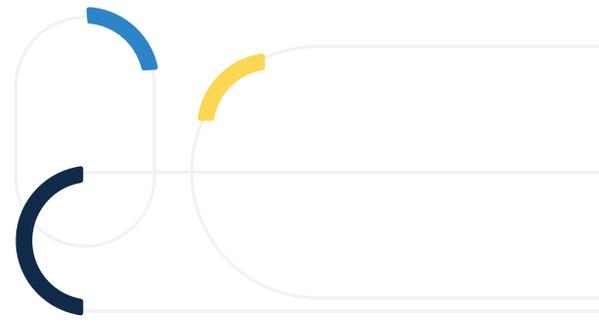


# Melt the Mayhem

Cincinnati RUG





# Meet the Presenters



**Sean Higgins**  
Senior Vice President,  
Development  
**Master of Festivities**



**Juan Araujo**  
Pineville, NC  
Everything HCM  
13 years in ecosystem



**Tim Tanis**  
Columbus, OH  
Advanced Compensation  
20 yrs in corporate & 50  
countries!



**Teresa Lemaitre**  
Colombia  
Recruiting, Talent &  
Performance  
10+ yrs hr & recruiting



**Santiago Ossa**  
Orlando, FL  
Recruiting, Security,  
Reporting, Prism  
curious mind, creative solutions



**Laura Johnson**  
Minnesota  
All WD Areas,  
Payroll Certified  
13 years in the ecosystem



**David Kang**  
White Plains, NY  
Absence Services  
dual citizen South Korea and  
United States



**Minerva Pedroza**  
Houston, TX  
Benefits  
10+ years in the ecosystem  
fell for running propaganda

Until the early 1600s tinsel was made from real silver!



## Who We Are

We're a team of Workday experts who know the challenges firsthand. We're a company built on trust, transparency, and genuine human connection.

### Global Presence

With teams based in The US and LATAM.

### Unique Training Model

Every consultant completes our proprietary HR and Finance training before stepping into client work — so conversations move beyond “nuts and bolts” into real business impact.

### Our philosophy

We don't just support systems; we build relationships.

**12+** years of Workday® architecture experience.

**30+** enterprise clients successfully supported.

 **INTEGRUM**

Built by Industry experts.  
Shaped by real experience.





## Our Concierge Approach

Because Support Should Feel Human



### Flexible Engagement

From 1 hour to 1000, no minimum commitment. Support that scales with your needs.



### Familiar Faces

Your team works with people they *know and trust* — no 24-hour time-zone handoffs, no strangers picking up cases.

## Our Differentiators



### Knowledge Transfer

Our goal is to make clients self-sufficient, not dependent. We share what we know, always.



### Nearshore Model

Our bilingual consultants are aligned with our clients' time zones



# Agenda

## 1:15 – 1:45

Because 'We'll fix it later' Never Ends Well: EEO Optimization

- Keep your New Year resolution, get your system in shape before reporting season.

## 1:45 – 2:30

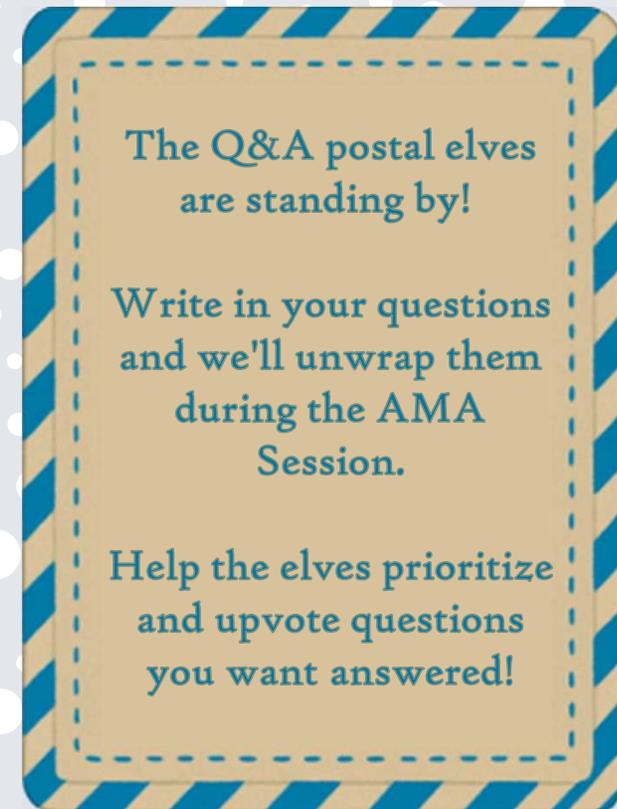
Sleigh the Year End (Closeout)

