions with these descriptions on the *Contract Contingent Worker* business process: • *Contract Contingent Worker*. Description: Search for pre-hires, former workers, inactive students, inactive external students, or create a new pre-hire and contract them into an open position. Also enables contracting from the related actions menu of a job requisition, supervisory organization, or an unfilled position. • *Contract Contingent*	You can use these tasks to initiate the *Contract Contingent Worker* business process.

Section	Product Area and Functional Area	Security	Description
		Worker. Description: Search for existing pre-hires, former workers, inactive students, inactive external students, or create a new pre-hire and contract them into an open position. If users have access to more than one initiating action, they'll display as separate buttons.	
The Hire Employee tasks in the Tasks and Reports section.	Core HCM Pre-Hire Process	Add security groups to these initiating actions with these descriptions on the *Hire* business process: • *Hire Employee*. Description: Search for pre-hires, former workers, inactive students, or inactive external students and hire them into an open position. Also enables hiring from the related actions menu of a job requisition, supervisory organization, or an unfilled position. • *Hire Employee*. Description: Search for existing pre-hires, former workers, inactive students, inactive external students, or create a new	You can use these tasks to initiate the *Hire* business process.

Section	Product Area and Functional Area	Security	Description
		pre-hire and hire them into an open position. Also enables hiring from the related actions menu of a job requisition, supervisory organization, or an unfilled position. • *Hire Employee*. Description: Select from existing pre-hires and former workers, or create a new pre-hire, and hire them into an open position. Also enables hiring from the related actions menu of a former worker, job requisition, pre-hire, supervisory organization, or an unfilled position. This initiating action is the only one that displays in the hub in the mobile app. • *Hire Employee*. Description: Select from existing pre-hires and former workers, and hire them into an open position. Also enables hiring from the related actions menu of a former worker, job requisition, pre-hire, supervisory organization,	

Section	Product Area and Functional Area	Security	Description
		or an unfilled position. If users have access to more than one initiating action, they'll display as separate buttons.	
The Start Job Change task in the Tasks and Reports section.	Core HCM	Add security groups to the initiating action on the *Change Job* business process.	You can use this task to initiate the *Change Job* business process for your direct reports.
The In-Progress Job Requisition Events card.	Core HCM	*Job Requisition Data* Add security groups to the View action on the *Job Requisition* business process.	This card displays the in progress *Job Requisition* events from supervisory organizations that the logged in user has the *Manager* role for. This card links to the In-Progress Job Requisition Events page.
Open and In-Progress Positions in the Team Highlights section	Core HCM	*Manage: Manager Insights Hub* Add security groups to the View action on the *Create Position* business process.	This card displays all open positions and in-progress *Create Position* events from supervisory organizations that the logged in user has the *Manager* role for.
In-Progress Job Changes in the Team Highlights section	Core HCM	*Manage: Manager Insights Hub* Add security groups to the View action on the *Change Job* business process.	This card displays any in-progress *Change Job* business process events for workers on your team. It also displays who needs to take action on the event.

In-Progress Job Requisition Events

On the In-Progress Job Requisition Events page, Workday displays the View In-Progress Job Requisition Events report that's secured to the *Job Requisition Data* domain.

Time & Scheduling

On the Time & Scheduling Overview page:

Section	Product Area and Functional Area	Security	Description
Request Absence task and Manage Absence report in the Absence Tasks & Reports section	Core HCM Time Off and Leave	Add security groups to 1 of these initiating actions: • *Request Time Off for Self* and *Request Time Off for Worker* on the *Request Time Off* business process. • *Edit Time Off for Self* and *Edit Time Off for Worker* on the *Correct Time Off* business process. • *Request Leave of Absence for Self* and *Request Leave of Absence for Worker* on the *Request Leave of Absence business* process.	You can use the Request Absence task to request time off and leave for yourself or on behalf of workers. You can use the Manage Absence 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.
Return Worker from Leave task in the Absence Tasks & Reports section	Core HCM Time Off and Leave	Add security groups to the initiating action on the *Request Return from Leave of Absence* business process.	You can use this task to record a worker's return from a leave of absence.
Worker Time Off Balance Details report in the Absence Tasks & Reports section	Core HCM Time Off and Leave	*Worker Data: Time Off (Time Off Balances)*	You can use this report to view details of time off balances for workers.
Enter Time for Worker task in the Time Tracking Tasks & Reports section	Time Tracking	*Worker Data: Time Calendar*	You can use this task to input the hours worked by a specific employee.
My Team's Time Requests report in the Time Tracking Tasks & Reports section	Time Tracking	*Worker Data: My Team's Time Requests*	You can use this report to review overtime requests submitted by your team members.
Time Clock History report in the Time Tracking Tasks & Reports section	Time Tracking	*Worker Data: View/Edit Time Clock Events*	You can use this report to review and add time clock events.
Assign Work Schedule task in the Time Tracking Tasks & Reports section	Time Tracking	Add security groups to the *Assign Work Schedule* initiating action on the *Assign Work*	You can use this task to manually assign work schedules to workers.

Section	Product Area and Functional Area	Security	Description
		Schedule business process.	
Assign Custom Work Schedule	Time Tracking	Add security groups to the *Assign Custom Work Schedule* initiating action on the *Assign Custom Work Schedule* business process.	You can use this task to manually assign custom work schedules to workers.
My Team's Schedule report in the Time Tracking Tasks & Reports section	Time Tracking	*Worker Data: Work Schedule*	You can use this report to display the work schedule of your team and the availability of team members.
Assign Shift Profiles to Worker in the Scheduling Tasks & Reports section	Workday Scheduling	Add security groups to the *Assign Shift Profiles to Worker* initiating action on the *Assign Shift Profiles to Worker* business process.	You can use this task to complete shift profile assignments for workers.
Assign Schedule Tags to Worker in the Scheduling Tasks & Reports section	Workday Scheduling	Add security groups to the *Assign Schedule Tags to Workers* initiating action on the *Change Worker Schedule Tags* business process.	You can use this task to assign schedule tags to a worker and include them in a schedule.
Change Schedule Preferences for Worker in the Scheduling Tasks & Reports section	Workday Scheduling	Add security groups to the *Change Schedule Preferences for Worker* initiating action on the *Change Schedule Preferences* business process.	You can use this task to change a worker's preferred schedule.
Override Scheduling Settings for Worker in the Scheduling Tasks & Reports section	Workday Scheduling	Add security groups to the *Override Scheduling Settings* initiating action on the *Change Worker Schedule Settings* business process.	You can use this task to override schedule settings, validations, and rules for workers.
Change Worker Availability in the Scheduling Tasks & Reports section	Workday Scheduling	Add security groups to the *Change Work Availability* initiating action on the *Change Work Availability* business process.	You can use this task to change and update the week days and times that a worker is availability for a schedule.
Upcoming Absences card in the Recommended for You section	Core HCM Time Off and Leave	*Worker Data: Time Off (Time Off Manager View)*	This card displays workers with upcoming absences within the next 30 days, as of the current date, and links

Section	Product Area and Functional Area	Security	Description
			to the Team Absence Calendar page.
Time Entries to Review card in the Recommended for You section	Time Tracking	*Worker Data: Time Calendar*	This card displays the amount of workers with: • Submitted time entry hours. • No time entry hours entered. • Unsubmitted time entry hours. • Time entry hour alerts. The card also links to the Review and Approve Time page.
Not Checked In (Time) card in the My Team Today section	Time Tracking	*Worker Data: View/Edit Time Clock Events*	This card displays all workers who haven't checked in and their scheduled start time has passed.
Checked In (Time) card in the My Team Today section	Time Tracking	*Worker Data: View/Edit Time Clock Events*	This card displays all workers currently checked in.
Workers Missing a Meal or Break card in the My Team Today section	Time Tracking	*Manager: Time and Scheduling Manager Hub*	This card displays all workers missing a meal or break time per the Meal and Break Rule Set on their Time Entry Template.
Time Offs Pending Approval card in the Needs Review section	Core HCM Time Off and Leave	*Worker Data: Time Off (Time Off Manager View)*	This card displays workers with time off requests that are pending approval and links to My Tasks.
Workers Approaching Time Accumulator Threshold card in the Needs Review section	Time Tracking	Manager: Time and Scheduling Manager Hub	The card displays workers who are close to approaching a time accumulator threshold and links to the Time Accumulations for Workers report.
Workers Returning from Leave card in the Needs Review section	Core HCM Time Off and Leave	*Worker Data: Leave of Absence*	This card displays workers currently on leave who are estimated to return within the next 2 weeks and links to the

Section	Product Area and Functional Area	Security	Description
			Workers Returning from Leave report.
Workers on Leave card in the Needs Review section	Core HCM Time Off and Leave	*Worker Data: Leave of Absence*	This card displays workers who are on leave as of the current date and links to the Workers on Leave report.

Team Absence Calendar

On the Team Absence Calendar page, Workday displays the Team Absence Calendar report (secured to the *Worker Data: Team Absence Calendar* domain). You can use the Team Absence Calendar report to analyze absence requests so that you can better manage team resources. See Concept: Absence Calendar Experience on page 2252.

Edit and Approve Time

On the Edit and Approve Time page, Workday displays the Edit and Approve Time report (secured to the *Manager: Time Tracking Manager Edit and Approve* domain). You can use this report to review, correct, send back, or deny worker time entries, as well as mass submit and approve time entries for multiple workers. See Concept: Edit and Approve Time on page 2903.

Review and Approve Time

On the Review and Approve Time page, Workday displays the Review Time report (secured to the *Manager: Time Tracking Manager Approval* domain). You can use the Review Time report to review, approve, deny, or send back the recorded work hours for team members. See Set Up the Review Time Report on page 2882.

Scheduled vs. Actuals

On the Scheduled vs. Actuals page, Workday displays the View Scheduled vs. Actual Hours for Workers report (secured to the *Worker Data: Reports and Worker Data* domain and the *Worker Data: Work Schedule* domain). You can use this report to compare the scheduled hours and the actual hours for team members. See Set Up Scheduled vs. Actuals Reporting on page 2889.

Budget and Resources

To use this section, set up the Core Compensation functional area (in the Core HCM product area). Each managers' security permissions determines the data that they can view. On the Team Compensation Summary page, Workday displays the Team Compensation Summary report that's secured to the*Reports: Manager* domain. Provided a manager has security access to view compensation details for their team, the report contains these fields:

- Base Pay Range
- Compa-ratio
- Job Profile
- Time in Position
- Total Base Pay
- Worker

On the Budget & Resources Overview page, we display:

- The Pay Range Analysis, Employee Grade Pay Range Analysis, and Bonus Payment History reports (secured to the *Worker Data: Compensation by Organization* domain).
- The Target vs. Actual Bonus Payment report (secured to the *Worker Data: Compensation Management by Organization* domain).

- The Employee Benchmark Data button and Internal Compensation Benchmark for Workers button that enable you to access the corresponding reports.

Card	Product Area and Functional Area	Security	Description
Pay Analysis	Core HCM Advanced Compensation	*Worker Data: Compensation by Organization*	This card displays links that enable you to access the Pay Range Analysis report and the EE Grade Pay Range Analysis report. You can use these reports to analyze pay alignment to established ranges across different job levels.
Bonus Payment History	Core HCM Advanced Compensation	*Worker Data: Compensation by Organization*	This card displays a link that enables you to access the Bonus Payment History report. You can use this report to view bonus history for your organizations.
Target vs. Actual Bonus Payments	Core HCM Advanced Compensation	*Worker Data: Compensation Management by Organization*	This card display a link that enables you to access the Target vs. Actual Bonus Payment report. You can use this report to compare your employees' actual bonus against their target bonus.

Performance

To use the Performance Overview page and its content:

- Your Workday subscription must include Talent Optimization, that is, the Talent Optimization SKU or Talent Optimization Add-On SKU.
- You must configure the *Manage: Talent Optimization in Manager Insights Hub* domain, as well as the domains that secure each card you want to use.

Each managers’ Product Area security permissions will determine the data that they can view, and the tasks they can run on the cards.

You can customize the Performance Overview page on the Maintain Hubs report. You can add announcements within the Performance section.

On the Performance Overview page, you can access:

- The 3 most recent calibration events awaiting action.
- An Open Calibration button that you can use to view the specific calibration events.
- The My Team’s Calibration History report for a selected team.

Card	Product Area and Functional Area	Security	Description
Goals in the Completed in the Past 3 Months section	Talent Optimization Performance Enablement	*Worker Data: Employee Goals*	This card displays goals that direct reports have completed. The Completed in the Past 3 Months section only displays when direct reports have completed goals, flex teams, or mentorships in the past 3 months.
Flex Teams in the Completed in the Past 3 Months section	Talent Optimization Talent Marketplace	*Worker Data: Flex Teams*	This card displays flex teams that direct reports have completed. The Completed in the Past 3 Months section only displays when direct reports have completed goals, flex teams, or mentorships in the past 3 months.
Mentorships in the Completed in the Past 3 Months section	Talent Optimization Functional areas: • Career and Development Planning • Worker Profile and Skills	*Worker Data: Mentoring*	This card displays mentorships that direct reports have completed. The Completed in the Past 3 Months section only displays when direct reports have completed goals, flex teams, or mentorships in the past 3 months.
Worker Name in the Latest Career Activity section	Talent Optimization Functional areas: • Career and Development Planning • Performance Enablement • Worker Profile and Skills • Manager Insights Hub	*Worker Data: Anytime Feedback* *Worker Data: Check-Ins* *Worker Data: Confidential Feedback* *Worker Data: Development Items* *Worker Data: Employee Goals* *Worker Data: Self Requested Feedback*	Workday displays 1 card per direct report with their most recent career activity.

Card	Product Area and Functional Area	Security	Description
		Worker Data: Role Requested Feedback	
Upcoming Check-Ins in the Check-Ins section	Talent Optimization Performance Enablement	*Self-Service: Check-Ins*	This card displays up to 4 upcoming check-ins with direct reports. It's blank when there are no upcoming check-ins.
My Team’s Eligibility for Talent Highlights in the Team Career Highlights section	Talent Optimization Manager Insights Hub	*Worker Data: Talent Highlights*	This card displays the number of direct reports who are eligible and ineligible for Talent Highlights, and links to the My Team’s Eligibility for Talent Highlights report. This report links to the Generate Talent Highlights for Employee task for eligible direct reports.
My Team's Goals in the Team Progress section	Talent Optimization Performance Enablement	*Worker Data: Employee Goals*	This card displays the team's progress towards achieving their goals.
My Team's Learning in the Team Progress section	Learning Learning Core	*Person Data: Learning*	This card displays up to 4 courses that direct reports on the team are enrolled in and enables managers to view the status.

My Team

View My Team

You can view an overview card for each direct report that you have access to. You can also select these buttons:

- View Org Chart (secured to the *Reports: Navigate Organization* and *View: People-View Org Chart* domains). The button enables you to navigate an organization.
- View Matrix Organization button (secured to the *Self-Service: Organization* and *Worker Data: Organizations* domains). The button only displays for managers with leadership roles on a matrix organizations. The button launches the Matrix Organization report, and enables you to view an organization as of an effective date.
- Go to Contingent Workers button (secured to the *Manage: Manager Insights Hub* domain). The button enables you to access the Contingent Workers Overview page.

Header

On each direct report's page, Workday displays a header with metrics.

Metric	Product Area and Functional Area	Security	Description
Skills	Talent Optimization Worker Profile and Skills	*Person Data: Skills*	This metric indicates the number of skills that the direct report has added to their profile.
Skill Interests	Talent Optimization Career and Development Planning	*Worker Data: Interests*	This metric indicates the number of skills that the direct report has expressed interest in.
Development Items	Talent Optimization Functional areas: • Career and Development Planning • Performance Enablement	*Worker Data: Development Items*	This metric indicates the number of in-progress development items for the direct report.
Goals	Talent Optimization Performance Enablement	*Worker Data: Employee Goals*	This metric indicates the number of in-progress goals for the direct report.

Overview Tab

Card	Product Area and Functional Area	Security	Description
Start Job Change section.	Core HCM	Add security groups to the initiating action on the *Change Job* business process.	Enables you to start a job change for a worker. This section will display Change Job templates if you've configured them.
Get Feedback on How Worker is Doing in the Suggested Actions for Support section	Talent Optimization Functional areas: • Worker Profile and Skills • Performance Enablement	*Self-Service: Anytime Feedback* *Worker Data: Anytime Feedback* *Worker Data: Self Requested Feedback* *Worker Data: Role Requested Feedback*	This card displays when the direct report doesn't receive feedback in 90 days. The card displays for 1 month or until no longer relevant. When the manager takes the suggested action, this card disappears and Workday displays the next suggested action.
Help Worker Progress Their Development Items in the Suggested	Talent Optimization Functional areas:	*Worker Data: Development Items*	This card displays when the direct report doesn't update development

Card	Product Area and Functional Area	Security	Description
Actions for Support section	• Career and Development Planning • Performance Enablement		items for more than 90 days. The card displays for 1 month or until no longer relevant. When the manager takes the suggested action, this card disappears and Workday displays the next suggested action.
Help Worker Progress Their Goals in the Suggested Actions for Support section	Talent Optimization Performance Enablement	*Worker Data: Employee Goals*	This card displays when the direct report doesn't update goals for more than 90 days. The card displays for 1 month or until no longer relevant. When the manager takes the suggested action, this card disappears and Workday displays the next suggested action.
Check On Worker's Goal Timeline in the Suggested Actions for Support section	Talent Optimization Performance Enablement	*Worker Data: Employee Goals*	This card displays when the direct report has overdue goals. The card displays for 1 month or until no longer relevant. When the manager takes the suggested action, this card disappears and Workday displays the next suggested action.
Prepare for Worker’s Development Conversation in the Suggested Actions for Support section	Talent Optimization Manager Insights Hub	*Worker Data: Talent Highlights*	This card links to the Generate Talent Highlights for Employee task for eligible direct reports who have no new talent highlights within the past 90 days. The card displays for 1 month or until no longer relevant.
Goals in the Completed in the Past 3 Months section	Talent Optimization Performance Enablement	*Worker Data: Employee Goals*	This card displays goals that the direct report has completed.
Flex Teams in the Completed in the Past 3 Months section	Talent Optimization Talent Marketplace	*Worker Data: Flex Teams*	This card displays flex teams that the direct report has completed.

Card	Product Area and Functional Area	Security	Description
Mentorships in the Completed in the Past 3 Months section	Talent Optimization Functional areas: • Career and Development Planning • Worker Profile and Skills	*Worker Data: Mentoring*	This card displays mentorships that the direct report has completed.
Mentors cards in the Suggested Opportunities for Worker Based on Skill Interests section	Talent Optimization Functional areas: • Career and Development Planning • Worker Profile and Skills • Contact Information • Staffing	*Worker Data: Interests* *Worker Data: Mentoring* To display additional mentor information: • *Person Data: Work Email* • *Person Data: Work Address* • *Worker Data: Time in Position*	When you set up Career Hub to enable the Suggested Opportunities section, up to 3 cards display with information on suggested mentors.
Flex Teams cards in the Suggested Opportunities for Worker Based on Skill Interests section	Talent Optimization Functional areas: • Career and Development Planning • Talent Marketplace	*Worker Data: Flex Teams* *Worker Data: Interests*	When you set up Career Hub to enable the Suggested Opportunities section, up to 3 cards display with information on suggested flex teams.
Connections cards in the Suggested Opportunities for Worker Based on Skill Interests section	Talent Optimization Functional areas: • Career and Development Planning • Career Hub • Talent Marketplace	*Worker Data: Career Connections* *Worker Data: Interests*	When you set up Career Hub to enable the Suggested Opportunities section, up to 3 cards display with information on suggested connections.
Learning cards in the Suggested Opportunities for Worker Based on Skill Interests section	Learning Learning Core	*Person Data: Learning*	When you set up Career Hub to enable the Suggested Opportunities section, up to 3 cards display with information on suggested learning content.

Development Items & Interests Tab

Card	Product Area and Functional Area	Security	Description
Generate a Development Item for Worker	Talent Optimization Functional areas: • Career and Development Planning • Manager Insights Hub	*Worker Data: GenAI Development Items*	This card enables you to generate a development item for the direct report, with AI assistance to draft the development item. You can set up excluded locations and location hierarchies for AI-generated development items. Managers with primary or additional positions in excluded locations cannot view this card.
Development Items	Talent Optimization Functional areas: • Career and Development Planning • Performance Enablement	*Worker Data: Development Items*	This card displays up to 4 in-progress development items for the direct report.
Interests	Talent Optimization Career and Development Planning	*Worker Data: Interests*	This card displays job profiles, skill interests, and career preferences and interests for the direct report.

Career Path Tab

Card	Product Area and Functional Area	Security	Description
Career Path Shared By Worker	Talent Optimization Functional areas: • Career and Development Planning • Career Hub	*Worker Data: Career Path*	Managers can view this card when the direct report has a shared career path. This card displays the moves in the career path and enables managers to view each job profile.
Generate a Development Item for Worker	Talent Optimization Functional areas: • Career and Development Planning • Manager Insights Hub	*Worker Data: Career Path* *Worker Data: GenAI Development Items*	This card enables you to generate a development item for the direct report, with AI assistance to draft the development item. You can set up excluded locations and location hierarchies

Card	Product Area and Functional Area	Security	Description
			for AI-generated development items. Managers with primary or additional positions in excluded locations cannot view this card.
Match Analysis for the Next Role	Functional areas: • Career and Development Planning • Career Hub	*Worker Data: Career Path* *Person Data: Skills* to view matched skills and skill gaps. *Worker Data: Interests* to view matched skill interests.	Managers can view this card when the direct report has a shared career path. For the next job profile in the career path, this card displays Skills Matched, Skills Needed, and Matched Skill Interests.
Career Path Details	Talent Optimization Functional areas: • Career and Development Planning • Career Hub	*Worker Data: Career Path*	Managers can view this section when the direct report has a shared career path. This section shows the name and creation date for the career path.

