



# Top Student features review

Workday 2025R1

6 March 2025

# Your hosts



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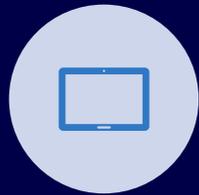
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Today's presentation may contain forward looking statements that are subject to risks and assumption as described in Workday's SEC filings.

# Housekeeping items



*All lines will be muted for today's webinar*



*Please submit any questions via the Q&A feature throughout the presentation*



*We will leave time at the end of the presentation for an additional Q&A*



*There will be a brief survey sent out at the end of this webinar*



*We will be following up with a FAQ Sheet with the Q&A from the session*

# Release preparation

## Check Release Center

- Review Automatically Available items
- Subscribe to important Release Notes in Community
- Review retirement Release Notes

## Change management plan

- Changes to the user experience or process updates
- Retiring functionality
- When to uptake Setup Required functionality

## Prepare the tenant

- Run audit reports and resolve issues:
  - In Production **before** Sandbox Preview is updated with the release
  - In Sandbox Preview **after** it is updated with the release

## Execute test plans

- Test integrations first
- System data validation
- Critical business processes
- Critical custom reports

Visit Workday's Feature Release Planning Guide (US) here: <https://community-content.workday.com/en-us/reference/learn/get-started/get-started-with-workday/feature-release-planning.html>

# Student release features

## Admissions

- Delay Student External Account Creation
- Transfer Credit Evaluation

## Financial Aid

- PLUS Loans: Relationship to Student Field
- Custom Dates and Breaks for Return of Title IV
- Action Items: Added Flexibility with Assigning Holds for BPs

## Advising

- Academic Progress Evaluation for Future Effective-Dated Programs of Study

## Student Core

- Course Section Capacity Visibility
- Military Service Information for Workday Student
- Hide Military Details on Student Profile

## Student Finance

- New Student Waiver Experience
- Student Payment Precedence Charge Item Selection
- Cancel Charges for Academic Period

## Student Records

- Course Waitlist Policy Configurations
- Custom Help Text on Registration Waitlist Availability Business Process
- Roll Over Academic Period Registration Appointments

# Your team of experts



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# Admissions

# Presented by



April Perdomo

Consultant

# Delay Student External Account Creation

Workday enables you to delay external student site account creation for applicants to Fast Path programs

## Reasons to consider this feature

- The enhancements give you more control over who Workday creates external student site accounts for and when the accounts get created.

## What do I need to do

- On the Maintain Delay Student External Account Creation Policy task, configure policies for Fast Path programs of study or academic units and academic levels that contain Fast Path programs of study.
- You can now create condition rules for the Create Student External Account business process that use report fields on the Student Application business object. From there you can specify the creation of accounts only for populations using the external student site.
- You can add step delays for the Publish Application Grouping business process that use report fields on the Application Grouping business object.

<https://doc.workday.com/release-notes/en-us/stups/8396665.html>

# Delay Student External Account Creation, cont.

Workday enables you to delay external student site account creation for applicants to Fast Path programs

## What happens if I do nothing

- If any existing delay student external account creation policies include Fast Path programs of study, and the Student Application Fast Path Event business process is configured to flag Fast Path applications for review, Workday now delays account creation for applicants to those programs of study. If you intend to delay account creation, we recommend that you review your configurations and verify that your setup is working as expected.
- The Create Student External Account and Publish Application Grouping business processes will run as they do today.

## Policy example

**Maintain Delay Student External Account Creation Policy**

Academic Unit \* Alma Mater University

Academic Level \* Undergraduate

Effective Date 01/01/1900

Delay External Account Creation

## Step delay example

Business Process > Create Condition Rule

Deployments > Maintain Advanced Routing

Effective Stating > Maintain Step Conditions

Favorite > **Maintain Step Delay**

Set as Comp on

<https://doc.workday.com/release-notes/en-us/stups/8396665.html>

# Transfer Credit Evaluation

Workday provides more information about coursework and test results that don't receive transfer credit

## Reasons to consider this feature

- This update makes it easier for you to troubleshoot why a course or test result doesn't receive transfer credit from a transfer credit evaluation. This enables your staff and personnel to support student success and pathways with efficiency and transparency.
- On these tasks, the summary page will display a new:
  - **Failure Reason** column on the **No Credit from Coursework** and **No Credit from Exams** grids, to display the reasons why transfer credit isn't granted.
  - **Transfer Credit Troubleshooting** button that enables you to access the transfer credit troubleshooting console for the external record.

## What do I need to do

- This feature is automatically available. We recommend that you update your training materials so that users are aware of the changes

	Course Units Attempted	Grade	Additional Course ID	Course Repeat Code	Failure Reason
on l	3	B			No transfer credit rules apply for this coursework.

Transfer Credit Troubleshooting

<https://doc.workday.com/release-notes/en-us/stuops/8455726.html>

# Transfer Credit Rules

Workday enables you to specify the unit type for minimum units on each version of transfer credit rules

## Reasons to consider this feature

- This feature provides you with more flexibility to accommodate external courses with different unit types

Minimum Units

5

Unit Type \*

Semester Units

## What do I need to do

- Update these web services to v44.0 or later:
  - Get Student Transfer Credit Rules
  - Put Student Transfer Credit Rule
- Update your custom reports to use the new Unit Type for Minimum Units report field.