- We made the list, You check it twice

## 2:30 – 3:30

The Workday Whisperers: InTegrum AMA Session

- 'Tis the season of giving and our experts will fill your stocking with config knowledge





# Q&A

Hover your mouse over the screen for the options to appear at the bottom.

Select "More" and click on "Q&A"

Send us your questions: big, small or pure holiday chaos

🎁 Upvote your favorites so we know what to unwarp first! 🎁

- Record
- Transcript
- Captions
- Q&A**
- Docs
- Notes
- Whiteboard
- Apps
- Reset to default  
Drag to reorder toolbar

Audio Video Participants 4 Chat React Share AI Companion Meeting info **More** Leave



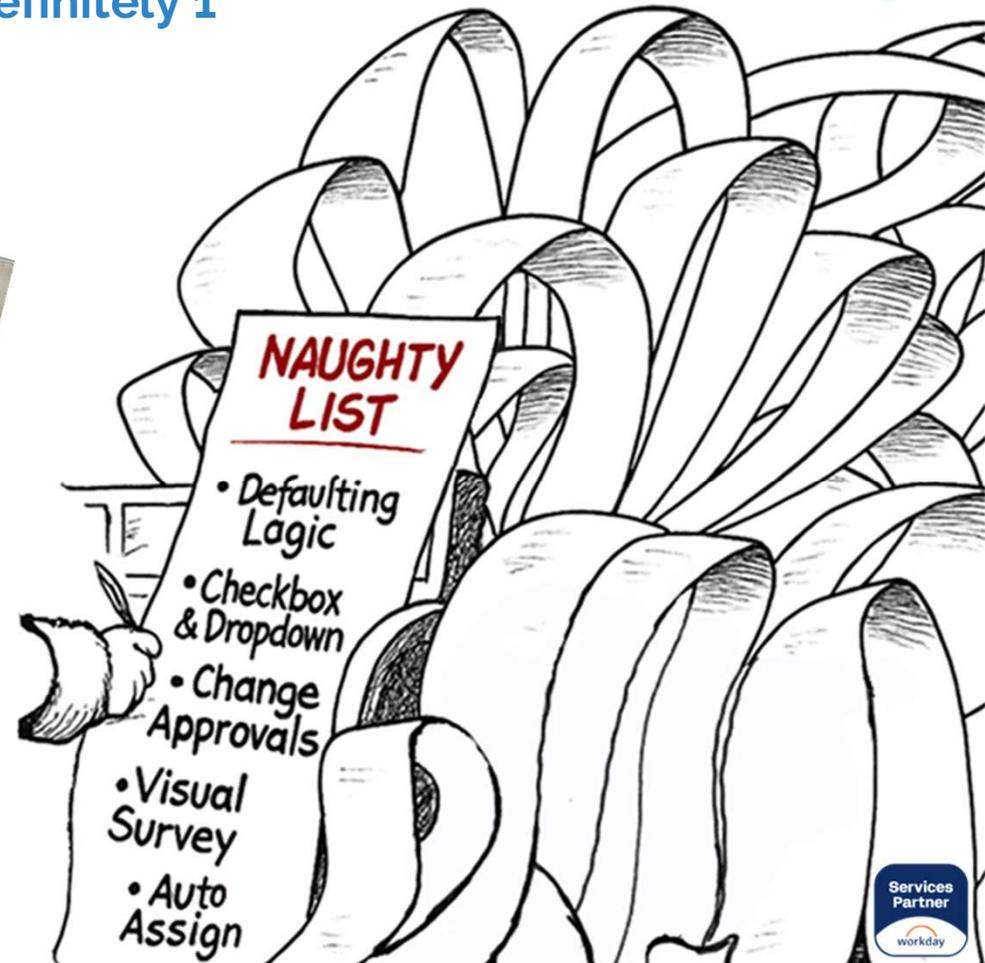


Because *'We'll fix it later'* Never Ends Well:

EEO Configuration Optimization



## Workday's Got 99 Problems and EEO is Definitely 1





☰ **Stuffing your stocking with joy!**





☰ Let's crack open this chestnut!