Goals Tab

When you opt in to the Goals Redesign User Interface Changes feature, Workday displays these cards.

Card	Product Area and Functional Area	Security	Description
Goals cards in the Goals Awaiting Your Action section	Talent Optimization Performance Enablement	*Worker Data: Employee Goals*	Cards display goals that are: • Saved for later by managers. • Overdue. • Pending the manager Review step in the business process.
Goals cards in the Recently Updated Goals section	Talent Optimization Performance Enablement	*Worker Data: Employee Goals*	Cards display recently updated goals.

Check-Ins Tab

Section	Product Area and Functional Area	Security	Description
Check-Ins	Talent Optimization Performance Enablement	*Self-Service: Check-Ins*	This section displays existing check-ins. It enables managers to create, archive, edit, and view check-ins for the direct report.
Topics	Talent Optimization Performance Enablement	*Self-Service: Check-Ins*	This section displays check-in topics. It enables managers to create, archive, edit, and view check-in topics for the direct report.

Reviews Tab

Card	Product Area and Functional Area	Security	Description
Start Employee Review for Worker	Talent Optimization	These business processes: • *Start Development Plan* • *Start Disciplinary Action* • *Start Performance Improvement Plan* • *Start Performance Review*	This card displays buttons that enable you to start different types of employee reviews.
In Progress Reviews	Talent Optimization Performance Enablement	The *Worker Data: Employee Reviews* domain These business processes: • *Start Development Plan* • *Start Disciplinary Action* • *Start Performance Improvement Plan* • *Start Performance Review*	This card displays any in-progress reviews for the direct report.
Completed Reviews	Talent Optimization Performance Enablement	The *Worker Data: Employee Reviews* domain These business processes: • *Start Development Plan*	This card displays completed reviews for the the direct report.

Card	Product Area and Functional Area	Security	Description
		• *Start Disciplinary Action* • *Start Performance Improvement Plan* • *Start Performance Review*	

Feedback Tab

Card	Product Area and Functional Area	Security	Description
Requested Feedback	Talent Optimization Functional areas: • Worker Profile and Skills • Performance Enablement	*Worker Data: Role Requested Feedback* *Worker Data: Self Requested Feedback* *Worker Data: Private Feedback* *Worker Data: Confidential Feedback*	This card displays feedback for the direct report: • The feedback requestor's profile picture and name in the Requested by field. • The Request Sent field displays the date that the feedback event was submitted. • The Responses field displays the number of peers invited to submit feedback and how many have responded. The count doesn't include confidential feedback. • The Feedback On field displays the number of questions in the event side panel report. • The View Responses link displays the details in the View Requested Feedback side panel.

Card	Product Area and Functional Area	Security	Description
Anytime Given Feedback	Talent Optimization Functional areas: • Worker Profile and Skills • Performance Enablement	*Worker Data: Anytime Feedback* *Worker Data: Private Feedback* *Worker Data: Confidential Feedback*	This card provides color-coded labels to help managers quickly identify the feedback visibility. • Confidential feedback has a red label with NOT VISIBLE TO and the name of the worker that the feedback is provided for. • Private feedback has a yellow PRIVATE label. • Shared nonprivate feedback doesn’t have a color-coded label. • A View link to the View Anytime Given Feedback side panel.

Compensation Tab

Card	Product Area and Functional Area	Security	Description
Request Compensation Change task in the Tasks and Reports section	Core HCM Core Compensation	Configure access to the domain for each plan type in both the Core Compensation and the Advanced Compensation functional areas. For employees managed by a compensation basis total, *Compensation Change: Compensation Basis Details* domain in the Core Compensation functional area	You can change an existing employee's compensation.
Request One-Time Payment task in the Tasks and Reports section	Core HCM Core Compensation	*Request: One-Time Payment* in the Core Compensation functional area.	You can request a one-time payment for an employee for a referral bonus, a retention

Card	Product Area and Functional Area	Security	Description
			incentive, or for any other reason.
Total Rewards Statement	Core HCM Core Compensation	• *Reports: Total Rewards Statement (Results - Security based on Pay Component Security)* domain in the Core Payroll functional area. • *Set Up: Total Rewards* domain in the Core Compensation functional area. • *Set Up: Compensation* domain in the Core Compensation functional area.	The Total Rewards Statement provides a breakdown of base pay, bonuses, health and other benefits, stock, commissions, and so on.

Calibration Tab

On the Calibration tab, you can access the Summary of Calibration History. The Summary of Calibration History displays the effective date, review ratings, and potential for each previous calibration of a specific worker.

Contingent Worker Team

Contingent Workers Page

Section	Product Area and Functional Area	Security	Description
Contingent Workers	Core HCM Staffing	Security:*Manage: Manager Insights Hub*	You can view active contingent workers in Workday and enables you to access their individual profiles.

VNDLY Contingent Overview Page

To use the VNDLY Contingent Overview Page:

- Your Workday subscription must include Workday VNDLY.
- You need to set up the VNDLY contingent work team. See ../../vndly/Integrations/workday-connector/steps--set-up-the-contingent-worker-hub.dita.

Section	Product Area and Functional Area	Security	Description
VNDLY Actions	Workday VNDLY	Security: *Security Administration* in the System functional area.	You can view an overview of all pending approvals in VNDLY and access links to other frequently used actions within VNDLY.
High Priority Items	Workday VNDLY	Security: *Security Administration* in the System functional area.	You can view: • Active work orders and their respective end dates. • The Work Order Budget Tracker, which displays an overview of your invoiced amount for contingent workers and the estimated budget. • Contingent workers in VNDLY at risk of tenure policy violation.

Related Information

Tasks

Steps: Enable Functional Areas and Security Policies

Reference: HCM Hubs

Workday provides these HCM hubs that enable you to easily access tasks, reports, and information in a centralized location:

- HCM Admin Hub
- Manager Insights Hub
- Benefits and Pay Hub
- Career Hub
- Job Architecture Hub
- Jobs Hub
- Recruiting Hub
- HR Partner Hub
- Time Tracking Hub
- Time and Scheduling Hub

Worklets and Reports for Human Capital Management

Add Worklets to Business Processes

Prerequisites

- Access the Business Process Steps Enabled for Worklets report to see the enabled steps for worklets.
- Access the Business Process Security Policies for Functional Area report to determine which security groups have permission to perform those steps.
- Security: *Manage: All Custom Reports*, *Security Administration*, and *Business Process Administration* domains in the System functional area.

Context

Worklets display relevant analytic information within the context of a business process, enabling you to make more informed decisions. There are 2 options:

- Workday delivers a number of preconfigured worklets.
- You can create your own worklet from a custom report.

Workday defines which business processes can have embedded worklets and the steps they're available on. Only the default definition of a business process can have an embedded worklet on the *Initiation* step. Custom business process definitions inherit the *Initiation* step worklets from the default definition.

When you embed worklets in a business process, specify:

- How to display the worklet.
- Who has permission to view the worklet.
- Values for any worklet prompts.

Steps

1. To enable a custom worklet for use in a business process:
    a) Access the Edit Custom Report task.
    b) Click Output.
    c) Expand the Worklet Options area.
    d) Select the Enable As Worklet check box.
    e) Click the Available on prompt and select *Embedded on Tasks*.
2. Enable users to view the related worklet. The procedure is different for each worklet type.

    Note: When you add the worklet to your business process, you can remove security groups but not add them.

Option	Description
Delivered Worklet	a. Access the View Security for Securable Item report. b. In the Domain Item field, enter the worklet name. c. If you want to change the permitted security groups, as a related action on the Security Policy, select Domain Security Policy > Edit Permissions.

Option	Description
Custom Worklet	a. Access the Edit Custom Report task. b. Click Share. c. Under Report Definition Sharing Options, select either *Share with all authorized users* or *Share with specific authorized groups and users*. d. If you selected *Share with specific authorized groups and users*, select the Authorized Groups and Authorized Users.

3. Add the worklet to the business process by selecting Business Process > Maintain Related Worklets from the related actions.

Result

Depending on the way you configure the worklet, you might see the analytic information automatically. You can also click the button in the upper right corner to open the worklet. If you're not in a security group with permission to view the worklet, Workday hides the related information button.

Related Information

Concepts

Concept: Custom Worklets

Tasks

Embed Related Worklets in Business Processes

Reference

Reference: Embedded Analytics for HCM on page 2971

Concept: Key HCM Reports by Functional Area

Standard Reports

Workday delivers standard reports for each functional area in Human Capital Management. You can browse for these reports in several ways:

- Access Workday Standard Reports and select categories of interest.
- Select Sitemap from the main menu and navigate by category to view the standard reports in each functional area.
- Use search to find reports by keyword, such as *merit* or *job*.

In addition, Workday delivers trending reports that enable you to analyze trends in worker data over the previous 36 periods. Access these reports through search.

Category	Trending Reports
Activity Reports	• Hires and Terminations by Quarter • Quarterly Turnover by Organization • Terminations by Performance Rating and Quarter • Terminations by Type and Quarter • Turnover Rate by Supervisory Hierarchy and Quarter
Audit Report	• Worker Trending Audit

Category	Trending Reports
Compensation Reports	• Average Compa-Ratio by Job Profile and Quarter • Average Total Compensation by Country and Quarter
Headcount Reports	• Headcount and FTE by Month • Headcount by Supervisory Organization Hierarchy and Month • Span of Control by Quarter

You can also build custom trending reports based on the Trended Workers data source. Rather than starting from scratch, use the delivered reports as a starting point and select different facets or drill-down options. Access the Maintain Trended Worker Organizations task to select up to 10 organization types to report on for trended worker data.

Custom Reports

Many resources are available to help you write custom reports:

- Reporting topics in the Workday documentation.
- Reporting at a Glance documents in the Workday Community help you build custom reports, calculated fields, and analytics in specific areas.

Related Information
Concepts
Concept: Custom Reports
Concept: Trending Reports
Reference
Reporting Tips: Benefit Enrollment Events and Elections

Reference: Embedded Analytics for HCM

You can make analytic information available to decision makers by embedding worklets in business processes. These worklets provide contextual information in specific business process steps so managers can make more informed decisions. Worklets are either:

- Custom reports that you create and enable as worklets.
- Preconfigured by Workday based on standard reports as shown in the table. Use these reports for steps in compensation, staffing, and talent business processes.

Worklet	Related Business Processes
Average Market Salary for This Job	*Job Requisition* *Job Requisition Change* *Request Compensation Change*
Average Merit Increase by Performance	*Propose Employee Merit Award*
Company Assets Assigned to a Worker	*Termination*
Compensation Details for Job Requisition	*Propose Compensation Offer/Employment Agreement*
Direct Reports Market Position	*Request Compensation Change*
Employee Merit Rating Distribution	*Propose Employee Merit Award*

Worklet	Related Business Processes
Employee Talent Analysis	*Change Job* *Request One-Time Payment*
Feedback for Employee	*Complete Manager Evaluation for Performance Review*
Grade Analytics	*Propose Compensation* *Propose Compensation Change* *Request Compensation Change*
Headcount Plan to Pipeline	*Job Requisition*
Job Openings In Organizations I Manage	*Job Requisition* *Job Requisition Change* *Request Compensation Change*
Market Data - Position	*Propose Compensation* *Propose Compensation Change* *Request Compensation Change*
Most Recent Talent Highlights for Worker	*Assess Potential* *Complete Manager Evaluation for Performance Review* *Talent Review*
My Team's Review Ratings	*Complete Manager Evaluation for Performance Review*
Our Average Salary for This Job	*Job Requisition* *Job Requisition Change* *Request Compensation Change*
Performance Review Ratings	*Assess Potential* *Complete Manager Evaluation for Performance Review* *Request One-Time Payment* *Talent Review*
Potential Candidates	*Manage Succession Plan*
Stock Summary	*Assess Potential*
Succession Plan Analysis	*Manage Succession Plan*

Related Information

Tasks

Add Worklets to Business Processes on page 2969

Reference: FTE Report

You can use the FTE Report to view a count of FTE (full-time equivalent) workers by organization. You can use the numbers to create summarizations by category.

Field	Description
Total FTE	The number of positions and headcount for the organization. Includes both filled and unfilled positions.
FTE Filled	The number of filled positions and headcount for the organization selected. Example: A position with a worker assigned.
FTE Unfilled	The number of open positions and headcount. Example: A position without a worker assigned.
FTE Available	The number of open positions and headcount that you can hire into. Example: An open position has an availability date that's currently effective.
FTE Unavailable	The number of open positions and headcount that you can't hire into. Example: A frozen position.

Example: Map Worklet Prompts

This example illustrates how to map worklet prompts to fields in a business process.

Context

Jerry is an administrator who wants to map the prompts in the My Team's Review Ratings worklet to fields in the *Complete Manager Evaluation for Performance Review* business process. This gives Jerry's users more context when they use the worklet.

Compensation Change

The Average Market Salary For This Job worklet has 1 prompt. When Jerry adds this worklet to the *Request Compensation Change* business process, he configures the prompt as follows:

Prompt Field	Value Type	Business Object	Field
Job Profile	Determine Value at Runtime	Event	Job Profile - Current

The Job Profile prompt maps to Workday-delivered report fields:

- Event
- Job Profile - Current

When Jerry completes the business process, the worklet displays the average market salary for jobs based on this job profile.

Steps

1. Access the *Complete Manager Evaluation for Performance Review business process definition*.
2. As a related action on the business process definition, select Business Process > Maintain Related Worklets.
3. In the left pane, select step *a - Complete Manager Evaluation for Performance Review*.
4. Click Maintain Step Related Worklets.
5. Click Add.
6. In the Worklet Prompts section, map the prompt fields as shown:

Prompt Field	Value Type	Business Object	Field
Review Templates	Determine Value at Runtime	Manager Evaluation	Review Template
Organizations	Determine Value at Runtime	Employee	Supervisory Organization

Next Steps

When Jerry runs the business process, the worklet displays ratings from reviews that:

- Use the same template.
- Are in the same supervisory organization as the current process.

Some managers who perform the evaluations might have a location hierarchy role rather than a supervisory organization role. To account for these mangers, Jerry maps the Organizations prompt to the Location Hierarchy field instead of Supervisory Organization.

Related Information
Tasks
Add Worklets to Business Processes on page 2969

HCM Innovation Services

Workday Assistant

Setup Considerations: Workday Assistant

You can use this topic to help make decisions when planning your configuration and use of Workday Assistant. 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 Assistant is a conversational tool that helps workers to quickly complete actions and retrieve information in Workday.

When you enable Workday Assistant and search for something in Workday, you can access Assistant-supported capabilities as machine learning-enhanced search results.

You can use Workday Assistant in these languages:

- Dutch
- English
- French (Canada)
- French (continental)
- German
- Italian
- Japanese
- Korean
- Spanish

Business Benefits

Workday Assistant can:

- Increase efficiency by reducing the time it takes for workers to find information and complete tasks in Workday.
- Provide customized responses, enabling you to surface the most relevant resources for your workers.
- Reduce Help cases by recognizing natural-language queries and enabling workers to locate tasks and reports they don't know the exact names for.

Use Cases

Examples: You can configure Workday Assistant to enable workers to:

- Clock in and out.
- Give feedback.
- Request time off.
- View and update personal information.

Examples: You can configure Workday Assistant to enable managers to:

- Change workers' job details.
- View and manage their team.
- View job requisitions.

Questions to Consider

Question	Considerations
On which platforms do you want to run Workday Assistant?	You can use Workday Assistant on: • Desktop. • Mobile. • Workday for Microsoft Teams. • Workday for Slack.
Who can use Workday Assistant?	Workday Assistant is available to all workers. You can configure Workday Assistant to help infrequent users of Workday to discover information, complete tasks, and get help.

Question	Considerations
What actions do you want to enable workers to complete using Workday Assistant?	You can configure Workday Assistant to enable workers to access information and complete common tasks in Workday. Examples: Workers can enter phrases like these into Workday Assistant: • Change my marital status. • How much vacation time do I have? • Request time off. • Tell me a joke. • What is my hire date? Workers can view the capabilities available to them in Workday Assistant by entering *What can you do?* or *Show available capabilities*.

Recommendations

You can enable:

- Workday Help to enable workers to access knowledge articles and open Help cases from Workday Assistant.
- Workday for Microsoft Teams or Workday for Slack to enable workers to access Assistant capabilities from their Slack or Microsoft Teams workspace.

Requirements

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.

Limitations

Workers can only attach files to their conversations with Workday Assistant when they open Help cases.

Workday delivers new Assistant capabilities in English, and provides translations for those capabilities as soon as possible. Workers who select a non-English preferred language might not be able to access some capabilities immediately.

Workday Assistant doesn't support:

- Custom labels.
- Integrations with other conversational tools.
- Pre-hire workers.
- Proxy users.

Workday Assistant supports these capabilities in chat, but not in search results:

- Custom help contact
- View direct report’s anniversary
- View direct report’s birthday
- View direct report’s check-in or check-out
- View direct report’s time off

Tenant Setup

Configure tenant-wide options for Workday Assistant on the Edit Tenant Setup - Assistant task.

Security

Configure these domains in the System functional area:

Domain	Considerations
Assistant	Enables Workday Assistant.
Assistant Usage Reports	Enables you to access and configure the Assistant Usage Reports discovery board to view data visualizations of how your workers interact with Assistant.
Bots	Enables Workday Assistant .
Manage Bot and User Conversations	Enables you to access the: • Get Conversation Data report. • Purge Bot Conversation Data task. • Purge Conversation Message Data report.
Manage: Innovation Services	Enables you to manage your Innovation Services.
Set Up: Tenant Setup - Assistant	Enables you to configure and manage Workday Assistant capabilities.

To enable specific capabilities for Workday Assistant, configure the security domains for each capability. Example: To enable time tracking in Assistant, configure the *Set Up: Time Tracking* domain.

Business Processes

No impact.

Reporting

Reports or Dashboards	Considerations
Assistant Usage Reports discovery board	Displays data visualizations for how your users interact with Workday Assistant. Examples: You can report on: • The number of workers in your organization who use Workday Assistant. • The capabilities your workers request most frequently. • The platforms on which workers access Assistant. Examples: web browser, mobile, or Workday for Microsoft Teams.
Get Conversation Data report	Enables you to download all Assistant and Worksheets conversation data in your tenant.
Purge Conversation Message Data report	Enables you to permanently delete conversation data for a specific message.

You can use the Assistant Usage Reports report data source to create custom visualizations.

Integrations

No impact.

Connections and Touchpoints

Touchpoints can vary by worker depending on security permissions and your selections on the Edit Tenant Setup - Assistant task.

Workday Assistant interacts with these functional areas in Workday:

Features	Considerations
Benefits	Workers can view details about their insurance and benefits.
Case Management	Workers can open Help cases.
Expenses	Workers can view their expense reports.
Feedback	Workers can give and request feedback. Managers can access feedback for their team.
Goals	Workers can view and manage their goals. Managers can view and manage goals for their team.
Knowledge Management	When workers enter keywords that Workday associates with knowledge articles, workers can read the articles in pop ups.
Learning	Workers can: • Browse courses. • Enroll in courses. • View Learning Home. • View enrolled, required, and completed courses. • View transcripts. Managers can view Learning reports for their team.
Pay	Workers can access compensation information and tax documents.
Performance	Workers can view and manage their performance reviews. Managers can access reviews for their team.
Procurement	Workers can view purchase requisition statuses and related supplier invoice details.
Productivity	Workers can access Drive.
Projects	Workers can view their projects, including statuses and related information.
Recruiting	Workers can: • Refer candidates. • Search jobs. Managers can: • Start new job requisitions. • View candidate statuses. • View in-progress job requisitions.

Features	Considerations
Staffing	Managers can access the *Change Job* business process and Change Job templates.
Team Management	Managers can view details about their teams such as birthdays, work anniversaries, and upcoming time off.
Time Off	Workers can: • Correct time off requests • Request time off • View holiday schedules • View time off balances
Time Tracking	Workers can enter and submit time worked.
Workday for Microsoft Teams	Workers can access Workday Assistant capabilities from their Microsoft Teams workspace.
Workday for Slack	Workers can access Workday Assistant capabilities from their Slack workspace.
Worker Data	Workers can search worker profiles and access or change their personal information, such as employee ID, hire date, and work location.

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: Time Off in Workday Assistant on page 2325

Concept: Time Tracking in Workday Assistant on page 2670

Tasks

Steps: Set Up Workday Assistant for Staffing on page 524

Reference

Reference: Edit Tenant Setup - Assistant

2024R2 Feature Release Note: Workday Assistant Moving to Search

2024R2 Feature Release Note: AI Enhanced Search

2021R2 What's New Post: Workday Assistant for Projects

Steps: Set Up Workday Assistant

Prerequisites

Review setup considerations for Workday Assistant.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.

3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

Workday Assistant is a conversational search tool designed to help casual Workday users discover information, complete common tasks, and get support.

Examples: Workers can enter phrases like these into Workday Assistant:

- Change my marital status.
- How much vacation time do I have?
- Request time off.
- What is my hire date?

Workers can view all of the capabilities available to them in Workday Assistant by entering *What can you do?* or *Show available capabilities*.

Workday Assistant responds to requests in one of 2 ways:

- Quick Actions: Workers can complete some tasks directly in the Workday Assistant chat window. Example: When you use Workday Assistant to request time off, it prompts you to enter the request date(s) and type and submits the request without requiring you to access the Request Time Off report.
- Navigation: Workday Assistant links workers to the task or report they're looking for in Workday. Example: When you use Workday Assistant to access your feedback, it provides a link to the View Feedback Received report.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.

   On the Innovation Services Opt-In task, select the Workday Assistant service on the Available Services tab in the People Experience category.

