

Workday Housekeeping duties

Absence

- Send notifications to managers to approve time-off requests for current year before 12/31. We have increases effective 1/1 and have noticed that WD will pay the employee at the "old rate" when time-off requests are approved after the 1st of the year for prior period time-off
- Update Absence Plans using specific (hidden) dates (Winter Break, Voting Time off, etc.)
- Update Absence period schedules for new year
- Update holiday calendars for new year
- Update BP validation rules using dates (we have rules on our BP: Request Time-Off that limit the dates the time-off type can be requested)
 - BP: Request Time Off
 - BP: Correct Time Off

Benefits

- Update union rates (health, pension, legal, training, dues, etc.)
- Finalized Open Benefits Events that have expired (past the enrollment period)

Reporting & Auditing

- If using Position Management, run reports to validate aging items
 - Empty Positions without Job Requisition
 - Positions with Job Requisitions (if unfilled, are they still needed?)
 - Empty Organizations (Sup Orgs or Cost Centers)
- Create the Business Process Definitions Report.
- Review & update help text if needed. Configuration for report is attached.
- Review Integrations custom reports & transfer reports owned by terminated employees
- Review notifications on integration events and remove/replace terminated workers
- Run Custom Report Exceptions by Owner
 - Transfer reports owned by terminated employees
 - Delete reports if not used recently
 - Clean up any issues that show up on this report
- Run calculated field exception audit & fix issues
- Finalized Open Benefits Events that have expired (past the enrollment period)
- Update union rates (health, pension, legal, training, dues, etc.)
- Mass Update Report tags on reports that are missing tags

System

- Update Scheduled Future Processes to run through end of next year (Mass Update Scheduled Future Processes task)
- Mass advance BPs awaiting action by terminated workers (Review Docs, Hire, Benefits, To Dos, Performance, etc.)
- Review User-Based security groups and remove EEs that do not need access
- Check external links on Workday profile shortcuts drop down menu
- Update Quicklinks
- Check Ledger periods
- Review Cost Centers (Update account posting rules, custom reports, and/or worker costing allocations)
- Check the FLSA work periods calendar
- Run the Business Process Transactions Awaiting Action for X Days report. Use the Mass Advance Business Process task to clean-up any over 365 days.
 - Start Add Job
 - Job Requisitions
 - Interview, Post Job
 - Internal Candidate, Review Candidate, Screen Candidate
 - Hire
 - Contact Change & Legal Name Change
 - Performance Reviews, Get Feedback, Manage Goals
 - Wage Theft Notice
 - Benefits events (Change Benefits, EOI, tasks abandoned by employees)