## Set Up Tasks

Edit Tenant Setup - Global

Maintain Localization Settings

Maintain Ethnicities

- Edit Tenant Set-up to allow for Multiple Ethnicities
- Maintain Localization Settings to map & Activate Race & Ethnicity to USA
- **Maintain Ethnicities task:** do not map to Hispanic/Latino

Race/Ethnicity

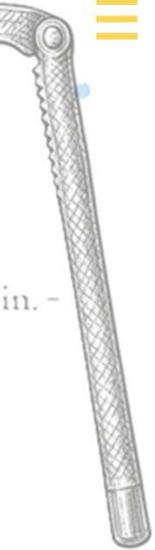
Hispanic or Latino

Race/Ethnicity

Search

- American Indian or Alaska Native (United States of America)
- Asian (United States of America)
- Black or African American (United States of America)
- I do not wish to answer, (United States of America)
- Native Hawaiian or Other Pacific Islander (United States of America)
- Two or More Races (United States of America)
- White (United States of America)

in. -



*Castanea sativa*





## ☰ Dashing through Job Profiles...

- Foundational to EEO = Updating Job Profile Classifications
- **Effective date** must be on or before start date of reporting period. IE: Oct 1<sup>st</sup>
- Review Job Profiles created Oct 1 – Dec 31
- **EIB to update everything at once!**

Job Classification Data+ (All > Job Profile Request Data)	
Required	Optional
Text	Job_Classification_Reference_ID
Row ID*	Job Classifications
1	EEO_1_5



View Job Classification Group		United States EEO-1	
Effective Date	11/06/2025		
Date of Last Change	04/02/2025 04:47:01.221 AM		
Job Classification Group Name	United States EEO-1		
Job Classification Group Mapping	United States - EEO		
Country / Country Region	United States of America		
Inactive	No		
Job Classifications 10 items			
Job Classific	Job Classification ID	Job Classification Description	Maps to
...	1.1	Executive/Senior Level Officials and Managers	1.1 Executive or Senior Level Officials and Managers
...	1.2	First/Mid-Level Officials and Managers	1.2 First or Mid Level Officials and Managers
...	2	Professionals	2 Professionals





## ☰ In a multi-Establishment sleigh...

### Assign Establishment

Hire

Change Job

Edit Position

Add Addition Job

- Add step to end of BPs
  - Make it required

### Auto Assign

Workday auto assigning for remote workers 🙅

Paraphrase: "Remote employee doesn't report to a physical location, they should be counted at their manager's EST. If neither report to an EST, include them in the Headquarter's report."

### EIB

Establishment - v44.1			
Area	All	Optional	Establishment Data
Restrictions	Required	Optional	Optional
Format	Text	Establishment_ID	Text
Fields	Spreadsheet Key*	Establishment	Establishment Num
	1		EN001
	2		EN002
	3		EN003
	4		EN004
	5		EN005

- Assign Remote Workers to HQ
- Custom Reports to identify EEs and Establishments
- Convert to EIB format & Upload



≡ Over BPs we go...

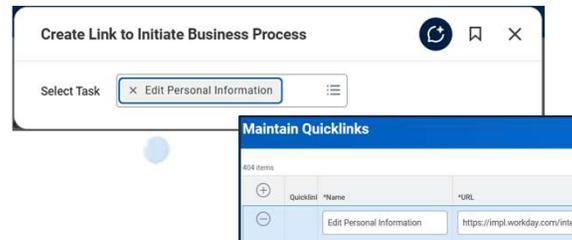


# Personal Information

And/Or	(	Source External Field or Condition Rule
And		<input checked="" type="checkbox"/> Gender - Proposed
Or		<input checked="" type="checkbox"/> Date of Birth - Proposed
Or	(	<input checked="" type="checkbox"/> Marital Status - Proposed
And		<input checked="" type="checkbox"/> Marital Status - Proposed
Or	(	<input checked="" type="checkbox"/> Marital Status Date - Proposed
And		<input checked="" type="checkbox"/> Marital Status Date - Current
Or	(	<input checked="" type="checkbox"/> Hispanic or Latino - Proposed
And	(	<input checked="" type="checkbox"/> Ethnicity - Proposed
And		<input checked="" type="checkbox"/> Hispanic or Latino - Proposed