2. Edit Domain Security Policies.

   To give workers access to Workday Assistant, create or edit security policies for these domains in the System functional area:

   - *Assistant*
   - *Bots*
   - *Manage Bot and User Conversations*
   - *Set Up: Tenant Setup - Assistant*
   - (Optional) *Assistant Usage Reports*

   Assign security groups Get, Put, View, and Modify permissions on both the *Assistant* and *Bots* domains.

   Note: To protect user data, Workday recommends that you restrict *Manage Bot and User Conversations* domain access to a small subset of administrators. Admins assigned to this domain can access the:

   - Get Conversation Data report. This enables you to download data for all Assistant and Worksheets conversation messages in your tenant.
   - Purge Bot Conversation Data task. This enables you to permanently delete all conversation message data in your tenant.
   - Purge Conversation Message Data report. This enables you to permanently delete data associated with a specific message.
3. Activate Pending Security Policy Changes.
4. Access the Edit Tenant Setup - Assistant task.

   Configure the actions you want users to perform in Workday Assistant.

   See Reference: Edit Tenant Setup - Assistant.

   Security: *Set Up: Tenant Setup - Assistant* domain in the System functional area.

Next Steps

From the Delivered Discovery Boards report, access the Assistant Usage Reports discovery board to view data visualizations of how your users interact with Workday Assistant.

Related Information

Concepts

Setup Considerations: Workday Assistant on page 2974

Tasks

Copy Workday-Delivered Discovery Boards

Download All Comment Data

Reference

Workday Assistant Factsheet

Steps: Set Up Workday Assistant for Staffing

Prerequisites

Review setup considerations for Workday Assistant and Workday Staffing.

Configure these domain security policies in the Staffing functional area:

- *Staffing Actions*
- *Staffing Organizations* (for consolidated templates)
- *Worker Data: Collective Agreements*

Configure these domain security policies in the Advanced Compensation functional area for consolidated templates:

- *Add Compensation Management Plans*
- *Change Compensation Management Plans*

Context

You can use Workday Assistant to:

- Access the Start Job Change task.
- Initiate *Change Job* business process transactions using Change Job templates.

Steps

1. Set up Workday Assistant.

   Steps: Set Up Workday Assistant.
2. Access the Edit Tenant Setup - Assistant task.

   In the Staffing section, enable 1 of these options:

   - Enable Change Job Templates
   - Enable Change Job

   Security: *Set Up: Tenant Setup - Assistant* domain in the System functional area.
3. Access the Maintain Change Job Templates task.

   In the Enable For Initiating Action column, add Workday Assistant / REST API.

   Security: *Set Up: Staffing* domain in the Staffing functional area.

Related Information

Concepts

Setup Considerations: Staffing on page 513
Setup Considerations: Workday Assistant on page 2974

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 the *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.

You can enable workers to correct time off by adding the relevant security group to the initiating action for the Correct Time Off Entry (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 2974

Tasks

Steps: Set Up Time Off Plans on page 2276

Reference

Reference: Edit Tenant Setup - Assistant

Reference: Edit Tenant Setup - Assistant

Concept: Time Tracking 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.

Using Workday Assistant for Time Tracking Tasks

Workers can use Workday Assistant to quickly access time entry tasks, reducing the number of clicks required to navigate to frequently used tasks. Example: When workers enter a phrase such as "enter my time" in Workday search, Assistant provides a link to the time entry calendar where the worker can enter time blocks.

Workday Assistant doesn't support:

- Entering time on mobile devices.
- Entering time for days in the past or future.
- High-volume time entry.
- Time approval.

To configure Workday Assistant for Time Tracking, you must be a member of a security group on these domains:

- *Manage Bot and User Conversations* in the System functional area.
- *Set Up: Edit Tenant Setup - Assistant* in the System functional area.
- *Set Up: Time Tracking* in the Time Tracking functional area.

You can enable workers to enter time using Workday Assistant by adding relevant workers to these security domains and business process security policies:

Functional Area or Business Process	Security Domain or Action	Notes
System Functional Area	• *Assistant* • *Bots*	Add workers to these domains so they can access Workday Assistant.
Time Tracking Functional Area	For check in and check out workers: • *Self Service: Time Clock*	Add workers to these domains so they can enter time. Workday Assistant navigates workers to

Functional Area or Business Process	Security Domain or Action	Notes
	• *Process: Time Block REST APIs* • *Process: Time Clock Event REST APIs* For workers who enter time on the calendar: • *Self Service: Time Calendar* • *Process: Time Block REST APIs* • *Process: Time Clock Event REST APIs*	the time entry calendar when they need to enter time blocks.
Enter Time Business Process	Ensure workers can access these initiating actions: • *Time Block Micro Edit* • *Submit Time* • *Submit Time (REST Service)*	Configure the business process security policy so workers can enter and submit time using Workday Assistant.

Related Information

Tasks

Steps: Set Up Time Entry on page 2655

Reference

Reference: Edit Tenant Setup - Assistant

Examples

The Next Level: Innovation Services for Time Tracking

Reference: Workday Assistant and Workday Everywhere Capabilities

This topic lists capabilities that are supported by:

- Workday Assistant.
- Workday Everywhere:
    - Workday for Microsoft Teams.
    - Workday for Slack.

Workday supports capabilities in these ways:

- Guides: Direct links to Workday tasks or reports. Example: A worker wants to enroll in a Learning course, so they type "learning" into Workday Assistant and click the link Workday provides to the Browse Learning report.
- Notifications: Actionable notifications delivered via Slack or Microsoft Teams. Example: A worker submits a time off request, and Workday delivers a Microsoft Teams notification to their manager that displays the request details and an Approve button the manager can use to approve the request directly from the notification.
- Quick actions: Self-service tasks that you can complete within Workday Assistant or Workday Everywhere. Example: Workers can give anytime feedback without leaving Slack using theGive Anytime Feedback pop up in their Workday for Slack My Quick Actions menu.

Capability categories:

- Benefits on page 2985
- Career on page 2985

Benefits

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view their: • Dependents. • Insurance policies.	*Self-Service: Benefit Elections*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Career

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can access the Find Jobs report.	*Internal Careers*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Expenses

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack

Workers can enter expenses.	*Self-Service: Expense Report*	None	Quick action	Quick action
Workers can view their expense reports.	*Self-Service: Expense Report*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Feedback

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view their received and requested feedback.	• *Self-Service: Anytime Feedback* • *Self-Service: Feedback* • *Self-Service: Role Requested Feedback*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can give anytime feedback.	*Self-Service: Expense Report*	Quick action	Quick action	Quick action
Managers can view received and requested feedback for their workers.	• *Worker Data: Anytime Feedback* • *Worker Data: Role Requested Feedback*	Guide	• Notification • Guide	• Notification • Guide

Goals

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view goals for themselves and their organizations.	*Self-Service: Employee Goals*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can view and manage goals for their	*Worker Data: Employee Goals*	Guide	Guide	Guide

workers and organizations.			You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Human Resources

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view your organization's COVID-19 notice.	• *Self-Service: Anytime Feedback* • *Self-Service: Feedback* • *Self-Service: Role Requested Feedback*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can look up coworker information such as email, location, and manager.	*Worker Data: Public Worker*	Quick action	Quick action	Quick action
Workers can request reference letters.	*Request Reference Letter* business process	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Learning

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can: • Access the Browse Learning report to view and enroll in content. • View Learning Home.	*Learning Access*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

• View their transcripts.				
Workers can: • View and access their Continue Learning dashboard. • View and access a list of their Required Learning.	*Learning Access*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can view Learning reports for their team.	*Learning Access*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can receive notifications when they have new learning enrollments to approve for their team.	*Learning Access*	None	Notification	Notification

Miscellaneous

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can access My Tasks and view how many tasks they have awaiting action.	None	None	None	Guide

Pay

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view their previous and next pay dates.	*Self-Service: Payroll (My Payslips)*	None	Quick action You must enable this capability for Workday Assistant before you can use	Quick action You must enable this capability for Workday Assistant before you can use

			it in Workday Everywhere.	it in Workday Everywhere.
Workers can access compensation information and tax documents.	• *Self-Service: Payroll (My Payment Elections)* • *Self-Service: Payroll (My Tax Documents)*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Performance Reviews

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view and access their performance reviews.	*Self-Service: Employee Reviews*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can view and start performance reviews for their team.	*Worker Data: Performance Reviews*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Procurement

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view purchase requisition statuses and related supplier invoice details.	*Self-Service: Requisition*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Productivity

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack

Workers can access Drive.	*Drive*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Profile

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view their personal information, including their: • Title. • Hire date. • Manager. • Emergency contacts. • Marital status. • Email. • Preferred name. • Sexual and gender identity.	*Self-Service: Current Staffing Information*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can change their personal information.	*Self-Service: Current Staffing Information*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Projects

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can access the Find Projects report to view their projects, including statuses and related	*Manage: Project Details*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use	Quick action You must enable this capability for Workday Assistant before you can use

information. (Find Projects report?)			it in Workday Everywhere.	it in Workday Everywhere.

Recruiting

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can refer candidates.	*Employee Referrals*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can view in-progress job requisitions.	*Job Requisition Data*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can: • Start new job requisitions. • View candidate statuses.	*Job Requisition Data*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can send messages to workers requesting interview feedback.	None	Quick action	Quick action	Quick action

Staffing

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Managers can access the *Change Job* business process and use Change Job templates to initiate job	*Set Up: Staffing*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

changes for their workers.				

Team Management

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Managers can view information for their workers, such as: • Anniversaries. • Birthdays. • Time in position. • Hire dates. • Promotion dates.	• *Worker Data: Anniversaries/ Birthday Reports* • *Worker Data: Public Worker Reports*	None	Quick action	Quick action

Time Off

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can: • Request time off. • Correct time off. • View holiday schedules. • View time off balances.	• *Self-Service: Time Off* domain • *Correct Time Off* business process	Quick action	Quick action	Quick action
Managers can view and approve time off for their workers. Workday Everywhere only supports approval notifications for business process approval steps.	*Worker Data: Time Off (Time Off Manager View)*	None	• Notification • Quick action	• Notification • Quick action
Managers can receive notifications when they have new time off requests	*Worker Data: Time Off (Time Off Manager View)*	None	Quick action	Quick action

to approve for their workers.				
Workers can receive notifications when their time off requests are approved.	*Self-Service: Time Off*	None	• Notification • Quick action	• Notification • Quick action

Time Tracking

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can enter time worked.	*Worker Data: Time Tracking High Volume Enter Time*	Quick action	Quick action	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can submit time worked.	*Worker Data: Time Tracking High Volume Enter Time*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can check in and out.	*Self-Service: Time Clock*	None	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can approve time for their workers.	*Manager: Time Tracking Manager Edit and Approve*	None	Guide	Guide

Workday Help

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can open Help cases.	*Set Up: Help Case Management*	Guide	Guide You must enable this capability for Workday Assistant before	Guide You must enable this capability for Workday Assistant before

			you can use it in Workday Everywhere.	you can use it in Workday Everywhere.
Workers can receive notifications when someone replies to their open Help cases.	*Set Up: Help Case Management*	None	Notification + Quick action	Notification + Quick action
When workers enter keywords that Workday associates with knowledge articles, workers can read the articles in pop ups.	*Help Article Access*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
You can configure a Custom Help Contact message to direct workers when they can't find what they need.	*Manager: Time Tracking Manager Edit and Approve*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Related Information

Concepts

Setup Considerations: Workday Assistant on page 2974

Reference

The Next Level: Workday Everywhere Next Level Webinar Series

Workday Community: How to Deploy Workday for Microsoft Teams

Workday Community: How to Deploy Workday for Slack

Workday Community: Workday Everywhere User Group

Workday Community: Workday for Slack and Microsoft Teams FAQ

Workday Community:Workday for Microsoft Teams and Slack Product Capabilities

Reference: Workday Everywhere Notifications on page 3011

Reference: Edit Tenant Setup - Assistant

Troubleshooting: Workday Assistant

Assistant is stuck in a conversational loop.

Solution: Enter *Reset* to begin a new conversation with Assistant.

Assistant isn't visible or responsive.

When workers attempt to interact with Workday Assistant, it fails to:

- Display the Assistant icon.
- Navigate to Workday tasks.
- Open a chat window.

- Submit transactions.

Cause: Workers aren't included in Assistant's security groups.

Solution:

Steps

1. Edit Domain Security Policies.

   Access these domains:

   - *Assistant*
   - *Bots*

   Make sure both domains have:

   - Get, Put, View, and Modify security permissions.
   - The appropriate workers included in their security groups.
2. Activate Pending Security Policy Changes.

Related Information
Reference
Reference: Edit Tenant Setup - Assistant

Workday Everywhere

Steps: Set Up Security for Workday Everywhere

Prerequisites

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

Set up security to enable workers to perform some Workday self-service tasks directly in these workspaces:

- Microsoft Teams
- Slack

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.

   On the Innovation Services Opt-In task, select the Workday Everywhere service on the Available Services tab in the People Experience category.
2. Access the Maintain Functional Areas task.

   Enable the Workday Everywhere functional area.

   Security: *Security Configuration* domain in the System functional area.
3. Access the Domain Security Policies for Functional Area report.

   Enable these domain security policies in the System functional area:

   - *View: Public Innovation Services Items*. Secures worker data by checking the Innovation Services Agreement before granting user access.
   - *WQL for Workday Extend*. Enables you to integrate with your Slack or Microsoft Teams workspace.

   Security: *Security Activation* domain in the System functional area.
4. Edit Domain Security Policies.

   Add administrators who will install and manage Workday for Microsoft Teams and Workday for Slack to the *Workday Everywhere Administrator* domain in the Workday Everywhere functional area.

   After testing, add *All Employees* as a security group with:

   - View and Get access to these domains in the System functional area:
     - *View: Public Innovation Services Items*
     - *WQL for Workday Extend*
   - View and Modify access to the *Workday Everywhere User* domain in the Workday Everywhere functional area, which permits workers to use Workday in their Slack or Microsoft Teams workspace. Workday recommends that you:
     - Add *Employee As Self* as a security group to this domain.
     - Test Workday for Microsoft Teams and Workday for Slack with select security groups before adding *All Employees* to this domain. Workday recommends testing with a team of managers and their direct reports. See Workday for Slack and Workday for Microsoft Teams FAQ.

   (Optional) Add these security groups with View and Modify access to the *Workday Everywhere User* domain to enable contingent workers to use Workday Everywhere:

   - *All Contingent Workers*
   - *Contingent Worker as Self*

   Note: Feature availability for contingent workers depends on your tenant configurations.

   (Optional) Add managers as a security group with View and Modify access to these domains in the Time Off and Leave functional area:

   - *Worker Data: Time Off (Time Off Balances Manager View)*. Permits managers to receive Slack or Microsoft Teams notifications that enable them to approve time off requests for their workers.
   - *Worker Data: Time Off (Time Off Manager View)*.

Next Steps

- Activate Pending Security Policy Changes.
- Steps: Set Up Workday Everywhere on page 2997.

Related Information

Concepts

Setup Considerations: Workday Assistant on page 2974

Workday Community: AI Fact Sheet for Workday Assistant

Reference

The Next Level: Workday Everywhere Next Level Webinar Series

Workday Community: How to Deploy Workday for Microsoft Teams

Workday Community: How to Deploy Workday for Slack

Workday Community: Workday Everywhere User Group

Workday Community: Workday for Slack and Microsoft Teams FAQ

Workday Community:Workday for Microsoft Teams and Slack Product Capabilities

Reference: Workday Everywhere Notifications on page 3011

Reference: Edit Tenant Setup - Assistant

Steps: Set Up Workday Everywhere

Context

You can enable workers and managers to perform self-service Workday tasks directly from these workspaces:

- Microsoft Teams
- Slack

Workday Everywhere is designed to help casual Workday users discover information, complete common tasks, and get support without opening Workday in a web browser. Examples: Workers can enter phrases like these into Workday for Microsoft Teams or Workday for Slack:

- Change my marital status.
- How much vacation time do I have?
- Request time off.
- What is my hire date.

Workers can view the capabilities available to them in Workday Everywhere by clicking Explore all under My Quick Actions.

You can also enable workers and managers to receive notifications in Workday for Microsoft Teams and Workday for Slack. Example: You can configure Workday Everywhere to notify managers when their workers request time off, and to notify workers when their time off requests are approved or denied.

Steps

1. Set up security for your workspace.

   See Steps: Set Up Security for Workday Everywhere on page 2995.
2. (Optional) In your Microsoft Teams workspace, install Workday as a third-party app and add it to a permission policy assigned to your users. You must be a Microsoft Office 365 Global Administrator to manage app permission policies.

   Workday prompts you to enable these Microsoft Graph API permissions:

   - Allow the app to manage itself for all users.
   - Read all users' full profiles.
   - Sign in and read user profile.

   See Global App Permissions and Considerations.

3. (Optional) In your Slack workspace, install Workday as a third-party app and connect it to your Slack account when prompted. You must be a Slack Workspace Owner to install the Workday app.

   See Add Apps to Your Slack Workspace.
4. Navigate to the Workday app in your Slack workspace and enter *hi* into the Messages tab.
5. Click Connect to Workday and enter your Workday tenant alias when prompted.

   Tenant aliases use the naming convention for the environment of the tenant:

   - Production: tenantname
   - Sandbox: tenantname-sb

   Note: If you rename your tenant, you must disconnect and reconnect the Workday app in your workspace using your new tenant alias.
6. (Optional) To configure settings and capabilities for Workday for Slack or Workday for Microsoft Teams, navigate to the Admin Dashboard on the Home tab and click Configure. Workday automatically enables all features for all users.

   As you configure capabilities for your workspace, consider:

Option	Description
Give interview feedback	To enable workers to give interview feedback, configure the *Interview* business process with these action steps: *Schedule Interview* > *Manage Interview Feedback* > *Make Interview Decision*.
Look up a coworker	To enable coworker lookup, enable the *WQL for Workday Extend* domain in the System functional area and add All Employees as a security group with View permissions.

7. (Optional) Workday recommends that you set up Workday Assistant to enable these and many other capabilities:

   - Change job details
   - Request time off and view time off balance
   - View and update personal information

   See Steps: Set Up Workday Assistant on page 2979.
8. (Optional) Access the Set Up Notifications for Workday Everywhere task.

   On the Business Process Notifications tab, select 1 or more business process definitions for which you want to enable notifications.

   On the Workday Everywhere Notifications tab, select check boxes for notification types you want to enable.

   Security: *Workday Everywhere Administrator* domain in the Workday Everywhere functional area.
9. (Optional) Use App Setup Policies to Pin and Auto-Install Apps in Teams.

   To help workers find Workday for Microsoft Teams, use a setup policy to pin the Workday app. You must be a Microsoft Office365 Teams Administrator to manage pinned apps.

Related Information

Concepts

Setup Considerations: Workday Assistant on page 2974

Reference

The Next Level: Workday Everywhere Next Level Webinar Series

Workday Community: How to Deploy Workday for Microsoft Teams

Workday Community: How to Deploy Workday for Slack

Workday Community: Workday Everywhere User Group

Workday Community: Workday for Slack and Microsoft Teams FAQ
Workday Community:Workday for Microsoft Teams and Slack Product Capabilities
Reference: Workday Everywhere Notifications on page 3011
Reference: Edit Tenant Setup - Assistant

Steps: Set Up Time Off Notifications for Workday Everywhere

Context
You can make it easier for workers and managers to manage time off by configuring actionable time off request and time off correction notifications to deliver to their Slack and Microsoft Teams workspaces.

Workday Everywhere only supports approval notifications for business process approval steps, not review steps.

Prerequisites

- Configure the *Request Time Off* and *Correct Time Off* business processes. See Steps: Set Up Time Off Plans.
- Set up Workday Everywhere.
- Security: *Workday Everywhere Administrator* domain in the Workday Everywhere functional area.

Steps

1. Add 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 REST service for whichever business process you use to enable workers to request time off.
2. Access the Set Up Notifications for Workday Everywhere task.
    a) (Optional) To enable time off correction notifications, access the Business Process Notifications tab and add the *Correct Time Off* business process.
    b) (Optional) To enable time off request notifications, access the Workday Everywhere Notifications tab and select the Active check box for the Time Off Request notification definition.
3. (Optional) Make sure users connect to Workday for Microsoft Teams or Workday for Slack.

    Workday Everywhere:

    - Can deliver time off request notifications to unconnected users, but the notifications aren't actionable and don't contain specific information until users connect.
    - Can’t deliver time off correction notifications until users connect.

Related Information
Concepts
Setup Considerations: Workday Assistant on page 2974
Reference
The Next Level: Workday Everywhere Next Level Webinar Series
Workday Community: How to Deploy Workday for Microsoft Teams
Workday Community: How to Deploy Workday for Slack
Workday Community: Workday Everywhere User Group
Workday Community: Workday for Slack and Microsoft Teams FAQ
Workday Community:Workday for Microsoft Teams and Slack Product Capabilities

Reference: Workday Everywhere Notifications on page 3011
Reference: Edit Tenant Setup - Assistant

Concept: Workday Everywhere

You can enable your workers to perform self-service Workday tasks directly from their Slack or Microsoft Teams workspaces without opening Workday in a web browser. Workers can view the capabilities available to them in Workday for Microsoft Teams and Workday for Slack by clicking Explore all under My Quick Actions.

Workday recommends that you enable Workday Assistant. When you enable Workday Assistant capabilities on the Edit Tenant Setup - Assistant task, you also enable most Assistant capabilities in your Slack and Microsoft Teams workspaces.

You can use Workday for Microsoft Teams and Workday for Slack in these languages:

- English
- French (Canada)
- French (continental)
- German
- Japanese
- Korean
- Spanish

Workday Everywhere defaults to English unless workers select their preferred language in Slack or Microsoft Teams. Example: When a user selects French as their preferred language in Workday but doesn't select a preferred language in Microsoft Teams, we send them a Teams welcome message in English.

