Completed Date versus Effective Date

The *Completed Date* is the date the action was finished in Workday; or, in the case of actions with step delays the day after the effective date. See a list of actions with a step delay in the *Future Effective Dated Actions* section below. The *Effective Date* is the date the action is to begin or end. The effective date can be in the past or in the future. The completed date and effective date will not always be the same.

Retroactive Effective Dated Actions

An action is considered retroactive if the effective date is in a closed pay period. When changing information in Workday retroactively, you need to be aware of any business processes that have taken place on the worker after the effective date of your action, as well as any actions that are completed with a future date. Workday transactions are date driven and are not necessarily on-going, meaning that another transaction effective later, but entered before your transaction could interrupt your action. You will need to look at the Worker History to determine if the change you want to make in the past will carry forward uninterrupted. Other business processes may impede the continuation of the action, requiring multiple entries of the business process at subsequent dates in the timeline.

*Any retroactive change to compensation, union membership or leave accrual code will require the assistance of the Workday Helpdesk to complete an Ad Hoc or Refresh to Payroll.

		Move Worker 5/19/19	Employee moves to PERS AP Rate 6/1/19	COLA and Biennium change 7/1/19	
✛	Costing Change 4/1				
March	**April**	**May**	**June**	**July**	**August**

If today is August 7 and you want to add a costing allocation effective April 1 for a worker, review the worker history to determine what business processes have taken place since April 1 for the worker and what processes are in progress. You may not be able to retro this far back because of impacts on Payroll. The system may allow you to do the action, but may not feed to Payroll. If transactions have to be removed, rescinds may need to be managed by Workday Helpdesk staff. Any retroactive action that is not the most recent transaction may require a "Refresh" or "Ad hoc" to Payroll. Even retroactive actions older than 6 months that do not have a subsequent action, will require intervention of the helpdesk. This is called the "date hook" of what will capture and automatically send to payroll. The date hook is a rolling 6-month look back period and changes each month. The system will let you complete the task; however, it will not feed to Payroll without the Workday team's technical assistance.

Additional Information: For more in-depth training, with step by step instructions and videos, visit iLearn Oregon.
For system issues, please contact Workday.help@oregon.gov

Best practice for actions effective prior to the date hook is to contact Workday.help@oregon.gov before completing the action in Workday. Best practice when doing an action within the date hook (within 6 months), is to enter it, check with Payroll or use HR view only screens in OSPA to ensure it processed. If it did not, please reach out to Worday.help@oregon.gov. Note: Most recent actions on an employee <u>within the date hook</u>, even if retro, should still process to Payroll.

Future Effective Dated Actions

To improve the performance/data integrity of all Workday integrations a "step delay" was added to these three business processes (BP): Hire, Job Change and Termination. These will show as "in progress" until they complete. Their completion will now be set for the ***day after the effective date of the action***. This allows agencies to make corrections prior to them sending to OSPA. Each one is a bit different.

- **Hire BP** - The HR partner will complete all of the steps on the hire business process. The 'assign pay group' step will trigger like normal, but behind the scenes, it will actually trigger on the day of the effective date. What this means is at 12:01 a.m. the day of the effective date, the process will display as complete and subsequently send to payroll at 3:00 p.m. that day. Therefore, if the new hire does not show up or needs a change to their hire record, the agency will need to contact the Workday helpdesk to cancel it by 3 p.m. Prior to the hire date, it can still be cancelled within the agency roles. Note: The OR # will generate soon after 12:01 a.m. on the effective date. It will not be visible prior to the effective date.

- **Job Change BP** - The propose compensation change step will trigger on the day after the effective date. When this step is complete, the BP will complete.

- **Termination BP** – There is a "final approval" step for an HR partner that triggers 1 day after the effective date of the termination; HR Partners will confirm that they are ready to send this termination to payroll and all other integrations. Unfortunately, the step delay cannot be attached to the Manager approval, the HR approval, or the exit interview, because it would effectively remove all exit interviews from being completed. Therefore, the step delay has to occur after the exit interview. If an employee fails to complete the exit interview, there is a process to advance the BP at 6:00 a.m. one day prior to the termination effective date.

Additional Information: For more in-depth training, with step by step instructions and videos, visit iLearn Oregon.
For system issues, please contact Workday.help@oregon.gov

Page 2 of 2
Document Revised 9/24/2020