- Enhance Step Conditions
- Set to trigger Visual Survey
- Add Validations to Require Fields

# Deep Link



Send email to Employees with blank selections using a **deep link**

- **Create Link to Initiate Business Process**
- Select Edit Personal Information task
- Save to **Maintain Quicklinks**

# Visual Survey

Domain Security Policy      Person Data: Ethnicity Visual Survey

Don't let visual survey figgy your pudding

- Control domain security
- Workday defaults to Employee selection over Visual Survey Results





## ≡ Building reports all the way!

- Workday's reports will provide data needed to submit
- Custom reports are the presents you want

## EEO-I Composite Report

**Surprise!** A report that outputs data formatted for the EEO website!

- "All Active Employee" data source
  - Control Field is "Establishment"
  - Fields must be in a specific order
  - Generate, convert & download
- We'd love to help you set this up!

Establishment	1.1 Executive or Senior Level Officials and Managers				
	A - Hispanic or Latino Males	B - Hispanic or Latino Females	C - White Males	F - Asian Males	H - Two or More Races Males
EN001 - HQ	0	0	0	0	0
EN002 - <Location>	0	0	0	0	0
EN004 - <Location>	0	0	0	0	0
EN005 - <Location>	0	0	0	0	0





# Knowledge Swag making spirits bright!

## Knowledge Swag:

- EEO-1 Readiness Aid
- Step Conditions and Validations cheat sheet



## EEO Ready

RELATED LINKS

- [EEO-1 Commissions Website](#)
- [EEO-1 Data Collection In](#)
- [2022 Additional FAQs](#)
- [North American Industry Bureau](#)

ESTABLISHMENT

- [Run Establishment Information Custom Report](#)
- [Create new & inactivate unneeded Establishment](#)
- [Maintain Establishment](#)
- [Assign Establishment To](#)
- [Integration: Put Establish](#)

ASSIGNMENT

- [Establishment Assignme](#)
- [Convert Changes to EIB](#)
- [Integration: Assign Estab](#)

### BP: Personal Information

#### Step Conditions

Approval Step:

- If the Initiator is anyone other than HR requires approval
- If the initiator is not a Current Assignee or Prior Approver requires approval
- Triggered from a BP that is not Onboarding requires approval
- Requires Approval only if race or ethnicity change (seen below)

#### Validations

Initiation Step:

- Date of Birth cannot be blank for identified Employee Types
- Gender is a required field for identified Employee Types
- Race/Ethnicity is a required field for identified Employee Types, and trigger visual survey if field/box is not specified

And/Or	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And	<input checked="" type="checkbox"/> Gender - Proposed	not in the selection list	Value from another field	<input checked="" type="checkbox"/> Gender - Current
Or	<input checked="" type="checkbox"/> Date of Birth - Proposed	not equal to	Value from another field	<input checked="" type="checkbox"/> Date of Birth - Current
Or	<input checked="" type="checkbox"/> Marital Status - Proposed	not in the selection list	Value from another field	<input checked="" type="checkbox"/> Marital Status - Current
And	<input checked="" type="checkbox"/> Marital Status - Proposed	is not empty	Value specified in this filter	
Or	<input checked="" type="checkbox"/> Marital Status Date - Proposed	not equal to	Value from another field	<input checked="" type="checkbox"/> Marital Status Date - Current
And	<input checked="" type="checkbox"/> Marital Status Date - Current	is not blank	Value specified in this filter	
Or	<input checked="" type="checkbox"/> Hispanic or Latino - Proposed	equal to	Value specified in this filter	No
And	<input checked="" type="checkbox"/> Ethnicity - Proposed	any in the selection list	Value specified in this filter	I do not wish to answer (United States of America)
And	<input checked="" type="checkbox"/> Hispanic or Latino - Proposed	equal to	Value specified in this filter	No





# *Sleigh the Year End* (CLOSEOUT)

**Integrum's secret recipe for closing strong and starting fresh.**





## ≡ A Dash of Collaboration

**Year-end isn't just about closing the books:**

It's about setting the table for next year's success. When Benefits, Payroll, and Finance blend their ingredients perfectly, we deliver accuracy, compliance, and confidence to every employee.