Workday delivers new capabilities in English, and provides translations for those capabilities as soon as possible. Workers who select a non-English preferred language might not be able to access some capabilities immediately.

Security

You can access actions and information in your workspace that you'd have access to in Workday. Example: Managers can use Workday Everywhere to access performance reviews for their team, while workers can only access their own reviews.

You can only connect:

- A production instance of Microsoft Teams or Slack to your Workday tenant.
- Slack or Microsoft Teams to your tenant if you're a worker. Contingent workers can use Workday Everywhere if you give them access, but they can't set it up for their organization.

If the person who installs Workday for Microsoft Teams or Workday for Slack leaves your organization, someone else must have access to the *Manage: Innovation Services* security domain to maintain feature and user permissions.

Capabilities

Workday recommends that you also set up Workday Assistant to enable most Assistant capabilities in your Slack and Microsoft Teams workspaces. For a full list of Assistant capabilities, see Reference: Edit Tenant Setup - Assistant. Workday might take up to 24 hours to apply changes on the Edit Tenant Setup - Assistant task to Workday for Microsoft Teams and Workday for Slack.

When you don't set up Workday Assistant, workers can still access these capabilities in their Slack and Microsoft Teams workspaces:

- Access their My Tasks.
- Enter expenses.

- Give feedback.
- Look up coworkers.
- Request interview feedback.
- View their payslip information.

Workday for Microsoft Teams and Workday for Slack don't support Custom Help Contact, even when you configure it in Workday Assistant.

For more information, see Workday for Microsoft Teams and Slack Product Capabilities.

Notifications
Workday occasionally delivers ad hoc Microsoft Teams or Slack notifications to highlight capabilities and help workers connect. We also notify Workday Everywhere administrators when we release new or updated features.

You can configure the Set Up Notifications for Workday Everywhere task to enable Workday to deliver specific notifications to workers' Slack and Microsoft Teams workspaces for:

- Anytime feedback: Notify everyone the feedback is shared with when workers receive feedback. Example: the recipient and their manager, unless the feedback is confidential or private.
- Case Management: Notify workers when someone replies to their open Help cases.
- Learning: Notify managers to approve new Learning enrollments for their workers.
- Time off: Notify managers to approve new or corrected time off requests for their workers.

Related Information

Concepts

Setup Considerations: Workday Assistant on page 2974

Reference

The Next Level: Workday Everywhere Next Level Webinar Series

Workday Community: How to Deploy Workday for Microsoft Teams

Workday Community: How to Deploy Workday for Slack

Workday Community: Workday Everywhere User Group

Workday Community: Workday for Slack and Microsoft Teams FAQ

Workday Community:Workday for Microsoft Teams and Slack Product Capabilities

Reference: Workday Everywhere Notifications on page 3011

Reference: Edit Tenant Setup - Assistant

Reference: Workday Assistant and Workday Everywhere Capabilities

This topic lists capabilities that are supported by:

- Workday Assistant.
- Workday Everywhere:
  - Workday for Microsoft Teams.
  - Workday for Slack.

Workday supports capabilities in these ways:

- Guides: Direct links to Workday tasks or reports. Example: A worker wants to enroll in a Learning course, so they type "learning" into Workday Assistant and click the link Workday provides to the Browse Learning report.
- Notifications: Actionable notifications delivered via Slack or Microsoft Teams. Example: A worker submits a time off request, and Workday delivers a Microsoft Teams notification to their manager that displays the request details and an Approve button the manager can use to approve the request directly from the notification.

- Quick actions: Self-service tasks that you can complete within Workday Assistant or Workday Everywhere. Example: Workers can give anytime feedback without leaving Slack using theGive Anytime Feedback pop up in their Workday for Slack My Quick Actions menu.

Capability categories:

Benefits

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view their: • Dependents. • Insurance policies.	*Self-Service: Benefit Elections*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Career

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can access the Find Jobs report.	*Internal Careers*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Expenses

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can enter expenses.	*Self-Service: Expense Report*	None	Quick action	Quick action
Workers can view their expense reports.	*Self-Service: Expense Report*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Feedback

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view their received and requested feedback.	• *Self-Service: Anytime Feedback* • *Self-Service: Feedback* • *Self-Service: Role Requested Feedback*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can give anytime feedback.	*Self-Service: Expense Report*	Quick action	Quick action	Quick action
Managers can view received and requested feedback for their workers.	• *Worker Data: Anytime Feedback* • *Worker Data: Role Requested Feedback*	Guide	• Notification • Guide	• Notification • Guide

Goals

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view goals for themselves and their organizations.	*Self-Service: Employee Goals*	Guide	Guide You must enable this capability for Workday Assistant before you can use	Guide You must enable this capability for Workday Assistant before you can use

			it in Workday Everywhere.	it in Workday Everywhere.
Managers can view and manage goals for their workers and organizations.	*Worker Data: Employee Goals*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Human Resources

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view your organization's COVID-19 notice.	• *Self-Service: Anytime Feedback* • *Self-Service: Feedback* • *Self-Service: Role Requested Feedback*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can look up coworker information such as email, location, and manager.	*Worker Data: Public Worker*	Quick action	Quick action	Quick action
Workers can request reference letters.	*Request Reference Letter* business process	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Learning

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can: • Access the Browse Learning report to view and enroll in content.	*Learning Access*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

• View Learning Home. • View their transcripts.				
Workers can: • View and access their Continue Learning dashboard. • View and access a list of their Required Learning.	*Learning Access*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can view Learning reports for their team.	*Learning Access*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can receive notifications when they have new learning enrollments to approve for their team.	*Learning Access*	None	Notification	Notification

Miscellaneous

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can access My Tasks and view how many tasks they have awaiting action.	None	None	None	Guide

Pay

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view their previous and next pay dates.	*Self-Service: Payroll (My Payslips)*	None	Quick action	Quick action

			You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can access compensation information and tax documents.	• *Self-Service: Payroll (My Payment Elections)* • *Self-Service: Payroll (My Tax Documents)*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Performance Reviews

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view and access their performance reviews.	*Self-Service: Employee Reviews*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can view and start performance reviews for their team.	*Worker Data: Performance Reviews*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Procurement

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view purchase requisition statuses and related supplier invoice details.	*Self-Service: Requisition*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Productivity

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can access Drive.	*Drive*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Profile

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can view their personal information, including their: • Title. • Hire date. • Manager. • Emergency contacts. • Marital status. • Email. • Preferred name. • Sexual and gender identity.	*Self-Service: Current Staffing Information*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can change their personal information.	*Self-Service: Current Staffing Information*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Projects

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can access the Find Projects	*Manage: Project Details*	Quick action	Quick action You must enable this capability	Quick action You must enable this capability

report to view their projects, including statuses and related information. (Find Projects report?)			for Workday Assistant before you can use it in Workday Everywhere.	for Workday Assistant before you can use it in Workday Everywhere.

Recruiting

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can refer candidates.	*Employee Referrals*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can view in-progress job requisitions.	*Job Requisition Data*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can: • Start new job requisitions. • View candidate statuses.	*Job Requisition Data*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can send messages to workers requesting interview feedback.	None	Quick action	Quick action	Quick action

Staffing

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Managers can access the *Change Job* business process and use Change	*Set Up: Staffing*	Guide	Guide You must enable this capability for Workday	Guide You must enable this capability for Workday

Job templates to initiate job changes for their workers.			Assistant before you can use it in Workday Everywhere.	Assistant before you can use it in Workday Everywhere.

Team Management

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Managers can view information for their workers, such as: • Anniversaries. • Birthdays. • Time in position. • Hire dates. • Promotion dates.	• *Worker Data: Anniversaries/ Birthday Reports* • *Worker Data: Public Worker Reports*	None	Quick action	Quick action

Time Off

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can: • Request time off. • Correct time off. • View holiday schedules. • View time off balances.	• *Self-Service: Time Off* domain • *Correct Time Off* business process	Quick action	Quick action	Quick action
Managers can view and approve time off for their workers. Workday Everywhere only supports approval notifications for business process approval steps.	*Worker Data: Time Off (Time Off Manager View)*	None	• Notification • Quick action	• Notification • Quick action
Managers can receive notifications when they have new	*Worker Data: Time Off (Time Off Manager View)*	None	Quick action	Quick action

time off requests to approve for their workers.				
Workers can receive notifications when their time off requests are approved.	*Self-Service: Time Off*	None	• Notification • Quick action	• Notification • Quick action

Time Tracking

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can enter time worked.	*Worker Data: Time Tracking High Volume Enter Time*	Quick action	Quick action	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can submit time worked.	*Worker Data: Time Tracking High Volume Enter Time*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Workers can check in and out.	*Self-Service: Time Clock*	None	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
Managers can approve time for their workers.	*Manager: Time Tracking Manager Edit and Approve*	None	Guide	Guide

Workday Help

Capabilities	Security	Workday Assistant	Workday for Microsoft Teams	Workday for Slack
Workers can open Help cases.	*Set Up: Help Case Management*	Guide	Guide You must enable this capability for Workday	Guide You must enable this capability for Workday

			Assistant before you can use it in Workday Everywhere.	Assistant before you can use it in Workday Everywhere.
Workers can receive notifications when someone replies to their open Help cases.	*Set Up: Help Case Management*	None	Notification + Quick action	Notification + Quick action
When workers enter keywords that Workday associates with knowledge articles, workers can read the articles in pop ups.	*Help Article Access*	Quick action	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Quick action You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.
You can configure a Custom Help Contact message to direct workers when they can't find what they need.	*Manager: Time Tracking Manager Edit and Approve*	Guide	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.	Guide You must enable this capability for Workday Assistant before you can use it in Workday Everywhere.

Related Information

Concepts

Setup Considerations: Workday Assistant on page 2974

Reference

The Next Level: Workday Everywhere Next Level Webinar Series

Workday Community: How to Deploy Workday for Microsoft Teams

Workday Community: How to Deploy Workday for Slack

Workday Community: Workday Everywhere User Group

Workday Community: Workday for Slack and Microsoft Teams FAQ

Workday Community:Workday for Microsoft Teams and Slack Product Capabilities

Reference: Workday Everywhere Notifications on page 3011

Reference: Edit Tenant Setup - Assistant

Reference: Workday Everywhere Notifications

You can configure the Set Up Notifications for Workday Everywhere task to enable Workday Everywhere to deliver Slack or Microsoft Teams notifications to workers.

To get the most out of notifications, Workday recommends that every worker connects to Workday for Slack or Workday for Microsoft Teams. Workday Everywhere still delivers notifications to unconnected workers, but the notifications:

- Aren't actionable.
- Don't contain any specific information.
- Only include an option to connect to Workday.

Workday Everywhere supports these notification types:

Notifications	Description
Anytime feedback	You can configure Workday Everywhere to deliver notifications when someone receives anytime feedback. Notifications include: • A link to view the feedback in Workday. • The feedback, badge, recipient’s name, and giver’s name unless the feedback was given anonymously. We deliver anytime feedback notifications to everyone the feedback is shared with. Example: Unless the feedback is private, we notify the recipient and their manager. Workday automatically enables anytime feedback notifications. You can disable them by accessing the Set Up Notifications for Workday Everywhere task and clearing the Active check box for Anytime Feedback on the Workday Everywhere Notifications tab.
Case management	You can configure Workday Everywhere to notify workers when someone replies to their open Help cases. Notifications include: • A link to view the Help case in Workday. • The Help case number. • The reply comment and commenter's name. You can set up case management notifications on the Set Up Notifications for Workday Everywhere task by accessing the Other Notifications tab and adding the Help functional area with Case Reply as the Content Type.
Expenses	You can configure Workday Everywhere to notify workers when their expense reports are reviewed. Notifications include: • A link to view the expense report in Workday. • Comments from the reviewer, if applicable. • The expense report memo, if applicable. • The expense report number. • Whether the expense report is approved, denied, or sent back for revision. Workday enables expense report notifications by default. You can disable them by accessing the Set Up Notifications for Workday Everywhere task and clearing the Active check box for

Notifications	Description
	Expense Everywhere on the Workday Everywhere Notificationstab.
Learning	Workday Everywhere supports 2 types of notifications for Learning enrollments. When you set up Learning notifications, we deliver: 1. Enrollment notifications to managers. When a worker enrolls in a Learning course, we deliver a notification to their manager that includes: • A link to view the enrollment in Workday. • A link to view their team calendar. • Approve and Deny buttons that the manager can use to respond to the enrollment. • The course name, dates, cost, and location. 2. Approval notifications to workers. When their manager approves or denies the enrollment, we deliver a notification back to the worker that includes: • A link to view the course in Workday. • Whether their enrollment was approved or denied, including the reason for denial. You can set up Learning notifications on the Set Up Notifications for Workday Everywhere task by configuring the *Enroll in Content* business process on the Business Process Notifications tab.
Time off	Workday Everywhere supports 2 types of notifications for time off requests and time off corrections. When you set up time off notifications, we deliver: 1. Request notifications to managers. When a worker submits a time off request or correction, we deliver a notification to their manager that includes: • A link to view the request in Workday. • A link to view their team calendar. • Approve and Deny buttons that the manager can use to respond to the request. • The request dates and type. 2. Approval notifications to workers. When their manager approves or denies the

Notifications	Description
	request, we deliver a notification back to the worker that includes: • A link to view the request in Workday. • Whether their request was approved or denied, including the reason for denial. See Steps: Set Up Time Off Notifications for Workday Everywhere on page 2999 for setup details.

Related Information

Concepts

Setup Considerations: Workday Assistant on page 2974

Reference

The Next Level: Workday Everywhere Next Level Webinar Series

Workday Community: How to Deploy Workday for Microsoft Teams

Workday Community: How to Deploy Workday for Slack

Workday Community: Workday Everywhere User Group

Workday Community: Workday for Slack and Microsoft Teams FAQ

Workday Community:Workday for Microsoft Teams and Slack Product Capabilities

Reference: Workday Everywhere Notifications on page 3011

Reference: Edit Tenant Setup - Assistant

Workday Help

Concept: Workday Help

Workday Help includes the Case Management and Knowledge Management features.

Case Management enables employees to get help by creating cases in the Workday Help Center. Case solvers can triage, manage, and resolve cases in the Help Case Workspace. Knowledge Management enables you to create custom internal articles that employees can find and access using Workday Search on the home page.

Feature	Description
Case Management	Create and manage service teams to handle HR inquiries, eliminating the need to maintain a separate help ticket application. You can create: • Routing rules for case categories that send workers' cases to the correct service team. • Eligibility rules to specify which workers can create which types of cases. Members of a service team can assign the cases to themselves or to another appropriate case solver.
Knowledge Management	You can create custom articles that contain company-specific information and then display

Feature	Description
	those articles to target audiences through search functionality, such as Workday Assistant. Note: Service Center Representatives and Students can access and view articles in the Help Center, but cannot access or create cases.

Related Information

Concepts

Setup Considerations: Case Management on page 3015

Concept: Knowledge Management on page 3053

Tasks

Steps: Set Up Case Management on page 3021

Steps: Set Up Knowledge Management on page 3043

Case Management

Setup Considerations: Case Management

You can use this topic to help make decisions when planning your configuration and use of case 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

Case management is the collective name for those parts of Workday Help that enable the creation, tracking, and resolution of HR cases. Employees use self-service to create cases, check their statuses, and connect with the assigned case solvers. Case solvers use a dedicated Help Workspace to manage cases throughout their lifecycle and to communicate with their creators.

Business Benefits

Case management lowers the number of active cases. It enables case deflection by including self-service resources that employees can use before creating a case. These resources include links to articles and Workday tasks.

Case management also provides an interactive workspace where case solvers can collaborate and reply to employees on their queries to resolve cases. This increased workflow efficiency means they can resolve cases more quickly.

Use Cases

You can use case management to enable employees, case solvers, case collaborators, and managers to perform tasks specific to their business needs and assigned role.

Employees can:

- Access suggested resources before creating a case, such as articles and Workday tasks.
- Create cases about general HR queries, such as enrolling family members on their health plan.
- View and update cases they created.

Case solvers can:

- View, manage, and update cases.
- Create a case about an employee to investigate a salary overpayment, where the employee won't get notifications about the case created on their behalf.
- Collaborate and link cases with related information together.
- Manage their workflow by using case status, flags, and labels to filter their case lists.
- Add Workday links and other attachments to case replies, such as an article about gym reimbursements to help an employee create an expense report.

Collaborators can:

- Work with Help service teams on nonconfidential cases to speed up case resolution.
- Run reports to view the details and messages or notes associated with a case that a case solver shared with them.

HR Service Managers can optimize their reporting activities by running custom and standard reports in the Help Dashboard.

HR Administrators can:

- Configure worker access to the Help functional area and its domains.
- Configure case message templates.
- Configure case notifications, case sharing, and case replies.
- Configure case confidentiality levels, case types, service categories, and case solver visibility at the tenant level.
- Configure case satisfaction surveys to send to employees after a case solver closes their case.
- Configure worker access to the Help functional area and its domains.
- Create HR teams that deal with issues of specific types, such as a Sensitive Issues team to deal with disciplinary cases.

Questions to Consider

Questions	Considerations
How do you want your employees to create cases?	You can enable employees to create cases using these desktop or mobile applications: • Workday Help • Workday Assistant • Workday for Slack • Workday for Microsoft Teams You can also enable employees to create cases by email. You can configure a Service step in a business process to create cases for employees automatically.
How do you want to structure case management?	You can create service teams for specific areas. You can then configure routing rules that assign cases to the relevant team. Example: The benefits service team deals with cases related to health insurance. You can define which case types are confidential and route them to specific service teams.

Questions	Considerations
Do you want to commit to time limits for case resolution?	You can create SLA metrics by service team. You can also reassign cases to a service team with a different SLA metric. When you reassign cases, Workday doesn't restart the SLA calculation, which is based on the case creation time. You can also use SLA schedules to define when an SLA timer runs based on the operational hours of a service team. When you configure an SLA schedule for an SLA metric, Workday calculates the time remaining for the SLA based on that schedule.
Do you need to migrate cases from an existing HR system?	Implementers can bulk migrate cases from an existing HR system to Workday Help. Case management preserves existing notes and comments on migrated cases but doesn't preserve custom tags. Implementers can only migrate active cases into Workday.
Do you want to enable case owners to reopen closed cases?	By default, case owners can't reopen cases. You can enable a setting that enables case owners to reopen cases resolved for less than 7 days from the Help Center. With this setting enabled, case owners can't reopen cases resolved for more than 7 days. Workday treats cases resolved for more than 7 days as closed. External case owners still can't reopen cases with this setting enabled.

Recommendations

- Decide on your service delivery model before adopting Case Management to ensure a smooth transition.
- Perform an external services audit to establish which cases should go through Case Management and which cases should go to external third-party providers. Example: Define external links to route IT cases to your external service providers.
- Configure routing rules to ensure that cases with unassigned rules go to a default service team. You can use the Evaluate Case Routing task to test more complex rules and confirm they work as expected.
- Create eligibility rules and questionnaires before creating case types.
- Provide domain access for workers outside of the Help service team. They'll be able to add messages or internal notes to a case that a case solver shared with them.
- Consult your internal HR teams to identify which resources are the most useful in helping employees find an answer to their most common questions before creating a case.
- Configure case message templates that enable case solvers to reply quickly to cases with predefined messages. You can include text, report fields that dynamically populate data, articles or tasks, and file attachments in each template.
- Configure case suggestions to provide employees with the most useful self-serve options.
- Configure constrained security for case creation to streamline the users and organizations that managers can create cases for.

- Add custom text and a Knowledge article to the Create Case task. This provides additional instructions and context to employees when they create a new case.
- Create case validations that require case solvers to complete designated fields before resolving a case. Case validations ensure that case solvers enter the necessary information to resolve a case.
- Configure case satisfaction surveys to collect feedback from your employees. When configured, Workday automatically sends a case satisfaction survey after a case solver closes an employee's case. Employees can answer the survey in My Tasks and on the case view.

Requirements

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.

Limitations

- You can assign cases to only 1 case solver at a time.
- Service Center Representatives can't access case management.
- External case owners can't reopen cases resolved for more than 7 days.

Tenant Setup

You can use the Edit Tenant Setup - Help task to:

- Specify case IDs.
- Create the default message that displays on confidential case creation.
- Specify whether case notifications include potentially sensitive information.
- Enable or disable case visibility and sharing for case solvers.
- Enable a high level or more granular view of case types during case creation.
- Enable employees and external users who don't have access to Workday to create cases by email.
- Enable employees and external users who don't have access to Workday to communicate with case solvers by email.
- Enable case linking for case solvers.
- Enable external record linking.
- Enable case follow-up dates for case solvers.
- Specify a default external case contact for cases created by a business process.
- Specify additional text and a Help article to display on the Create Case task.
- Enable case owners to reopen cases resolved for less than 7 days from the Help Center.

You can use the Edit Tenant Setup - System task to configure your Workday Help mobile application. Example: Enable the importing or sharing of attachments with external sources.

Security

Domains	Considerations
Help Case Data *Help Case Messages* (Subdomain of the Help Case Data domain) *Help Case Internal Notes* (Subdomain of the Help Case Data domain)	Case solvers with access to this domain can view cases in the Help Workspace and in reports. They can also view and add case replies or internal notes in the workspace.
Manage: Case Create About	Case solvers can create cases about others without notifying them.
Manage: Case Create on Behalf Of	Case solvers can create cases on behalf of others.

Domains	Considerations
Process: Help Cases	Case solvers can: • Access the Help Case Workspace. • Access the Create Case - Advanced task. • Assign new cases to a service team and a specific case solver on the selected service team.
Help Case External Contacts (Subdomain of the *Process: Help Cases* domain.)	Case solvers can: • Create and edit external case contact records. • Create cases on behalf of external contacts. • Assign new cases to a service team and a specific case solver on the selected service team.
Reports: Help Case Management	Case solvers can view noncase-related Help reports.
Self-Service: Help Case Management	Employees can create and view their own cases.
Set Up: Help Case Management	Administrators can configure Help to fit your business needs.
View: Confidential Help Cases	Case solvers can view and process confidential Help cases.
Business Process Administration *Manage: Business Process Definitions*	Administrators can: • Set up a business process step to create cases. • Add a step of to the *Resolve Case* business process to send case satisfaction surveys.
Set Up: Custom Validations	Administrators can case validations that require case owners to complete specific fields before resolving a case.

Business Processes

Use the *Resolve Case* business process to define the case approval process.

Reporting

You can access the Workday Standard Reports report to view all reports for Case Management.

Reports	Considerations
Case History Case History by Person - Detailed Report	View all activity for a specific case.
Evaluate Help Case Management Configuration	Establish whether a worker can create cases or not.
Help SLA Passed vs Failed Help SLA Performance - Cases Opened Within The Last Month	Measure adherence to SLAs.

Reports	Considerations
View Case	View case details for a specific case.
View Cases for Worker	View all cases created by a specific employee.
View Case Type Eligibility Rule View Case Routing Rule	View the rules Workday uses to categorize and assign cases.
View My Cases	View case details for cases that you created.
View Open Cases By Category View Open Cases By Status and Service Team View Open Cases by Case Type	View open cases.
View Shared Case	View case details and messages or notes for cases that a case solver shared with you.
View SLA Schedule	View SLA schedule details for SLA schedules that you created.

Integrations

You can use the Create Case REST APIs in the Help Case REST service to enable your applications and integrations to access Help features and data in Workday.

Connections and Touchpoints

Case Management interacts with these features in Workday:

Features	Considerations
Workday Assistant	You must enable Workday Help case creation in the Edit Tenant Setup – Assistant task to access Help features through Workday Assistant.
Workday for Slack	We recommend that you enable case reply notifications for the Help functional area in the Set Up Notifications for Workday Everywhere task.
Workday for Microsoft Teams	We recommend that you enable case reply notifications for the Help functional area in the Set Up Notifications for Workday Everywhere task.

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: People Experience

Workday Help: Case Creation and Case Communication by Email

The Next Level: Request Framework vs. Case Management - Functionality Comparison

2024R1 What's New: Direct Case Assignment

2024R1 What's New: Dynamic Fields on Help Case Message Templates

Reference: Edit Tenant Setup - System

Reference: Edit Tenant Setup - Help

Reference: Edit Tenant Setup - Assistant

Steps: Set Up Case Management

Prerequisites

Set up People Experience.

Security: *Set Up: Help Case Management* domain in the Help functional area.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

Case management enables you to create rules for case categories that route workers' cases to the correct service team. You can also create eligibility rules to specify which workers can create which types of cases. Members of the service team can assign the cases to themselves or to another appropriate case solver.

Steps

1. Enable Innovation Services Feature and Machine Learning Data Contributions for MSA Customers.

   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.

   On the Innovation Services Opt-In task, select the Help service on the Available Services tab in the People Experience category.
2. Enable the Help functional area.

   See Steps: Enable Functional Areas and Security Policies.
3. Access the Manage Service Categories report.

   Create case categories and related case types to organize your cases. Example: Create a Benefits case category with Pensions, Health Insurance, and Gym Membership case types.

   As you complete the task consider:

Option	Description
Confidential	Select to route confidential cases only to teams that have confidentiality permission.

Option	Description
Is External Case Type	Select to specify an external redirection link for cases of that type.

4. (Optional) Access the Create Case Type Eligibility Rule task.

   Define eligibility rules for case creation. Example: Only full-time employees can create cases with the case type Employee Relations.
5. (Optional) ../../../../manage-workday/business-processes/questionnaires/tso1611016403011.dita.

   Create a questionnaire for the applicable case types.

   As you complete the task, consider:

Option	Description
Questionnaire Types	Select *Case*.
(Optional) Questionnaire Instructions	Enter text to alert users that some information might be personal or sensitive.
6. Access the Create Service Team task.

   Create service teams to organize case solvers.

   Select the Allow Confidential Cases check box to specify that a team can handle cases whose type is confidential.
7. ../../../../manage-workday/roles/dan1370796643079.dita.

   As you complete the task, consider:

Option	Description
Enabled for	Select Service Team.
Assigned/Reviewed by Security Groups	Select Security Administrator.
8. Access the View Service Team report.

   From the related actions menu of your service team, select Roles > Assign Roles to assign case solvers.
9. (Optional) ../../../../manage-workday/tenant-configuration/custom-objects-and-labels/dan1370796580624.dita.

   Replace Case with the preferred term in your organization.
10. (Optional) Access the Maintain Case Management Flags task.

    Create flags that case creators can apply to cases. A flag name can't exceed 40 characters. You can't delete flags, but you can make them inactive. You can have a maximum of 20 active flags at a time. Examples: Low Priority, Critical.
11. (Optional) Access the Maintain Case Suggestions task.

    Provide links that workers can use to find answers for their questions. You can link to:

    - Help articles.
    - External web pages.
    - Workday Learning content.
    - Workday tasks.
12. Access the Create Case Routing Rule task.

    Create rules to route cases to teams based on case parameters. Examples: location, type, category, source, and description.

13. Access the Maintain Case Routing task.

    Apply the routing rules. Workday routes unassigned cases to the default service team.

    You can use the Evaluate Case Routing Rules task to test complex rules and determine that they route cases as expected.

14. (Optional) configure-case-notifications.dita.
15. (Optional) Access the Maintain Case Statuses task.

    Use the default case statuses to organize your workflow. Examples: New, In Progress, On Hold, Canceled, and Resolved. You can provide overrides for any or all of them.

    Select the On Hold pauses SLAs check box to specify that on-hold cases are temporarily exempt from SLAs.

    Note: You can also add, remove, or deactivate case substatuses related to case statuses. You can have a maximum of 10 active substatuses. Examples: In Progress > Triaging or On Hold > Assignee on vacation.

16. (Optional) Access the Maintain Case Label Categories task.

    Create, remove, or deactivate case label categories. You can have a maximum of 100 active label categories at a time. Examples: Needs Approval, Resolutions.

17. (Optional) Access the Maintain Case Labels task.

    Create, remove, or deactivate case labels. You can't remove labels that you've already applied to cases but you can make them inactive. Examples: Information Needed, Duplicate.

18. (Optional) Access the Manage Help Case SLAs task.

    Define metrics for case solvers to respond to or resolve their cases. Example: You can define a metric that states that all case solvers must resolve their case within 2 hours of its creation.

    Clear the Active check box for a service team to exempt it from an SLA.

19. (Optional) Access the Manage Help Case SLAs task to define an SLA schedule for a given SLA metric.

    Use SLA schedule to define service team operational hours for a given SLA metric. You can define metrics that take into account time zones and nonworking hours, such as weekends and holidays. Workday calculates the SLA time target based on the schedule, providing greater accuracy when tracking SLAs.

20. (Optional) Access the Manage Help Case Message Templates task.

    Create and manage message templates that enable case solvers to reply quickly to cases with predefined messages. Example: You can create a template that contains instructions for submitting an expense report.

    You can include text, report fields that dynamically populate data, articles or tasks, and file attachments to message templates. You can also assign templates to service teams, enabling only the designated teams to access and use the specified templates.

21. (Optional) set-up-case-satisfaction-surveys.dita.

    Create case satisfactions surveys to send to employees when a case solver closes their case.

22. (Optional) Set up a business process step to create cases.

    Steps--Set-Up-a-Business-Process-Step-to-Create-Cases.dita

23. (Optional) Access the Manage Help Case Information task.

    Change the default employee information that displays in the Help workspace. You can specify up to 15 fields that apply globally or to specific teams.

24. (Optional) set-up-case-validations.dita.
25. (Optional) Set up email case creation.

    See jko1676579103302.dita.

26. (Optional) Set up email case communication.

    See ntm1657193282088.dita.

27. (Optional) Add cards to the Home page.

    Add cards to give employees brief updates on their Help cases and enable easy access to them. Single Case cards display the current status of a case and provide access to the full case view. Multiple Cases cards display when an employee has more than 2 active cases. They provide access to the My Cases report.

    See Concept: Home Page Workspace.

28. Access the Edit Tenant Setup - Help task.

    Manage tenant-wide settings for Workday Help.

    As you complete the task, consider:

Option	Description
Notification Display Details	Specify whether you want to display limited or complete details in the case notifications.
Access	Decide whether case solvers can access all cases or only cases assigned to their service teams.
Enable Case Linking	Specify whether case solvers can link cases together.
Custom Text	Specify custom text to display for users on the Create Case task when creating a case.
Article	Specify a Knowledge article to display for users on the Create Case task when creating a case.
Enable Case Owners to Reopen Cases	Enable case owners to reopen cases resolved from less than 7 days from the Help Center. With this option enabled, case owners still can't reopen cases resolved for more than 7 days. This option doesn't apply to external case owners.

    See ../../../../manage-workday/tenant-configuration/tenant-setup/che1594214441572.dita.

Result

Workers can create cases that route to the configured service teams. Administrators can also create new case types. Case solvers can create cases on a worker's behalf.

Next Steps

Use the Maintain Dashboards report to add the Help:

- Worklet.
- Workspace.
- Dashboard.

Related Information

Concepts

Concept: People Experience

Workday Community: Generally Available Innovation Services - Descriptions and Exhibits

2021R1 What's New Post: Case Substatuses

2021R2 What's New Post: Case Collaboration

2023R1 What's New Post: Case Linking

2023R1 What's New: Case Communication by Email

2024R1 What's New: Dynamic Fields on Help Case Message Templates

Steps: Set Up Email Case Creation

Prerequisites

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.

Steps: Set Up Case Management on page 3021.

Context

You can set up email case creation for both workers who have access to Workday and external users who don't have access to Workday.

When you enable email case creation:

- Workers and external users can create new cases by email.
- Case solvers can view cases created by email in the Help Workspace.
- Case solvers can block external users to prevent unwanted case creation access.

Steps

1. Access the Edit Tenant Setup - Help task.

   As you complete the Email ~Case~ Creation section, consider these options:

~Case~ Creation Options	You can enable case creation for: • Only workers who have access to Workday Help. • Workday Help users and external users who don't have access to Workday.
Email Address Selection	Workday enables you to: • Create a case for the contact who initially sent the email (the Original Sender). • Create a case for the contact who most recently forwarded or generated the email (the email address in the *From Email* field).
Configure emails to exclude from ~case~ creation	Workday enables you to exclude entered email addresses from automatically creating emails by using the Excluded ~case~ creation email addresses field.
Manually assign the ~case~ owner if the ~case~ owner can’t be recognized	We enable you to manually assign the case owner if Workday can’t easily identify the case owner, enabling you to avoid incorrectly assigned cases.

   Security: *Set up: Help Case Management* domain in the Help functional area.

2. Steps: Set Up Email Ingestion.

   A case owner may not be recognized from email ingestion if:

   a. There are multiple contacts in the ‘To’ field. We recommend entering one email address in the ‘To’ field.
   b. The case creation email is included in the ‘Cc’ field.
   c. The email contains a long or complex email chain with multiple contacts or forwards. If the Manually assign the ~case~ owner if the ~case~ owner can’t be recognized check box is enabled, the case is created as unassigned and you can manually assign the correct case owner.

   If there’s no case owner assigned the Send option for a case message will be disabled for the case solver.
3. Configure Email Ingestion Settings

   - In the Configure Email Ingestion Settings task, select Help Case Creation from the drop down.
   - You must use separate email receiving domains for the Help Case Creation and Help Case Reply notification types.

   Security: *Set Up: Inbound Email* domain in the System functional area.
4. (Optional) Create Calculated Fields

   You can use calculated fields to display email metadata to case solvers in the case view to assign a case owner if it isn’t immediately identifiable.

   a. Enter *Original Sender, Email From* or *Email Addresses in the Email Ingestion Delivery Chain* in the Field Name field.
   b. Select *Case* as the Business Object from the drop down.
   c. Enter *Lookup Related Value* in the Function field.
   d. In the *Calculation* tab, enter *Inbound Email* in the Lookup Field field and *Original Sender, Email From* or *Email Addresses in the Email Ingestion Delivery Chain* in the Return Value field.
   e. Use the *Global* or the *Team Specific* tab on the Manage Help Case Information task to configure the field display. See Set Up Help Case Information.
5. (Optional) Steps: Set Up Email Case Communication on page 3026.

   You can set up email case communication so case owners can communicate with case solvers by email after creating a case.

Related Information

Concepts

Concept: Email Ingestion

2023R1 What's New Post: Case Communication by Email

Workday Community: Workday Help: Case Creation and Case Communication by Email

Tasks

Configure Email Ingestion Settings

Steps: Set Up Email Case Communication

Prerequisites

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.

Steps: Set Up Case Management on page 3021.

Context

Email case communication enables case solvers and owners to communicate by email:

- Both workers who have access to Workday and external users who don't have access to Workday can communicate with case solvers by email.
- Case owners can view case solver replies and case updates from their email account.
- Case solvers can reply to an external case in the Help Workspace, and Workday then delivers the message to the email account of the case owner.
- Case solvers can block external users to prevent unwanted communication.

Steps

1. Access the Edit Tenant Setup - Help task.

   In the Notifications section, select Complete: Display details in notifications such as title, assignee, attachment alerts.

   In the Case Communication section, select Enable case replies within Workday and by email.

   Security: *Set up: Help Case Management* domain in the Help functional area.
2. Set up email ingestion to process inbound email. See ../../../../manage-workday/tenant-configuration/notifications-and-alerts/email-notifications/email-ingestion/bvx1657205354171.dita.

   In the Configure Email Ingestion Settings task, select Help Case Reply and add an email ingestion receiving domain. You must use separate email receiving domains for the Help Case Creation and Help Case Reply notification types.

   Workday recommends using the Workday-provided receiving domain because it doesn't require any setup for your company. It also eliminates the additional configurations steps that customer-provided receiving domains need after a non-Production refresh. If you set up your own email ingestion receiving domain, you must complete additional steps. See Steps: Set Up Customer-Provided Receiving Domains.

   If you have configured their email case ingestion settings with Most Recent Sender,Workday recommends disabling the Case Creation - Notify Case Owner Notification Manage ~Case~ Notification Recipients' task and its '~Case~ Creation - Notify ~Case~ Owner' Notification' to disable

   Email ingestion only supports one email address and doesn't support the ingestion of multiple addresses in a single email or emails included in a forwarding chain. You should only have one address in the *To* field.

   Note: When you use the Workday-provided receiving domain, you must reselect it after every non-Production refresh using the Configure Email Ingestion Settings task in your non-Production tenant.
3. (Optional) Access the Manage ~Case~ Notification Recipients. If you have configured your email case ingestion settings with Most Recent Sender, Workday recommends disabling the Case Creation - Notify Case Owner Notification to prevent loop notifications.
4. Access the Edit Tenant Setup - Notifications task.

   In the Notification Delivery Settings section, click the Help tab.

   In the Rule prompt, create a new notification routing rule.

   In the Channel Frequencies section, click Add.

   For the Channel prompt, select Email.

   Security: *Set Up: Tenant Setup - BP and Notifications* in the System functional area.

Related Information

Concepts

Concept: Email Ingestion

2023R1 What's New Post: Case Communication by Email

Workday Community: Workday Help: Case Creation and Case Communication by Email

Tasks

Configure Email Ingestion Settings

Steps: Set Up a Business Process Step to Create Cases

Prerequisites

- Steps: Set up Case Management.
- Steps: Create Custom Business Processes.

Context

You can configure a step in your custom business process to create and assign cases automatically, further streamlining the case creation process.

Steps

1. Access the Edit Tenant Setup - Help task.

   In the Business Process Case Creation section, enter a default external case contact.
2. Select Business Process > Edit Definition from the related actions menu of your business process.
3. Select an Effective Date for when the business process definition changes take effect.
4. Create a new step.

   Select Service as the Step Type.

   In the Specify field, select Create Case as the service type.
5. Click OK.
6. Click the Configure Create Event Service Configuration button.

   (Optional) Enable the setting to block the business process until the case is resolved.

   Select the worker that the business process creates the case for.

   (Optional) Select the worker that the business creates the case about.

   Select the type of case that the business process creates.

   Enter the case title that the business process creates.

   (Optional) Enter the case description that the business process creates.

Result

The customized business process now automatically creates cases based on your Create Case service step configuration.

Related Information

Concepts

2023R2 What's New Post: Create Cases from a Business Process

Configure Case Notifications

Prerequisites

Security:

- The *Set Up: Help Case Management* domain in the Help functional area.
- The *Set Up: Tenant Setup - BP and Notifications* domain in the System functional area.

Context

You can configure and target case notifications to fit the specific use cases and needs of your organization. By configuring case notifications, you can determine which notifications Workday sends to case owners, case solvers, and collaborators.

Steps

1. Access the Manage Case Notification Recipients task.

   As you complete the task, consider:

Option	Description
Case Owners	Configure the notifications sent to internal and external case owners. Select the Notify Internal Case Owner check box to send the notification to an internal case owner. Select the Notify External Case Owner check box to send the notification to an external case owner. To send a notification to external stakeholders, you must: • Configure an email notification delivery channel for Help notifications in the Edit Tenant Setup - Notifications task. • Select the Enable case replies within Workday and by email option in the Case Communication section of the Edit Tenant Setup - Help task.
Case Solvers	Configure the notifications sent to case solvers and service teams. Select the Notify Assigned Case Solver check box to send the notification to the assigned case solver. To send a notification for an unassigned case to all members of a service team, select the Notify Team if Unassigned check box.
Collaborators	Configure the notifications sent to case collaborators. Select the Notify Case Collaborator check box next to a notification to send it to a case collaborator.

2. Click OK.

Result

Example

Next Steps

Related Information

Concepts

2024R2 Feature Release Note: Case Notification Configuration

Create Case Validations

Prerequisites

Security: *Set Up: Custom Validations* in the System functional area.

Context

You can create custom case validations with a severity of *Critical* that require case solvers to complete specific fields before resolving a case.

Based on the rule conditions in your case validation, Workday

- Prevents case solvers from resolving a case until they enter values for the required fields.
- Displays an error message to case solvers that displays the required fields to resolve a case.

Note: Case validations only support the *Critical* severity.

Steps

1. Access the Maintain Custom Validations report.
2. Select the Case transaction type.
3. Click New Validation to create a new case validation.
4. Enter a description for the case validation rule.
5. Add one or more rule conditions.

   As you complete the task, consider:

Option	Description
And/Or	When 2 or more statements exist in the expression, set this condition to control how the statements relate to each other.
()	Use parentheses for 3 or more statements and a combination of And and Or conditions.
Source External Field or Condition Rule	The field or condition rule you select as the source determines which other options are available. Example: The Case Assignee report field
Relational Operator	These options depend on the data type. Example: *is empty*
Comparison Value	Based on the Comparison Type, select a comparison field or enter a value to compare to the source.

6. Click OK.

Result

When attempting to resolve a case without completing the required fields, case solvers now receive an error message that prevents them from resolving a case.

Example

Next Steps

Related Information

Concepts

2024R2 Feature Release Note: Case Validations

Create a Case from a QuickTip

Prerequisites

- Workday Help SKU
- Steps: Set Up and Manage the Guidance Workspace
- Security: *Set Up: Tenant Setup - System* in the System functional area.

Context

You can enable users to create a Workday Help case from a QuickTip and reduce the number of abandoned tasks or tasks completed with errors. This improves case resolution metrics, reducing case resolution time and improving case satisfaction scores, because the case solver knows the task the worker or manager created their case from.

Steps

1. Access the Edit Tenant Setup - System task.
2. Select the Allow Help Cases to be created from QuickTips check box to display the Create a case link on all published QuickTips.
3. (Optional) Select a default case type in the Default Help Case Type made from QuickTip field. Setting a default case type applies to all QuickTips published from the Guidance Workspace.
4. Save your changes in the Edit Tenant Setup - System task.

Result

The Create a case link now appears in QuickTips in your tenant. If a worker selects the link, they will be redirected to the *Create Case* task and the *Case Type* and *Case Title* fields are pre-populated if a default case type is set in the Edit Tenant Setup - System task.

Example

You're a case solver working with the Allow Help Cases to be created from QuickTips check box enabled in your tenant. A new joiner is completing the *Get Feedback on Self* task. While completing the task, they are unsure which template to use and select the Create a case link in the QuickTip associated with the Feedback Template field. In the *Overview* tab on the case in your queue, you can see that the case was created from the *Get Feedback on Self* task and the time it was created. You use this context to respond in a timely manner.

Next Steps

Set Up Case Satisfaction Surveys

Prerequisites

- Security: These domains in the System functional area:
  - *Business Process Administration*
  - *Manage: Business Process Definitions*
- Set up case management. See Steps: Set Up Case Management on page 3021.

Context

You can set up case satisfaction surveys to collect employee feedback after a case solver resolves their case. Case satisfaction surveys enable you to measure employee satisfaction and improve your employee support model. Employees can view and complete case satisfaction surveys in My Tasks and on the case view.

Steps

1. From the related actions menu of the *Resolve Case* business process, select Business Process Policy > Edit.
2. In the Who Can Do Action Steps in the Business Process section, add the *Employee as Self* security group to the*Complete Case Satisfaction Survey* action step and click OK.
3. ../../../../authentication-and-security/configurable-security/security-change-control/dan1370796405018.dita.
4. Access the Create Case Satisfaction Survey Configuration task.

   As you complete the task, consider:

Option	Description
Survey Configuration Name	Enter a name for the survey.
Survey Rating Description	The rating scale for the survey. Workday uses a 1 - 5 to survey scale, with 1 being *Very Dissatisfied* and 5 being *Very Satisfied*. You can't modify the survey rating.
Survey Question Text	Select the default survey question or enter custom text for the survey question. The default survey question text is *How was your experience?*
Include Feedback Field	Enable this field to include a text field on surveys where the employee can enter additional qualitative feedback.
(Optional) Additional Survey Questionnaire	You can add a questionnaire with additional questions to the survey. The questionnaire must have *Case* as the value for the Questionnaire Types field. See ../../../../manage-workday/business-processes/questionnaires/tso1611016403011.dita.