### **Ingredients for Success:**

- A spoonful of preparation
- A pinch of testing
- A whole lot of teamwork



**Bake early to avoid surprises in January!**



# ☰ Benefits: Stirring Up a Smooth Open Enrollment

**Before the payroll elves and finance bakers get to work, it all begins here, with Benefits.**



We blend a little planning, a dash of accuracy, and a spoonful of care to make sure every employees benefits are served just right.



When we mix eligibility, elections, and ACA tracking to perfection, everything else - from Payroll deductions to year-end reporting - comes out smooth.

## Target Completion:

- First week of October (ACA)
- Last week of December (General)

Here's what happens when we get the Benefits mix just right!





## ☰ Benefits: Step-by-Step Recipe

Before the Benefits dish goes into the oven, there's a checklist every good elf follows.

Each step helps ensure every ingredient (from eligibility to deductions) blends perfectly before year-end.

### Steps

1. Finalize Open Enrollment and confirm new-year plans.
2. Audit results and coverage accuracy.
3. Update ACA Measurement Periods and Eligibility Rules.
4. Communicate deduction changes to Payroll.
5. Validate ACA and plan data in sandbox before January.



# Benefits: Ready-to-Serve Tasks



The Benefits kitchen is open and it's time to serve up perfection!  
Before this dish hits the Payroll and Finance buffet, every ingredient must be checked, tested, and beautifully plated.

STEP	WHAT TO MIX	TOOL/REPORT
Finalize Open Enrollment	Confirm new-year results	Open Enrollment Event Audit
Validate Plan Rates	Review updated costs	Benefit Plan Rates Validation
Update ACA Periods	Configure next-year tracking	ACA Measurement Period Setup
Refresh Eligibility Rules	Align with new ACA periods	Benefit Eligibility Rule Maintenance
Confirm Carrier Integrations	Test data connections	Integration Audit
Communicate Payroll Deductions	Share updated premiums	Benefit Cost Report
Test in Sandbox	Validate in test tenant	Benefit Participation Audit

Because no one wants to find out their deductions didn't bake right after the year begins.



# Benefits: Holiday Prep Timetable



Even the best chefs follow a timeline, and Benefits is no different. Here's the perfect recipe calendar to keep every ingredient fresh and ready before year-end.

TASK	TIMING	WHY IT MATTERS
Close Open Enrollment and validate elections	Mid-November	Ensures elections match carrier confirmations.
Update benefit plan rates and eligibility rules	Mid-October	Prepares new-year plans and avoids contribution errors.
Review FSA/HSA carryover and reconcile YTD goals	Mid-December	Ensures compliance with IRS carryover limits.
Validate ACA eligibility and affordability calculations	Late December	Prepares ACA reporting for next year.
Test carrier integrations for the new year	Late November – Early December	Ensures file transfers succeed before carrier deadlines.

Timing is the secret ingredient to a flawless year-end.





# ≡ Payroll: Whipping Up W-2 Perfection

Payroll is where precision meets trust. One missing ingredient can throw off the whole recipe, but with careful timing and testing, the result is a flawless W-2 season.

## Target Completion:

- First week of December (calendars & schedules)
- Last week of December (W-2s)



**PAYROLL**

- ✦ Accurate tax data = confident employees
- ✦ Clean ledgers for Finance handoff
- ✦ Zero rework come January



★ Payroll: Year End Checklist ★		
STEP	DESCRIPTION	REPORT/ACTION
Validate W-2 Mappings	Verify boxes, codes, and retirement plan data	W-2 Audit
Fix Invalid Data	SSN, address, or YTD negatives	Error Report
Test W-2s	Sandbox printing and data verification	Preview Reports
Publish to ESS	Post-approval employee access	Publish W-2 Task
Maintain FLSA Calendar	Build out calendars for the next year	FLSA Work Period Setup



Test early, test often. A watched W-2 never burns.





Payroll: Holiday Prep Timetable		
TASK	TIMING	WHY IT MATTERS
Validate W-2 Mappings	Mid-November	Ensures box codes and retirement plan data align before testing.
Fix Invalid Data	Late November	Prevents errors when generating final W-2s.
Test W-2s in Sandbox	Early December	Identifies data issues and formatting mismatches early.
Publish to ESS	Last week of December	Guarantees employee access before year-end cutoff.
Maintain FLSA Work Period Calendar	Last week of December	Ensures overtime calculations remain accurate through next year.