5. Click OK.
6. From the related actions menu of the *Resolve Case* business process, select Business Process > Edit Definition.
7. Enter an Effective Date and click OK.
8. Add a new step on the Business Process Steps tab to send the case satisfaction survey.

   As you complete the task, consider:

Option	Description
Order	Enter an Order value that places the step after the defined completion step of the business process.
Type	Select Action as the step type.

Option	Description
Specify	Select Complete Case Satisfaction Survey.
Group	Select the *Employee as Self* security group.
(Optional) Due Date	Enter a due date to automatically remove unanswered case satisfaction surveys from My Tasks and the case view for employees. Workday removes unanswered surveys after the designated due date has passed.

9. Click OK.
10. On the new business process step, click Configure Complete Satisfaction Survey.
11. Enter an Effective Date and click OK.
12. Select your new Case Satisfaction Survey Configuration.
13. Click OK and Done.

Result

Workday now sends case satisfactions surveys to employees after a case solver resolves their case.

To view and analyze all survey responses, you can create a custom report using the Case Satisfaction Survey Responses report data source.

Example

Next Steps

Related Information

Concepts

2024R2 Feature Release Note: Case Satisfaction Surveys

Set Up External Record Linking on Cases

Prerequisites

- Set up Case Management.
- Create an integration system user (ISU).
- Security: *Help External Records* domain in the Help functional area.

Context

You can set up external record linking for Help cases in Workday. External record linking enables an ISU to use the External Records APIs in the Help Case REST service to add, modify, and delete links to external records on your Help cases.

Case Solvers can use external record links on cases to manage related cases and navigate between multiple Workdays.

Example: You use Help cases to track internal employee cases and a different system to track service outage issues. When an outage occurs and employees open new cases, you use external record linking to display a link to the related service outage issue on the cases. After fixing the service outage, your case solvers can easily identify and resolve the related Help cases that have the external link to the issue.

Steps

1. Access the Edit Tenant Setup - Help task.

   Select the Enable External Record Linking check box.
2. Click OK.
3. Edit Domain Security Policies.

   Confirm that the security group for your ISU has permissions to the *Help External Records* security domain in the Help functional area.
4. Access the Workday REST Services Directory to configure and use the External Records APIs in the Help Case REST service.

   To obtain the source Id of an external system, the ISU can use the Prompt Values API in the Help Case REST service to perform a GET request.

Result

You can use the External Records APIs in the Help Case REST service to add, modify, and delete external record links on cases. When you add an external record link to a case, Workday will send a notification to the assigned case solver informing them of the new link.

Set Up Help Engagement Metrics

Prerequisites

Security: *Reports: Help Engagement Metrics* in the Help functional area.

Context

You can use this report to track user engagements with Workday Help articles, enabling you to analyze and improve your organization's knowledge base.

Steps

1. Access the Help Article User Engagement Metrics report.
2. Enter the Start Time and End Time. The report displays entries from June 5 2024 and you can access data data for 3 years prior, until June 5th 2024. Data is only available in production tenants, you won’t be able to access results in your Sandbox tenant.
3. The report displays a table of entries:

Option	Description
Article	The Help article available in the tenant.
Article View	The number of views a Help article receives.
Click ~Case~ creation from Article	The number of users that click Create Case on a Help article.
~Case~ created from Article	The number of users that click Create Case on a Help article and then create a case.

4. (Optional) You can drill down into the engagement metrics in the popup that displays when you click the count in the Article View, Click ~Case~ creation from Article or ~Case~ created from Article columns. The popup displays these entries:

Option	Description
Help Engagement Type	The engagement type for the drilldown you've clicked into.

Option	Description
Device Type	The device type from when the event was tracked.
Related Primary Job Location	The location of the worker.
Has Access to Manage Help Articles	Indicates if the creator is a content author.
Is Service Team Member	Indicates if the creator is a case solver.

5. (Optional) If you have access to the *Help: Case Data* domain, the popup displays these additional columns:

Option	Description
~Case~	The case that was created from the Help article.
Initial Assigned ~Case~ Type	The assigned case type for that case.

Result

You can use the report to:

- Understand self-service adoption across your worker population.
- Provide insights on potential content gaps through access to cases generated after a worker engages with a Workday Help Article.

Example

Next Steps

Example: Create a Case Type for 401(k) Savings Plans

This example describes how to create eligibility and routing rules, service teams, categories, subcategories, and case types.

Context

You want to enable U.S. workers to create cases with inquiries about their 401(k) plans and route qualifying cases to a Benefits (USA) service team.

Prerequisites

Security: *Set Up: Help Case Management* domain in the Help functional area.

Steps

1. Access the Create Case Type Eligibility Rule task.
2. In the Description field, enter *401k Eligibility*.
3. Enter these Rule Conditions values:

Field	Value
Source External Field or Condition Rule	*Primary Home Address - Country*
Relational Operator	*in the selection list*
Comparison Value	*United States of America*

4. Click OK.
5. Create a *Benefits (USA)* service team and assign roles to it.

   See Example: Create a Benefits (USA) Team and Assign Roles to It on page 3036.
6. Create a *Benefits* service category and a *USA Benefits* subcategory.

   See Example: Create a Benefits Service Category and 401k Queries Case Types on page 3037.
7. Create a case routing rule that directs *401k Queries* case types to the Benefits (USA) service team.

   See Example: Route 401k Queries to a Benefits (USA) Team on page 3037.

Result

U.S. workers can create cases for their 401(k) queries that automatically route to the Benefits (USA) service team.

Next Steps

(Optional) Create a questionnaire for the *401k Queries* case type.

Example: Create a Benefits (USA) Team and Assign Roles to It

This example describes how to create a service team and assign roles to it.

Context

You want to create a service team and assign roles to it for solving benefits queries in the U.S.

Prerequisites

Security: *Set Up: Help Case Management* domain in the Help functional area.

Steps

1. Access the Create Service Team task.
2. In the Service Team Name field, enter Benefits (USA).
3. Click OK and Done.
4. Access the Maintain Assignable Roles task.
5. Add a role with these values:

Field	Value
Role Name	*Case Solver*
Enabled for	*Service Team*
Assigned by Security Groups	*Security Administrator*

6. Click OK and Done.
7. Access the View Service Team report.
8. From the Service Team prompt, select *Benefits (USA)*.
9. Click OK.
10. Select Roles > Assign Roles from the related actions menu of the Benefits (USA) service team.
11. Select an effective date.
12. Click OK.
13. In the Assign Roles grid, from the Role prompt, select *Case Solver*.
14. From the Assign To prompt, select *Denis O'Dell*.

15. Click OK and Done.

Result

Denis O'Dell is a case solver assigned to the Benefits USA service team and can work on cases routed to this team.

Example: Create a Benefits Service Category and 401k Queries Case Types

This example describes how to create a service category and subcategory, as well as related case types.

Context

You want to create a *Benefits* service category and a *USA Benefits* subcategory to organize your cases and 401k-related case types.

Prerequisites

Create an eligibility rule for 401k-related case types using the Create Case Type Eligibility Rule task.

Security: *Set Up: Help Case Management* domain in the Help functional area.

Steps

1. Access the Manage Service Categories report.
2. Select Create Service Category.
3. In the Name and Description fields, enter *Benefits*.
4. Click OK.
5. Click Create Service Category again.
6. In the Name and Description fields, enter *USA Benefits*.
7. Select the Is this a subcategory? check box.
8. From the Parent Service Category prompt, select *Benefits*.
9. Click OK.
10. Click Create Case Type.
11. Enter these Rule Conditions values:

Field	Value
Name	*401k Queries*
Service Category	*USA Benefits*
Eligibility Rule	*401k Eligibility*

12. Click OK.

Result

You can use the *Benefits* service category and *USA Benefits* subcategory to organize your cases and 401k-related case types.

Example: Route 401k Queries to a Benefits (USA) Team

This example describes how to create a routing rule that directs certain case types to a specific service team.

Context

You want to route your 401k queries to your U.S. Benefits service team.

Prerequisites

Security: *Set Up: Help Case Management* domain in the Help functional area.

Steps

1. Access the Maintain Case Routing task.
2. Add a row in the grid.
3. From the Case Routing Rule prompt, access the Create Case Routing Rule task.
4. Click OK.
5. In the Description field, enter *401k Queries* .
6. Enter these Rule Conditions values:

Field	Value
Source External Field or Condition Rule	*Case Type*
Relational Operator	*in the selection list*
Comparison Value	*401k Queries*

7. Click OK.
8. From the Service Team prompt, select *Benefits (USA)*.
9. Click OK and Done.

Result

U.S. workers assigned to the Benefits (USA) service team can work on *401k Queries* routed to this team.

Example: Create a Workday Help Service Level Agreement Schedule

This example describes how to create a Workday Help SLA schedule based on a specific service team's operational hours.

Context

You want to create a service level agreement (SLA) schedule for the Payroll service team. The service team is located in London and operates Monday through Friday on a 9 to 5 schedule, including a holiday on Christmas Day. You create a custom SLA schedule with a schedule name of London.

Prerequisites

Security: *Set Up: Help Case Management* domain in Help functional area.

Steps

1. Access the Create SLA Schedule task.
2. In the Name prompt, enter *London*.
3. Select *GMT United Kingdom Time (London)* in the Time Zone prompt.
4. In the Operational Hours grid, add a row for each weekday that the Payroll team is operating (Monday to Friday).

   Omitting Saturday and Sunday means that any associated SLA metric will exclude these hours when calculating the time to complete for the SLA.
5. Select a different day of the week on each row for the Day prompt.
6. For each row in the Start Time field, enter *09:00 AM*.
7. Enter *05:00 PM* in the End Time field.

8. In the Holidays grid, add a row.

   Holidays are full days that any associated SLA metric will exclude when calculating the time to complete for the SLA.
9. In the Holiday Name field, enter *Christmas Day*.
10. Select *December 25th, 2022* on the Date prompt.

    To be a recurring holiday, you need to add this day in the holiday schedule for each year.
11. Click OK and Done.

Result

You can now link custom SLA schedules to service teams operating in the same time zone and have matching operational hours and holidays.

You can access the details of the SLA schedule through the View SLA Schedule report or modify the content through the Edit SLA Schedule task.

Next Steps

Create a Workday Help service level agreement (SLA).

Related Information

Concepts

2022R2 What's New Post: Service Level Agreement Management

Example: Create a Workday Help Service Level Agreement

This example describes how to create a Workday Help service level agreement for a specific team that reflects their operational hours.

Context

You want to create a service level agreement (SLA) for the Payroll service team located in London. You use a custom schedule based on the Payroll service team's operational hours and require a first response target time of 1 hour.

Prerequisites

Create:

- A Payroll service team.
- A service level agreement (SLA) schedule with a schedule name of London.

Security: *Set Up: Help Case Management* domain in Help functional area.

Steps

1. Access the Manage Help Case SLAs task.

   Select *Time to First Response* at the SLA Metric prompt.
2. In the Individual Team Settings grid, add a row.
3. From the Service Team prompt, select *Payroll*.
4. Select the Active check box.
5. In the Time Target (Hours) prompt, enter *1*.
6. From the SLA Schedule prompt, select *London*.
7. Click OK and Done.

Result

Workday notes Payroll cases that don't receive a response from the service team within 1 hour and makes their details available through these reports:

- Help SLA Passed vs Failed.
- Help SLA Performance - Cases Opened Within The Last Month.

The SLA calculation only considers the operational hours that you specified when calculating the time to complete the SLA. You can view the custom schedule on the View SLA Schedule report.

Reference: Case Management Notifications

Workday delivers case management notifications to keep case owners, case solvers, and collaborators informed of new cases and updates to existing cases.

Case Management Notification Recipients

Recipient	Description
Case Owner	An employee specified in the For field on a case. This field can record: • An employee who created a case for themselves. • An employee who someone else created a case for. Note: Employees added in the Create About field don't receive any notifications.
Case Solver	An employee assigned to work on and resolve a case. Case solvers can update the Created For field on a case and assign it to an internal employee or external contact.
Collaborator	An employee tagged in an internal note on a case.

Case Owner Notifications

Notification	Description
Case Assignee Change - Notify Case Owner	Notifies the case owner of a new case solver assignment or reassignment for their case.
Case Attachment - Notify Case Owner	Notifies the case owner when a case owner, case solver, or case collaborator adds an attachment to their case.
Case Creation - Notify Case Owner	Notifies the case owner when: • They create a case for themselves. • Someone else creates a case on their behalf.
Case Owner Change - Notify Case Owner	Notifies the new case owner when they have been assigned as the new case owner of a case.
Case Reply - Notify Case Owner	Notifies the case owner when a case solver adds a new message to their case.

Notification	Description
Case Service Team Change - Notify Case Owner	Notifies the case owner when the assigned service team for their case changes to a different team.
Case Status In Progress / In Review / On Hold - Notify Case Owner	Notifies the case owner when their case moves to a status of *In Progress*, *On Hold*, or *In Review*.
Case Status Resolved / Canceled - Notify Case Owner	Notifies the case owner when a case solver resolves or cancels their case.
Case Type Change - Notify Case Owner	Notifies the case owner when the case type on their case changes.

Case Solver Notifications

Notification	Description
Case Assignee Change - Notify Case Solver	Notifies the newly assigned case solver when a case is assigned to them.
Case Attachment - Notify Case or Service Team	Notifies the assigned case solver or service team when a case owner, case solver, or collaborator adds an attachment to a case.
Case Creation - Notify Case Solver or Service Team	Notifies the assigned case solver or service team of a new case.
Case External Record Linked or Delinked - Notify Case Solver or Service Team	Notifies the assigned case solver or service team of: • A new link to an external record on a case. • The removal of an existing link to an external record on a case.
Case Internal Note - Notify Case Solver or Service Team	Notifies the assigned case solver or service team of a new note added to a case.
Case Reply - Notify Case Solver or Service Team	Notifies the assigned case solver or service team of a new reply to a case.
Case Service Team Change - Notify Case Solver or Service Team	Notifies the case owner or service team when the assigned service team for their case changes to a different team.
Case Solver Digest - Notify Case Solver	Notifies all case solvers with a summary of: • Comments and notes added to assigned case in the past 24 hours. • New assigned cases in the past 24 hours.
Archived Case Attachment - Notify Case Solver or Service Team	Notifies the assigned case solver or service team when a case owner adds an attachment to a resolved or canceled case.
Archived Case Reply - Notify Case Solver or Service Team	Notifies the assigned case solver when a case owner adds an attachment to a resolved or canceled case.

Collaborator Notifications

Notification	Description
Case Attachment - Notify Case Collaborator	Notifies a collaborator when a case owner, case solver, or case collaborator adds an attachment to their case.
Case Internal Note - Notify Collaborator	Notifies a collaborator of a new note added to a case.
Case Note Tagging - Notify Collaborator	Notifies a collaborator when a case solver or case collaborator mentions them on a case note.
Case Reply - Notify Case Collaborator	Notifies a collaborator when a case owner adds a new message to the case.
Case Sharing - Notify Collaborator	Notifies a collaborator that another collaborator or case solver shared a case with them. The notification also contains a link to the shared case.
Case Type Change - Notify Case Collaborator	Notifies a collaborator when a case solver changes a case type to one that removes viewing access for the collaborator. Example: Changing the case type from non-confidential to confidential.

Related Information

Concepts

2024R2 Feature Release Note: Case Notification Configuration

FAQ: Case SLAs

When does the timer for an SLA start?	The SLA timer starts when a case creator initially creates a case.
When does the timer for an SLA stop	The SLA timer stops when a case solver marks the case as resolved. Workday stops the Time to First Response metric once a case solver adds a response to the case.
What happens to an SLA when I reopen a case?	The SLA timer doesn't restart or continue when you reopen a case. Workday displays the initial passing or failure of SLA on a reopened case. If you resolve a case without leaving a comment, Workday doesn't mark the Time to First Response metric as passed. Passing the Time to First Response metric requires leaving a comment.
What happens to an SLA when I assign a case to a different service team?	The SLA doesn't reset. Workday carries over the time passed from the SLA of the initial assigned service team and applies it to the SLA of the new assigned service team. If the initial assigned service team failed an SLA, it continues to display as failed for the new assigned service team.

What happens to an SLA when I put a case On Hold?	SLA functionality for cases On Hold is dependent on the On Hold pauses SLA option on the Maintain Case Statuses task. If you enable the On Hold pauses SLA option, the SLA timer for cases with a On Hold status or substatus pauses. Once you change the On Hold status or substatus, the SLA timer restarts. Workday then recalculates the remaining SLA time to failure based on the time target and the SLA schedule. If you don't enable the On Hold pauses SLA option, the SLA timer uses the same functionality for cases that have any open status.

Knowledge Management

Steps: Set Up Knowledge Management

Prerequisites

- Steps: Set Up People Experience.
- Steps: Set up Drive.
- Ensure you're not in a proxy session. Knowledge Management doesn't support proxy sessions.

Note: You might need to take additional steps to enable this feature based on your organization's subscription service agreement. Your organization is either on the Main Service Agreement (MSA) or the Universal Main Service Agreement (UMSA). To determine your organization's subscription service agreement:

1. Select your profile avatar on Workday Community.
2. Select Profile.
3. On your profile page, select your organization's name, which is beneath your name and next to your job title.
4. View your Subscription Service Agreement value.

If the value is:

- *UMSA*, the feature is automatically available. You can skip the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step. For more information on Machine Learning data contributions, see Concept: Workday AI for Universal Main Subscription Agreement Customers.
- *MSA*, you must enable this feature through Innovation Services using the Enable Innovation Services Features and Machine Learning Data Contributions for MSA Customers step.

Note: UMSA customers don't have Innovation Services tasks and reports in their tenants as these are for MSA customers only. UMSA customers can ignore all information regarding Innovation Services.

Context

Knowledge management in Workday enables you to share information with your employees through articles created in Workday. Articles can reduce and deflect internal cases submitted by your employees and enable them to become more self-sufficient. Article authors and editors can draft, share, and collaborate with one another to create optimized content for your employees. Before you create articles, you can configure security settings that enable you to define target audiences and categories to associate articles with.

Steps

1. Enable Innovation Services Feature and AI Data Contributions for MSA Customers

   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.

   On the Innovation Services Opt-In task, select the Help service on the Available Services tab in the People Experience category.

   (Optional) To enable AI and machine learning features for Knowledge Management, select the Knowledge Management Articles category within the People Experience: User Experience Machine Learning service on the Maintain Innovation Services and Data Selection Opt In task.
2. Access the Edit Tenant Setup - Machine Learning task.

   Select the region in which Workday hosts data used for improvement and personalization of machine learning and analytics functionality.

   Security: *Set Up: Tenant Setup - Machine Learning* in the System functional area.
3. Enable the Help functional area.

   See Steps: Enable Functional Areas and Security Policies.
4. Edit Domain Security Policies.

   Grant security groups permissions to these domains in the Help functional area:

   - *Self-Service: Help Articles*. Enables authors to access draft articles. Workday recommends you add Employee As Self as a security group with modify permissions to this domain. With this configuration, authors can save draft articles that aren't secured to any category.
   - *View: Help Articles*. Enables employees to view Help articles. Authors must also have access to this domain to use the Help Article workspace and article editor.
   - *Manage: Help Articles*. Enables authors to create and edit Help articles.
   - *Manage: Article Sharing Versions*. Enables authors to collaborate on Help articles by sharing and commenting on article drafts. Workday automatically provides access to this domain when you share an article draft with another author or collaborator.
   - *Set Up: Help Knowledge Management*. Enables you to configure article audience and category security, but not create articles.
   - *Reports: Help Knowledge Managements*. Enables you to create and access reporting and discovery boards for Knowledge Management.

   Grant security groups permissions to the *Drive* domain in the System functional area. Enables you to access the new Drive user interface to create and manage Workday files associated with workbooks and media files.
5. Activate Pending Security Policy Changes.
6. Access the Maintain Article Categories task.

   Create categories to associate articles with.

   Workday displays the category name on published articles. We recommend that you name your categories something that makes sense to both administrators and workers. Examples: Benefits, General HR, Payroll.

   Security: *Set Up: Help Knowledge Management* domain in the Help functional area.
7. Create target audiences for articles.

   See Steps: Create Article Audiences Using Condition Rules on page 3045.
8. Designate authors for articles, restricted by article category.

   See Steps: Create Article Authors on page 3046.

9. (Optional) Set up your tenant for discovery boards.

   You can create discovery boards for Knowledge Management using the Knowledge Base Article Versions report data source. Workday also delivers the Help Article discovery board that you can copy.

   See Steps: Set Up Tenant for Discovery Boards.
10. (Optional) Create Custom Reports.

    You can create custom reports for Knowledge Management using the Knowledge Base Article Versions report data source. Workday also delivers the Help Article Performance advanced report.
11. Create Articles on page 3047.

Related Information

Concepts

Concept: Knowledge Management on page 3053

Tasks

Steps: Set Up Security for Drive

Steps: Set Up Drive

Copy Workday-Delivered Discovery Boards

Reference

Workday Community: Available Innovation Services – Service Descriptions and Exhibits

Workday Help AI in Knowledge Management

Steps: Create Article Audiences Using Condition Rules

Context

You can use condition rules to create target audiences that restrict who can view a Help article. You can use existing or create new condition rules, providing you with flexibility for defining granular audiences. Knowledge management uses both Workday security and custom configuration to control visibility to articles. Condition rules enable you to manage these audiences without requesting security administrators to create and update segmented security groups.

By default, Workday indexes your article users and article audience condition rules reduce the amount of time it takes to evaluate article access. Workday runs a nightly job to index your article users and article audience condition rules. It can take up to 24 hours for new and updated indexed article audience condition rules to take affect.

Note: Workers, Students, and Service Center Representatives can access Help articles.

Steps

1. Access the Create Article Audience Rule task.

   Workday recommends that you create condition rules for 3 audiences:

   - *HR Admin*
   - *Manager*
   - *Public*

   You can select any existing condition rule as long as all the fields are on the Worker, Student, or Service Center Representatives business objects.

   Security: *Set Up: Help Knowledge Management* domain in the Help functional area.
2. Access the Maintain Article Audiences task.

   On the *Who Can View* column, select the condition rule that you want to apply to each audience.

   Security: *Set Up: Help Knowledge Management* domain in the Help functional area.

3. Edit Domain Security Policies.

   Review your domain security policy to ensure that users have sufficient privileges to the *View: Help Articles* domain in the Help functional area.

   Workday recommends that you provide a security group such as *All Employees* access to the *View: Help Articles* domain.

   Note: For a user to view an article, they must have access to the *View: Help Articles* domain and belong to the article's assigned audience.
4. Activate Pending Security Policy Changes.
5. (Optional) Access the Edit Tenant Setup - Help task.

   On the Knowledge Management tab, you can disable or enable indexed article evaluation. Disabling indexed article evaluation enables new and updated indexed article audience condition rules to take affect immediately, but also increases the amount of time it takes to evaluate article access.

   Security: *Set Up: Help Case Management* domain in the Help functional area.

Related Information

Reference

2021R2 What's New Post: Knowledge Management Audience Condition Rules

Steps: Create Article Authors

Prerequisites

Security: These domains in the Help functional area:

- *Manage: Help Articles*
- *View: Help Articles*
- *Self-Service: Help Articles*

Context

You can create article authors that restrict who can create and edit a Help article.

Note: Knowledge Management only supports unconstrained security groups.

Steps

1. Create Segment-Based Security Groups.

   Create unconstrained segment-based security groups based on article categories that represent the authors. Grant the security groups access to the category segments that they represent.

   Example:

Option	Description
Name	Enter *Article Authors: Benefits*.
Security Groups	Select *Benefits Administrator*.
Access to Segments	Select *Security Segments* > *Knowledge Base Article Category* > *Benefits (Active)*.
2. Edit Domain Security Policies.

   Grant your new segment-based security groups permissions to these domains:

   - *Manage: Help Articles* in the Help functional area.
   - *Drive* in the System functional area.
3. Activate Pending Security Policy Changes.

Result

Users with access to the *Manage: Help Articles* domain in the Help functional area can create and edit articles that have the category segment that their security group represents.

Related Information

Tasks

Steps: Set Up Security for Drive

Reference

2021R2 What's New Post: Knowledge Management Audience Condition Rules

Create Articles

Prerequisites

Security:

- *Manage: Help Articles*.
- *Drive* in the System functional area.
- *View Drive File and Media* in the System functional area.

Context

You can create articles and share them with target audiences, enabling workers to access information relevant to them more easily. Example articles:

- U.S. Paid Holidays
- Code of Conduct Policies
- Summer Party Details

Steps

1. Access the Create Article task.
2. As you complete the task, consider:

Option	Description
Language	Assign a language to the article. When article audience members specify a preferred language that matches the language you select, Workday displays that version of the article when they access an article from: • A direct link from another article. • A link from a journey. • A related article from another article. • Case Suggestions. • Workday Assistant. When audience members search for articles through global search, Workday displays all articles that contain the search text, regardless of the preferred language of the audience member. After Workday saves the first version of the article, click Add to create a translated version. Note: When you assign a language to an article, you must provide the translated

Option	Description
	content. Workday doesn't translate the content of the article to the selected language. You can create articles in any language that you have enabled in Workday.
Version History	Version History enables you to view, access, and edit previous or later versions of an article.
Category	Workday displays the categories that you created on the Maintain Article Categories task. Examples: Benefits, Expenses, Payroll, and Leave. You can filter articles by category in reports.
Who Can View	Select target audiences for the article. Examples: Public, Managers, and HR Admin.
Location	(Optional) Select a location that the article applies to so that Workday delivers the most relevant article in search results based on the location of the searcher. You: • Can only select 1 location. • Must have *View* access to location and location hierarchy to select it. If you need to create an article in different languages for one location, we recommend creating a base article and then creating multiple translated article versions from the base article. If you need to create articles that have a different language for each location, we recommend creating separate articles for each location and language.
Tags	Enter key words to associate your article with so that the article displays in search results when workers search on the key word.
Share	You can share the article draft with other users and add them as collaborators.
Comments	You can add comments for other article authors and collaborators to review and provide feedback.
Article Summarization with AI	(Optional) You can use AI to summarize the content in the article. You can also upload a DOCX or PDF file from your desktop or Drive and use AI to summarize the content of the file in the article.

Option	Description
Article Translations with AI	(Optional) After publishing an article, you can use AI to translate your content and create new translated versions of your article. Note: You must publish an article before creating translated article versions.

Result

When you publish an article, Workday surfaces the article through global search and Workday Assistant when you search for terms associated with the article.

Note: Workday automatically generates a reference ID for all business objects, including articles. While you can change reference IDs, changing article reference IDs results in loss of access to articles.

Next Steps

Access the Help Article Workspace task to manage your articles.

Related Information

Concepts

Concept: Knowledge Management on page 3053

Tasks

Steps: Set Up Security for Drive

Summarize Articles with AI on page 3050

Translate Articles with AI on page 3051

Bulk Article Upload

Context

Workday enables you to bulk upload up to 100 DOC or DOCX files as knowledge articles simultaneously. This feature streamlines the process of adding and creating content in your knowledge base, saving significant time and effort compared to creating articles individually.

This feature:

- Enables easier migration of existing documentation into Workday Help.
- Creates a large volume of knowledge management articles from existing documents.
- Reduces the manual effort required to build or expand your knowledge base.

Note: Images, videos, and PDFs can't be uploaded.

Steps

1. Access the Help Articles workspace.
2. Select the Upload Articles button.

   On the My Drafts tab, each file you upload through the pop-up window becomes a new, separate draft article.
3. Drag and drop up to 100 DOC or DOCX files into the upload area, or select them from your computer.

   After the upload, you can review, edit, and publish the articles according to the standard procedures of your organization.

Related Information

Reference

24R2 Release Note: Bulk Article Upload

Summarize Articles with AI

Prerequisites

- Set up Knowledge Management. See Steps: Set Up Knowledge Management on page 3043.
- On the Maintain Innovation Services and Data Selection Opt In task, select the Knowledge Management Articles category within the People Experience: User Experience Machine Learning service.
- Security:
  - *Manage: Help Articles View: Help Articles*, and *Self-Service: Help Articles* in the Help functional area.
  - *Drive* and *View Drive File and Media* in the System functional area.

Context

Using generative AI, you can summarize the content of an existing article or create a new summarized article from an uploaded DOCX or PDF file. Workday enables you to summarize the content into a general summary article, a frequently asked questions article, or a talking points for managers article.

Note: You can disable AI article summarization in the Edit Tenant Setup - Help task. See../../../../manage-workday/tenant-configuration/tenant-setup/che1594214441572.dita.

Steps

1. Access the article editor for an existing article or new article.
2. As you complete the task, consider:

Option	Description
Click the Generate Content icon.	Use this option to upload a DOCX or PDF file from your desktop or Drive that you want to summarize in a new article. Workday automatically attaches the source file to the article in an additional Source Document section. You can remove the attached source document and section after the summarization. Note: If you don't enter an article title, Workday uses the name of the file as the article title.
Select the Restructure with AI option in the Edit menu.	Use this option to summarize content of an existing article.

   You can summarize up to maximum of 5000 words with AI. The minimum amount of words you can summarize is 100.
3. Select the type of summary that you want to generate with AI.
4. As you complete the task, consider:

Option	Description
General Summary	Summarizes the content into Overview, Key Takeaways, Call to Action sections. The Key Takeaways section displays content in a numbered list.
Talking Points	Summarizes the content into Summary, Key Talking Points for Managers, and Call to Action

Option	Description
	sections. The Key Talking Points for Managers section displays content in a numbered list.
FAQ	Summarizes the content into Introduction and FAQ sections. The FAQ section displays content in a question and answer format.

Note: Workday adds an AI Generated label to articles with content summarized with AI.

5. Review the summarized content and click Publish.

Result

Users can now view the summarized article in Workday.

Related Information

Reference

2024R2 Feature Release Note: Article Summarization with AI

Translate Articles with AI

Prerequisites

- Set up Knowledge Management. See Steps: Set Up Knowledge Management on page 3043.
- On the Maintain Innovation Services and Data Selection Opt In task, select the Knowledge Management Articles category within the People Experience: User Experience Machine Learning service.
- Security:
  - *Manage: Help Articles View: Help Articles*, and *Self-Service: Help Articles* in the Help functional area.
  - *Drive* and *View Drive File and Media* in the System functional area.

Context

Using generative AI, you can translate the content of a published article to a new language. For each translation, Workday automatically creates a new version of the article with the text translated in the selected language.

Note: You can disable AI article translation in the Edit Tenant Setup - Help task. See../../../../manage-workday/tenant-configuration/tenant-setup/che1594214441572.dita.

Steps

1. Access a published article from the Help Articles workspace or the View Article task.

   Ensure that the selected article has the Base Article Version label. If a published article doesn't have the Base Article Version label, select Set as Base Article from the related action menu on the Translation section.

   Note: You can translate a maximum of 30,000 characters with AI.
2. In the Translations section, click Add Translation.
3. As you complete the task, consider:

Option	Description
Select Language	Select the language that you want to translate the article content to.

Option	Description
Select Option	Select Generate Translation from Base Article to create a new article version containing the translated text. Select Create Blank Article to create a new article version that contains no text. Use this option to provide your own manual translation.

4. Click Confirm.
5. Review the content and click Publish.
   Workday creates a new draft article version containing the translated text. We add an AI Generated label to the new draft article version. The original published article will have a Base Article Version label.
6. Review the translated content in the new version and click Publish to publish the translated article version.

Result

Users can now view a translated version of your article in Workday.

Related Information
Tasks
Apply Base Article Content Changes to a Translated Article Version on page 3052
Reference
2024R2 Feature Release Note: Article Translation with AI

Apply Base Article Content Changes to a Translated Article Version

Prerequisites

- Translate Articles with AI.
- Security:
  - *Manage: Help Articles View: Help Articles*, and *Self-Service: Help Articles* in the Help functional area.
  - *Drive* and *View Drive File and Media* in the System functional area.

Context

You can apply and translate content changes in a published base article to a translated article version.

Steps

1. Access the published base article from the Help Articles workspace or the View Article task.
   Ensure that the published article has the Base Article Version label.
2. Click Edit to access the article editor.
3. Add and review your content changes.
4. Click Publish to publish the changes.
5. In the Translation section, select Update from Base Article from the related action menu of a translated article version.
   Workday uses AI to translate and apply the content changes from the base article to your translated article version.
6. Review the translated content and click Publish.

Result

Workday now reflects the content changes in both the published base article and translated article version.

Related Information

Tasks

Translate Articles with AI on page 3051

Reference

2024R2 Feature Release Note: Article Translation with AI

Concept: Knowledge Management

Workday refers to knowledge management as the way in which you create, share, and manage knowledge. Workday enables you to capture, maintain, and share your HR knowledge through articles.

Article Formatting

You can create robust articles that include:

- Attachments
- Bulleted and numbered lists
- Different font sizes, font colors, and highlighted font
- External links
- Headings
- Images
- Links to internal tasks, reports, and articles
- Links to external URLs
- Paragraph formatting such as text alignment, line spacing, and indentations.
- Rich text formatting such as bold, italics, underline, and strikethrough.
- Tables
- Videos

Note: Article authors need security permissions for the tasks and reports that they want to link in the article.

Article Link Sharing

When you view an article, you can copy the article URL to share inside and outside of Workday. Example: You can link to an article in help text within a business process.

The security permissions that you configure still apply when sharing articles. Example: If Betty shares an article URL with Ryan, who isn't an audience member of the article, Workday displays an error instead of the article content.

Copying the URL also enables you to access the latest version of the article. When you copy the link directly from the web browser, the link doesn't work as the browser links change.

Article Collaboration

Article authors can share article drafts by adding other authors as article collaborators. When viewing a shared article draft, collaborators can also add comments on the draft. Article collaboration enables multiple authors to access, collaborate, and review new article drafts before publishing the draft.

Collaborators receive notifications in Workday when:

- An author adds them as a collaborator to an article draft.
- Other collaborators leave comments on shared drafts.

Article Feedback

You and your employees can help improve article content by letting authors know whether an article was helpful or not. You can leave a comment on articles that you find unhelpful. Workday sends a notification with the comment to the most recent author of that article version. Workday doesn't notify the original author or any other authors who might have edited the article.

Article Metrics and Reporting

You can view article usage details from the last 30 days, like:

- How helpful employees find an article.
- Feedback from employees.
- How many views an article receives.
- Median time employees spend reading an article.

You can access article metrics by selecting the:

- More button when you view a published article as an editor.
- *View Article Metrics* option from the ellipsis icon on each published article in the Help Article Workspace.

You can access these Workday-delivered reports:

Report Name	Description
Article Version Comments	The Article Version Comments advanced report displays comments for each article version.
Help Article Performance	The Help Article Performance advanced report displays article metrics for your entire knowledge base, enabling you to analyze your knowledge base and make data-driven improvements. This report displays article metrics for each individual published version of an article. Note: The Help Article Performance report refreshes daily, updating the Total Views, Helpfulness (%), and Article Version Feedback fields each day. The Article Version Feedback fields in the report only calculate and display metrics for negative feedback responses.

You can create custom reports to aggregate and view article metrics by using the Knowledge Base Article Versions report data source.

You can make a copy of the Workday-delivered Help Article discovery board to create and share a visual analysis of your knowledge base. You can create and share custom discovery boards by using the Knowledge Base Article Versions report data source.

From the Help Article Workspace, you can view the total number of views and Helpfulness (%) for all published versions of an article.

Article Summarization with AI

You can use generative AI in the article editor to summarize new or existing article content into:

- A general summary article with Overview, Key Takeaways, Call to Action sections. The Key Takeaways section displays content in a numbered list.

- A talking points for managers article with Summary, Key Talking Points for Managers, and Call to Action sections. The Key Talking Points for Managers section displays content in a numbered list.
- A frequently asked questions article with Introduction and FAQ sections. The FAQ section displays content in a question and answer format.

The Restructure with AI option in the article editor enables you to summarize your existing article content. The Generate Content option in the article editor enables you to select a DOCX or PDF file from your desktop or Drive and create a new summary of the content in the file.

Note: When you use theGenerate Content option to upload and summarize a file, Workday automatically attaches the source document and displays it in an additional Source Document section.

Article Translation with AI

You can use generative AI in the article editor to translate your article content into a different language.

From an initial base article, you can create and publish translated versions of the article by using the Add Translation button in the Translations section in the side panel. For each article translation, Workday automatically creates a new version of the base article.

When accessing a published base article in the Help Articles workspace, you can view each corresponding translated article version in the Translations section. You can use the Update from Base Article option to apply and translate content changes from a published base article to a translated article version.

The supported languages for translations are:

- Bulgarian
- Czech
- Danish
- Dutch
- English
- Estonian
- Finnish
- French (Canada)
- French (France)
- German
- Greek
- Hungarian
- Indonesian
- Italian
- Japanese
- Korean
- Latvian
- Norwegian
- Polish
- Portuguese (Brazil)
- Romanian
- Russian
- Simplified Chinese
- Spanish (Neutral)
- Swedish
- Turkish
- Ukrainian

Media in Articles

You can add these types of media to an article:

Media	Description
File	Displays as an attachment that viewers must download to view. Articles support these file types for attachment: • bmp • csv • doc • gif • jpeg • pdf • png • ppt • pptx • xlsx
Image	Displays in the article using the sizing settings you configured.
Video	Displays as an embedded video that viewers can watch directly in the article.

Related Articles

Workday uses the content of an article to search for and associate other related articles. Based on those associations, Workday displays up to 3 related articles at the bottom of an article.

While you can't manually designate which articles relate to each other, you can hyperlink to articles within an article body to promote visibility.

Related Information

Reference

24R1 What's New: Help Article Commenting

Glossary

Full Glossary of Terms

A	B	C	D	E	F	G	H	I	J	K	L	M
N	O	P	Q	R	S	T	U	V	W	X	Y	Z

Was this helpful?

A

Academic Date Range	The period of time associated with a student recruiting cycle.
Academic Level	The level of an educational objective that a student can pursue at an institution, such as:

- Undergraduate, Graduate, or Professional at a university.
- Associates or Baccalaureate at a community college.

Academic Unit	A Workday organization type that represents a school, college, university, or other unit of your institution. These units can recruit prospective students, admit students, offer programs of study or courses, or administer financial aid. Academic units are also used with academic appointments in Workday.
Academic Unit Hierarchy	A hierarchical grouping of academic units primarily used for roll-up reporting.
Accounting Cash	A group of cash ledger accounts that you can use to check cash balances against during settlement.
Accounting Cash Pool	One or more primary balancing worktag hierarchies that you can use to pool cash ledger balances for cash balance checks during settlement.
Active Candidate	A person with an application for a specific job requisition. Candidates must be linked to a job requisition for Workday to initiate a job application event.
All Ledgers Journal	An accounting journal that's not configured as a single ledger for the given company and is posted to both primary and alternate ledgers.
Applicant Pool	A subset of applications in an application grouping. Applicant pools enable you to control and adjust workload for application reviewers.
Application Grouping	A grouping of applications for the same admitting level of an academic unit and the same anticipated start date. Groupings can have 1 or more application pools, with an admissions counselor assigned to each pool.
Auto-fill	A time entry option that copies time blocks from a worker's schedule or from a previous week when entering time.
Award	A contract agreement with your sponsor in the form of funding to perform an activity for a public purpose. It defines how to capture direct and facilities and administration costs, recognize revenue, and bill your sponsor.
Award Costs Processing (ACP)	Processing facilities and administration costs and revenue recognition related to spend transactions on awards.
Award Credits	Percentage of award or award lines you allocate to specific worktags for reporting purposes.
Award Line	A line of authorized amount associated with a grant on an award. It includes information on the line's effective date, spend restrictions, basis limit, salary

	cap, and facilities and administration cost rates for expenditures charged to the grant.
Award Tasks	Administrative tasks that you do or track for a sponsor to support the terms of your award contract. Example: Quarterly progress report, financial report.
Aggregation Security Group	A security group that grants access rights to members of an included set of security groups. Revokes access of members of any excluded security groups.
Approve	An action in a business process that designated participants select to progress the event to the next step.
Assignable Roles	Positions you can assign to organization roles.

Back to Top

B

Basis Limit	The maximum amount of direct costs you can use to calculate facilities and administration costs.
Base Pay Element	The compensation components that are included in the calculation of base pay for the purposes of determining the compa-ratio and target penetration. Example: Include both base pay and bonuses in the base pay calculation for compa-ratio.
Benefit Credit Bundle	A defined group of benefit credits that you can award together.
Benefit Defaulting Rule	A rule that identifies the benefit plans, coverage targets, and coverage amounts that employees receive by default when they do not complete an enrollment event.
Benefit Event Rules	These rules specify coverage increase limits, EOI requirements, waiting periods, and other rules and conditions of enrollment for benefits enrollment events.
Benefit Event Type	Identifies the events that trigger benefit enrollment, such as open enrollment, new hires, or the birth of a child. It also identifies the coverage types to make available to employees for when an event of this type occurs.
Benefit Group	A group of employees who qualify for benefits based on eligibility rules. Employees must be included in a benefit group to enroll in a benefit plan.
Business Object	Objects used to store data in Workday (such as organizations or workers). A business object has *fields* and *instances*, which are analogous to rows

	and columns in a spreadsheet. Workday links related business objects: a worker is associated with a position, the position to a job profile, and so on.
Business Process Definition	The tasks that compose a business process, the order in which they must be done, and who can do them.
Business Process Instance	A business process that the initiator has started. The *Hire Employee for Organization X* business process definition becomes an instance when the initiator uses it to hire an employee.
Business Process Security Policy	A business process security policy secures the steps and process-wide actions including view, rescind, cancel and correct. It specifies which security groups have access to each action.