A perfectly timed Payroll keeps the year-end cake from collapsing



# Finance: The Final Glaze



The Finance kitchen brings it all together, balancing ledgers, closing journals, and making sure every crumb adds up before the year wraps

## Target Completion:

- Last week of December - all Finance year-end close actions

## Why it matters:

- No blocked postings in January
- Ready ledgers for the new fiscal year
  - Smooth reporting handoff



# YEAR END BAKE STEPS

AREA	Key Tasks
 Procurement	Approve/source requisitions Close POs Create receipt accruals
 Supplier Accounts	Complete open invoices Amortize prepaids Reconcile AP subledger to GL
 Customer Accounts	Apply payments Complete invoices Run revenue recognition Reconcile AR to GL
 Inventory	Complete put-aways, receipts, transfers Ship or cancel drafts
 Assets	Capitalize assets Record depreciation Reconcile Asset Subledger



# Roll Forward & Year-End Tasks

AREA	ACTION
Ledger Management	Create next fiscal year Open next period Run revaluation & allocations
Banking	Complete bank reconciliation Reconciliation reporting
Accounting	Roll forward year-end balances
Journal Insights	Enable AI journal review to flag anomalies early
Process Groups	Use close-by-area groups to accelerate financial close



# Don't Burn your Biscuits

Even the best chefs make mistakes, here's what to keep off your holiday menu:

- Fiscal schedules missing future years
- Period schedules not extended for new year
- Unpublished W-2s or outdated print templates
- ACA periods not updated before Open Enrollment
- Unvalidated recurring journals blocking postings



Avoid burnt edges, keep your process golden





# *The Workday Whisperers:* Integrum AMA Session





# Meet the Presenters



**Sean Higgins**  
Senior Vice President,  
Development  
**Master of Festivities**



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Everything HCM  
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Recruiting, Talent &  
Performance  
10+ yrs hr & recruiting



**Santiago Ossa**  
Orlando, FL  
Recruiting, Security,  
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curious mind, creative solutions



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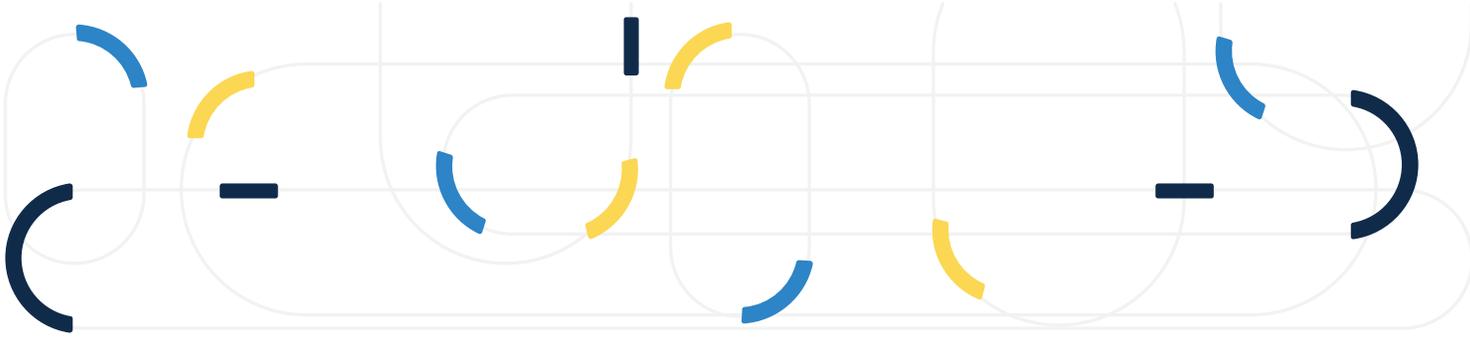
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Houston, TX  
Benefits  
10+ years in the ecosystem  
fell for running propaganda

Until the early 1600s tinsel was made from real silver!





# Thank you!

Contact us: Sean Higgins  
[shiggins@integrumresources.com](mailto:shiggins@integrumresources.com)