Back to Top

C

Calculated Time	Result of applying time calculations to a worker's reported time. Automates application of company or regulatory rules.
Calendar-Based Time Entry	A time entry method that uses the time entry calendar as the focal point for entering, editing, and submitting time.
Cancel (business process)	Canceling a business process stops the workflow in progress and reverses changes made to data. You can't cancel a completed business process; you must rescind it. A securable action in a business process security policy.
Candidate	Candidates include both prospects and active candidates.
Candidate Pipeline	All active candidates.
Candidate Pool	Candidates grouped together based on specific criteria.
Cascading Leave	A sequence of related leave types that are linked together. When an employee meets the conditions defined for ending a leave, Workday generates a return from leave request and a separate request for the next leave.
Company	Companies are organizations within Workday that represent the internal business entities within your enterprise. In Workday Financial Management, companies are the primary organization for all business processes. A Company is considered the level at which one holds a balanced set of books and should reflect Legal Entities where possible.
Company Hierarchy	Defines a parent-child or reporting relationship between Companies in your organizations. The way that you structure your hierarchies influences

	many important Workday functions, especially role assignments, planning, and reporting.
Compensation Basis	A grouping of compensation components, such as salary, commission, and allowance plans, that define estimated earnings for an employee population.
Compensation Component	The umbrella term for compensation packages, grades, grade profiles, and plans that can be associated with compensation eligibility rules.
Compensation Defaulting Rule	A rule that establishes the criteria for how compensation components default to worker compensation during staffing transactions (such as hire or job change).
Compensation Element	Compensation elements link Compensation to Payroll. When a compensation element is attached to a plan that is assigned to an employee, Workday can determine which earnings to use to pay the employee.
Compensation Package	A grouping of compensation guidelines (grades, grade profiles, and their associated steps) and plans that you can assign to workers as a set. Packages provide a quick view of the eligible plans for a particular job or group of employees.
Compensation Rule	Guidelines for determining which workers are eligible for which components of compensation.
Compensation Step	A specific monetary amount within a grade or grade profile.
Compensation Target Rule	A rule used to segment your employee population for assignment of compensation plans.
Conditional Calculation	Time calculation that tags time blocks that meet certain conditions.
Conditions	Conditions are one or more logical matches that are resolved to True or False and used to decide if some action should be taken. You can add conditions to steps in a business process to determine if the step should run.
Connection Map	A tool on a customer profile that enables you to establish and manage the relationships between business entities and ship-to addresses.
Connector	A set of 1 or more integration templates that provide a framework for building integrations in a particular functional area. The integration can support a specific type of data, or can support a specific endpoint (example: Salesforce.com or Okta).
Consolidated Billing Schedule	A billing schedule type that allows you to combine all charges for multiple projects or services within a specific billing period into one invoice.
Contextual Custom Report	A custom report created from the related actions menu of a Workday object by selecting Reporting

	> Create Custom Report from Here. Simplifies choices of data and fields to those related to the context of the object.
Contract Rate Sheet	A document that outlines the contract billing hourly rates for roles such as the engineer, manager, or consultant, with the option to add billing rules for specific contract considerations.
Conversation Tag	A descriptor, such as Dietary Restrictions or Special Needs that you can assign to an engagement conversation to identify its topic. You can search for conversations by conversation tag.
Conversation Topic	A conversation tag or recruiting event name that you can associate with an engagement conversation to make conversations easier to find.
Correct (business process)	Correcting a business process changes a specification or data in the workflow while in progress. A securable action in a business process security policy.
Cost Reimbursable Spend	A billing item that Workday creates to help you bill your sponsor for award-related spending. The cost reimbursable spend amount includes both the original spend amount and any overhead costs Workday calculates based on your award costs configurations.
Coverage Target	Defines whether a specific health care plan or insurance plan applies only to the employee or also to the dependents, spouse, family, and so on.
Cross Plan Dependency	Limits the coverage options available to workers during an enrollment event based on their choice of other benefit plans and coverage amounts. Example: You can limit coverage in a specific plan to a percentage of the total coverage in 1 or more other benefit plans.
Custom Report	Reports not delivered by Workday and built using the Workday Report Writer. Can be created new or by copying another standard or custom report.
Customer Payment Matching	A feature that uses historical payment applications to suggest customer invoices and adjustments that match customer payments with insufficient remittance advice.
Customer Refund Payments in Settlement Runs	A refund payment generated by the settlement run with a payment date that reflects the date you settle the refund.

Back to Top

D

Dashboard (landing pages)	A specialized landing page containing a set of pre-configured worklets for a functional area that you

	can copy or modify. You can add additional custom worklets to dashboards using the report writer.
Data Source	A data source defines a set of business object instances for reporting purposes. Allows reporting access to all business objects related to those in the data source.
Day Breaker	The time of day on which a worker's work day and work week begins. Defines the 24-hour period over which daily time calculations execute and the 168-hour period over which weekly time calculations execute. Unless otherwise specified, the default day breaker is 12am.
Deny (business process)	When you deny a business process, the business process is terminated and all Workday data is restored to its state before the business process started. To restart the business process, you need to submit the process again, and redo all previously completed steps.
Depreciation Profile	A configuration that determines how Workday depreciates assets by defining a depreciation method, convention, and useful life.
Designation	An attribute, such as Community Learning Partner, Honors, or STEM, that you can associate with educational institutions and external associations to make them easy to find and report on.
Discrete Composite Asset	A combination of related but distinct assets for which you can individually track cost, depreciation, and lifecycle events.
Disposition	Status of candidates that have been rejected for hire or declined a job during the job application event.
Domain	A collection of related securable items such as actions, reports, report data, report data sources, or custom report fields. Each domain is secured by a domain security policy.
Domain Security Policy	A collection of related securable elements of different types and user-specified security groups that have access to elements of each type.
Dynamic Period	A date that identifies the anticipated start date for a student of online education or other asynchronous learning.

Back to Top

E

Educational Taxonomy	A taxonomy scheme and set of codes you can assign to programs of study and their concentrations to meet state, local, or other classification requirements.

Effort Grant	The sponsor funded grant associated with the worker's certified effort.
Effort Recertification	The process you use to recertify an employee's effort in response to payroll accounting changes that occur after you last certified the effort.
Eligible Investigator	A type of role that you can use to assign individuals to awards, grants, and grant hierarchies, so that the role assignments remain intact even when the person's position or organization changes.
Engagement Action Item	Defines a requirement that must be met for an application for admission to be considered complete. Example: Submit transcripts.
Engagement Item	An engagement email or printed engagement item. You can include engagement items in engagement plans and use them to support student recruiting events.
Enrollment Event Rule	A rule that defines coverage start and end dates, waiting periods, coverage increase limits, Evidence of Insurability requirements, and other coverage rules and conditions. Rules ensure that the benefits process presents only the options that each employee is eligible for based on the event type.
Enterprise Interface Builder (EIB)	An integration tool that enables you to create simple, secure, and customizable integrations with Workday. Alternately, an EIB is a simple integration created by the integration tool. An EIB consists of an integration system, an integration data source, an integration transformation, and an integration transport protocol.
Estimate at Completion (EAC)	Includes all the hours logged and approved for the project, as well as the future hours the worker expects to complete.
Estimate to Completion (ETC)	Includes the future hours the worker expects to complete.
Event	A business process transaction that occurs within your organization, such as hiring or terminating an employee.
External Association	A nonprofit, community-based, or other noneducational organization that you can associate with student prospects or identify as a location for recruiting events.
External Engagement Item	Used to send and track third-party engagement items for recruiting events, communication plans, or ad hoc communications.

Back to Top

F

Fast Path	A streamlined approach to moving applications for admission from submission to matriculation as quickly as possible.
Field Overrides	A tool that lets you customize integration systems that are based on a connector template. Field overrides are managed through an integration service. They use calculated fields or report fields to supply values to an integration system. Example: member IDs in benefit provider integrations.
Financial Aid Period Record	A record containing data such as academic unit, academic level, and program of study for a student that Workday uses to process financial aid for an academic period.
Functional Area	A collection of domain or business process security policies that are related to the same set of product features, for example, Benefits or Compensation.

Back to Top

G

Grade Profile	A breakdown of a compensation grade by functional task, geographical region, or other categorization your business requires. A profile enables you to assign more granular compensation ranges to workers.
Grant	A worktag you use to charge award-related expenditures to an award line.

Back to Top

H

Headcount Plan	Provides visibility into the number of workers necessary to achieve your business goals within a specified period of time.

Back to Top

I

Individual Target	An individual bonus or merit target for a worker during a compensation review process that overrides the target defined on the compensation plan.
Integration Attribute	An integration component that specifies the tenanted value of a data element in Workday. Example: Plan Sponsor Name is a type of attribute in benefit provider integrations.
Integration Data Source	Indicates the type of data that Workday receives from or exports to an external system and its location.

Integration Event	The record of an integration process. Every integration—current or past, involving the import or export of data, successful or not—gets recorded as an integration event. The integration event contains all the information about the integration process, including its status.
Integration Map	An integration component that specifies how values in Workday map to values in an external system. Example: Pay Rate Frequency is a type of map in third-party payroll integrations.
Integration Service	A group of related integration attributes, maps, and XSLT that provides a framework to transform Workday data into the format required by an external system.
Integration System	A tenanted definition of an integration between Workday and an external system based on a template that provides the methodology for communicating data.
Integration Template	A collection of integration services that enables communication between Workday and an external system. Workday provides integration templates in categories such as Benefits, Financials, HCM, Payroll, Payroll Interface, Procurement, Recruiting, Security, and Settlement. Many of the delivered templates contain default values for attributes, as well as prompt values for attributes and maps, to define the integration further.
Integration Transformation	Converts data into a format that Workday or a receiving external system can understand. Workday provides some delivered transformations, and you can also create custom transformations.
Integration Transport Protocol	Controls how Workday exports data to an external endpoint or service or imports the data from an external endpoint or service. Workday supports several types of transport protocols, including email, FTP and SFTP, HTTP/SSL, Workday attachments, and Workday Web Services.
Intersection Security Group	A security group whose members are other security groups. Members associated with all included security groups are granted access through an intersection security group.
Initiation Step	The first step of a business process.

Back to Top

J

Job-Based Security Group	A security group that includes one or more job-related attributes or objects including job profile, job family, job category, management level, or exempt/non-exempt status.

Job Management Staffing Model	A structure that defines 1 set of hiring restrictions for all jobs in a supervisory organization, with no specific limits on the number of jobs that can be filled.
Job Profile	The generic features and characteristics of a job or position, such as management level, pay rate type, compensation, skills, and other qualifications.

Back to Top

K

Knowledge Article	An article that is accessible to workers in your organization based on the assigned article audience. You can use these articles to document, share, and manage HR information specific to your organization.
Knowledge Article Audience	A group of employees that can view designated Knowledge articles. Their access to articles is determined by condition rules assigned to the audience.

Back to Top

L

Landing Page	Landing pages display a collection of worklets. Landing pages may have different display formats (grid or bubble) and support different functions. The Home landing page is intended for common worklets, such as self-service worklets.
Leave Family	A set of similar leave of absence types. Example: A company-specific family includes disability leave and bereavement leave, while a separate regulatory family includes jury duty and family medical leave.
Leave of Absence Rule	A rule that defines worker eligibility for leaves of absence.
Line Tax Rate Application (LTRA)	A collection of tax amounts that apply to a given transaction line or supplier invoice line split on a taxable document.
Linked Customer Contracts	Child customer contracts that you associate with a parent customer contract for revenue allocation purposes.
Linked Leave	A leave type that shares an entitlement with other leave types or time offs. Eligibility rules, validation rules, and supporting data reference the combined balance of the associated leave types and time offs. Also known as coordinated leaves and time off.
Location Membership Security Group	A security group whose members are any workers assigned to that location.

Back to Top

M

Match and Merge	A process that helps eliminate duplicate student prospect information in Workday.
Micro-edit	The ability to edit existing time blocks or add time blocks directly to a day by clicking the time entry calendar.
Multiplier-Based Coverage	Insurance coverage based on multiples of salary, such as 1x, 2x, or 3x salary.

Back to Top

N

Nonbillable	A nonbillable project is an internal project that you don't invoice customers for.

Back to Top

O

Object Class	The spend categories that award sponsors agree to reimburse award recipients for maintaining their projects.
On-Account Document	A document that's generated when you place a payment amount on an existing customer account. You can apply on-account documents to future payments.
Organization Security Group	A security group whose members are any workers assigned to that organization.

Back to Top

P

Parent Customer Contract	A customer contract that you associate with a child customer contract so you can add contract lines across contracts to the same schedule. When you view the parent customer contract, Workday displays the child customer contracts as linked contracts.
Passive Event	Events that result from the passage of time rather than from a specific change to employee data.
Payment Group	The payments that result from a settlement run.
Payment Tax Rate Application (PTRA)	A collection of tax amounts that apply to a given payment on a taxable document.
Position Management Staffing Model	A structure that defines different staffing rules and restrictions for each position in an organization.
Position Restrictions	The attributes and conditions that apply to an unfilled position in a supervisory organization that uses the position management staffing model. Example: Job profile, location, qualifications, and worker type.

Pre-Hire	In Staffing, an individual you're tracking before employment. In Recruiting, a candidate who is in the *Offer*, *Employment Agreement*, *Background Check*, or *Ready for Hire* stage.
Procurement Contract	Contracts enable your organization to define preferred suppliers, analyze spend for better control, and standardization. They also allow your organization to implement contractual spend to better negotiate and enforce discounts and other supplier terms.
Procurement Contract Type	A procurement contract in Workday is always associated with a Contract Type that dictates how the contract can be used across the procure-to-pay chain. Example: when a Contract Type has the Scheduled Purchase Orders option set, Workday can use the contract to automatically create purchase orders based on a predefined schedule.
Pro Forma Effort Certification	A report you can run before you run effort certification to review estimated effort based on salaries and wages that payroll accounting attributes to grants. It allows you to take corrective action, such as payroll accounting adjustments, prior to certifying employee effort, to ensure a more seamless certification process.
Project Advanced Labor Costing	Prorating project labor costs using standard or fully burdened costing.
Project Asset	A container that captures separate, ongoing costs of a capital project in progress. You can associate multiple projects assets with a project to track costs over the life of a project.
Project Billing Rate Sheet	A document that outlines the hourly or daily rates charged per project role, with the option to be more specific based on defined categories such as Region, Skill Level, and Project Size.
Project Plan Phase	A phase in the project plan that represents a stage in the project work. Example: Plan and Strategize. A project plan organizes projects into sequenced phases and tasks. A project phase is generally project agnostic, but when you add that phase into a project plan, it becomes a project plan phase.
Project Plan Task	The work details in a project plan phase. Example: Define Project Objectives.
Project Transaction Source	The source of project billing transactions. Example: Supplier Invoice, Expense, or Time.
Prospect	Someone you are interested in tracking who isn't associated with a specific job. You can use tags, prospect types, and prospect statuses to help track these individuals.

Back to Top

Q

Quick Add	A time entry option that enables you to create a time block and copy it to multiple days in a week.

Back to Top

R

Recipient Threshold	The maximum number of prospects to whom you can send an engagement item at the same time without requiring approval.
Recruiting Cycle	A recruiting period for 1 or more academic levels of an academic unit. You associate recruiting cycles with campaigns to measure the effectiveness of each campaign per recruiting cycle.
Reference ID	A unique identifier used to look up data for integration purposes.
Reference Pay Range	A range of pay established for a compensation grade or grade profile.
Related Customer Contract	A customer contract that you associate with another customer contract for reporting purposes. When you create a customer contract, you can associate 1 related customer contract with it. The related customer contract must share the same company and sold-to customer.
Reported Time	A worker's time that has been entered, but has not had any time calculations applied.
Revenue Category	An attribute in customer contracts and billing used to search for and report on goods and services you sell. Also a dimension in account posting rule types for customer contracts, billing, and accounts receivable that drives accounting behavior.
Risk Insight	Provides the reason why Workday identifies an expense report with a High or Medium risk level. Reasons may include 1 or more of these: Amount Anomaly, Duplicate Expense, and Incorrect Expense Item.
Risk Level	The value (Low, Medium, and High) that Workday provides from risk evaluation. Workday provides default risk levels, which can also be configured based on Risk Score.
Risk Score	The numerical value (0 to 100) that Workday provides from risk evaluation. The score helps identify anomalous expense reports.

Back to Top

S

Salary Over the Cap Basis	A worktag type representing the effort grant on over-the-cap salaries when you have salary over the cap enabled on your tenant. For the portion of

	salary that's over the cap, the Salary Over the Cap Basis worktag identifies the effort grant, while the Grant worktag, if applied, identifies the grant on the salary over the cap suballocation.
Salary Over the Cap Suballocation	Worktags and their distribution percentages that you want to allocate on the portion of salary that's over the salary cap.
Single Ledger Journal	An accounting journal that's a single primary or alternate ledger currency for the given company.
Source	The duplicate record that you want to merge in the Duplicate Management Framework.
Spend Category	A logical grouping to search and report on acquired items and services. Also a dimension in account posting rules for procurement and spend that drives accounting behavior.
Staffing Model	A structure that defines how jobs and positions are created and filled in a supervisory organization. Workday supports 2 kinds of staffing models: • Job management. • Position Management.
Staffing Organization	An organization category that includes supervisory organizations, matrix organizations, or retiree organizations.
Stage	A value, such as Lead, Inquirer, or Applicant, that identifies where a student prospect is in the recruitment or admissions process.
Student Financials Period Record	A record containing data such as academic unit, academic level, and program of study for a student that Workday uses to process student financials transactions for an academic period.
Student Prospect Profile	A worklet that displays information for a prospective student, including contact information and recruitment details.
Student Prospect Type	A value, such as First Year or Adult Returning, that you can assign to prospective students and use to match student prospects to admissions counselors automatically.
Student Recruiting Region	Workday term for recruiting territory. A recruiting region can represent a geographical area, 1 or more schools, or schools in selected school districts.
Student Tags	An attribute, such as Veteran, Athlete, or Scholarship Recipient, that you can assign to student prospects. You can use tags to match student prospects to recruiters automatically, find prospects, and use as criteria for associating engagement plans with prospects.
Supplier Contract	Contracts enable your organization to define preferred suppliers, analyze spend for better

	control, and standardization. They also allow your organization to implement contractual spend to better negotiate and enforce discounts and other supplier terms.
Supplier Contract Type	A supplier contract in Workday is always associated with a Contract Type that dictates how the contract can be used across the procure-to-pay chain. Example: when a Contract Type has the Scheduled Purchase Orders option set, Workday can use the contract to automatically create purchase orders based on a predefined schedule.
System User	An account associated with and required to launch a Connector or Studio integration. Workday delivered integrations and custom integrations require a system user account for authentication and web service calls. A system user account is not associated with a person in Workday.
Staffing Organization	An organization category that includes supervisory organizations, matrix organizations, or retiree organizations.

Back to Top

T

Target	The record into which you want to merge the source in the Duplicate Management Framework.
Tax Code	A combination of tax rates that you select on transaction lines.
Tax Rate Application (TRA)	A collection of tax amounts across all lines on a taxable document with the same tax applicability, tax code, tax option, tax point date, tax rate, and tax recoverability.
Tax Recovery Pro Rata Factor Percentage	A company-specific percentage that modifies the tax recoverabilities that you configure for the tenant.
Termination Adjustment	A time off adjustment that automatically sets the remaining balance of a worker's time off plan to zero upon the worker's termination.
Time Block	A time block carries information about a portion of time, such as the number of hours worked or in/out times. Time blocks can be reported or calculated, but only calculated time blocks are pulled into Workday Payroll.
Time Calculation	A set of rules to apply time calculation tags to calculated time blocks for Payroll or other purposes. Example: You could create a time calculation to convert regular hours into overtime hours automatically if a worker works more than 40 hours in a week.
Time Calculation Tag	Workday applies calculation tags to time blocks during time calculations. The tags map to payroll

	earnings to drive how time blocks are paid and can be included in time off and accrual calculations. You can also use them to display time and time off totals on the time entry calendar.
Time Clock Event	A time clock event describes a worker's actions, such as a check-in or check-out, on the web time clock or an external time clock. Workday matches time clock events to form time blocks, which workers can edit and submit.
Time Code Group	The primary use of a time code group is to determine which time entry codes a worker is eligible for. Time code groups are assigned to a worker or to a position through eligibility rules.
Time Entry Calendar	A set of self-service pages that workers use to enter, edit, and submit time, when using calendar-based time entry. When using high volume time entry, workers can view and submit time from the time entry calendar.
Time Entry Code	A time entry code describes the type of time a worker enters, such as worked time or meal allowance. To use time entry codes, you must attach them to time code groups, except for the default time entry code assigned to a time entry template.
Time Entry Template	A template defines how a worker's time entry calendar is configured. Workers are matched to time entry templates through eligibility rules.
Time Entry Validation	Errors or warnings that prevent users from entering invalid time. Critical validations prevent a user from submitting time. Warnings display when entering time but don't prevent the worker from submitting time.
Time Off	The rules that apply to a specific type of time off, including eligibility rules, whether adjustments are allowed, and limits that differ from the time off plan.
Time Off Plan	The rules for entering and tracking 1 or more related time offs. Identifies the unit of time, eligibility requirements, whether to track balances, and if time offs are position-based or worker-based.
Time Period Schedule	A time period schedule defines which dates are available for entry at a given time and defines which dates are paid in which pay periods. They can line up with pay periods, or, in more complex scenarios, they can be paid on a lag.
Time Proration Rule	A rule that prorates employees' target compensation in a bonus or merit increase compensation event according to time-based criteria, such as leave of absence or time since hire.

Time Shift	A grouping of consecutive time blocks that you can use in standard overtime calculations, time block conditional calculations, and validations.

Back to Top

U

Unbillable	An unbillable transaction is a billing transaction that has an issue preventing it from being billed. You can't take action on the transaction until you resolve the issue.
Unnamed Resources	Placeholders for project resources that you can use to assign tasks and perform resource forecasting without specific resource assignments.

Back to Top

V

Value-Based Project	A customer contract line type that you use when your project billing installment values are not known at the time of contract creation.

Back to Top

W

Wave Picking	Enables you to group picking lists together in groups to better organize and prioritize your inventory picking process
Week Breaker	The day of the week on which a worker's work week begins. Defines the 7-day period over which weekly time calculations execute. Unless otherwise specified, the default week breaker is Sunday at 12am.
Work Schedule Calendar	A calendar that defines the days and hours that a worker is scheduled to work. In Time Tracking, work schedule calendars affect time entry options, calendar displays, and time calculations.
Workday Studio	An Eclipse-based development environment that enables you to build more complex integrations with Workday.
Workday Web Services	Workday's public API. Based on open standards, Workday Web Services (WWS) provide the core method for integration with Workday.
Worker	An employee or a contingent worker.
Worklets	Mini applications represented by clickable icons in Workday, providing quick and easy access to tasks and data that you access regularly. Example: the Inventory or Time Off worklets, or a worklet based on a report.

Back to Top

X

No Entries

Back to Top

Y

No Entries

Back to Top

Z

Zone Picking	A method of picking for orders from different zones at an inventory site. In Workday, you can split a stock request into multiple zone picking lists for more efficient picking and shipping. You can then ship the zone picking lists separately or merge them before shipment.

Back to Top