<https://doc.workday.com/release-notes/en-us/stuops/8455726.html>

# Admissions Features at-a-glance

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## Delay Student External Account Creation

JIRA	STUPS-19192
Setup effort	Setup required
Change impact	Includes Fast Path Programs in delayed External Account Creation

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## Transfer Credit Evaluation

JIRA	STOUPS-7231
Setup effort	Automatically available
Change impact	Provides more accessibility when troubleshooting transfer credit

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## Transfer Credit Rules

JIRA	STOUPS-6745
Setup effort	Setup required
Change impact	Provides flexibility for external course units

# Student Core

# Presented by



Heather Gutman

Principal Consultant

# Course Section Capacity

Workday updates course section reports to display more details about the available seats in a course section

## Reasons to consider this feature

- This change enables administrators and students to see what seats are available in a course section, providing more visibility into the available waitlist and reserve capacity

## What do I need to do

- This feature is automatically available. We recommend that you update your training materials so that users are aware of the changes
- You can update your custom reports to use the new report fields

<https://doc.workday.com/release-notes/en-us/stucurr/8302319.html>

# Course Section Capacity demo

## Course Section Definition – Administrative View

**ACCT 202-1 - Introduction to Managerial Accounting** ⋮

Status **Open** Academic Level **Undergraduate**

Course **ACCT 202 - Introduction to Managerial Accounting**

Overview Course **Section Controls** Course Fees Course Materials Process History

### General Information

Unlimited Capacity **No**

Projected Enrollment **6**

**Total Section Capacity** **6**

Unreserved Seats Available **4 of 4**

Reserved Seats Available **2 of 2**

### Reserved Seats Available by Eligibility

2 items

Eligibility Rule	Available Seats	Seat Capacity
Pre-Med	2	2
<b>Total:</b>	<b>2</b>	<b>2</b>

### Additional Details

Manually Manage Waitlist Promotion **No**

**Waitlist Seats Available** **2 of 2**

Published Instructor Roles **Instructor**  
**Teaching Assistant**

Allowed Grading Bases **Graded**

Graded Anonymously **No**

Grid Configuration for Final Grade Roster **(empty)**

Grid Configuration for Interim Grade Roster **(empty)**

Public Notes

Private Notes

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Course Section Capacity demo

## Course Section Report – Public View

**View Course Section**
ACCT 202-1 - Introduction to Managerial Accounting ⋮

**General Information**

**Course** [ACCT 202 - Introduction to Managerial Accounting](#)

**Description** Introductory study of the process of identification, measurement, accumulation, summarization, preparation, interpretation, analysis, and communication of financial and non-financial information to assist managerial planning, controlling, and decision-making within an organization to assure appropriate use of and accountability for the organization's resources.

Students study terminology, cost behavior, cost estimation, cost assignment, cost accounting systems, cost of quality, financial and operational budgeting, performance evaluation, profitability analysis, pricing methodologies, and short-term and long-term decision-making techniques.

**Academic Period** 2025 Spring Semester

**Instructor** Lew Mathis ()

**Start/End Date** 01/06/2025 - 05/20/2025

**Status** Open

**Total Section Capacity** 6

**Unreserved Seats Available** 4 of 4

**Reserved Seats Available** 2 of 2

Reserved Seats Available by Eligibility 2 items ⌵ ⌶ ⌷ ⌸ ⌹ ⌺ ⌻ ⌼ ⌽ ⌾ ⌿

Eligibility Rule	Available Seats	Seat Capacity
Pre-Med	2	2
<b>Total:</b>	2	2

Add to Saved Schedule
Troubleshoot

**Additional Details**

**Units** 3 Units

**Grading Basis** Graded

**Instructional Formats** Lecture

**Delivery Mode** In-Person

**Meeting Patterns** [Monday/Wednesday/Friday | 11:00 AM - 11:50 AM](#)

**Course Materials** [Introduction to Managerial Accounting \(7th\)](#)

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Military Service Information for Workday Student

Workday adds military service grids to the Military Details profile group of the student profile

## Reasons to consider this feature

- Workday improves user experience by extending access to students' military service information on the Military Details profile group

## What do I need to do

- To upload documents related to students' military service, you need to configure document types under the Military Service (Student) category using the Maintain Student Document Types task

<https://doc.workday.com/release-notes/en-us/stucore/8368643.html>

# Military Service Information for Workday Student, cont.

Workday adds military service grids to the Military Details profile group of the student profile

## What happens if I do nothing

- If you don't configure document types for the Military Service (Student) category, you won't be able to upload or associate documents related to a student's military service

## Additional considerations

- The grid will only appear when the student has a Military Service is selected via the Personal information.
- If the student just has the military relationship set to yes but the service is not added, the documents and grid will not appear.

<https://doc.workday.com/release-notes/en-us/stucore/8368643.html>

# Military Documents demo

Active military student

The screenshot displays a student profile page for Alma Mater University. The left sidebar contains navigation options: Summary, Personal, Contact, Academics, Financial Aid, Student Financials, Military Details (highlighted with a red box), Action Items and Holds, Portfolio, and History. The main content area is titled 'Overview' and features an 'Edit' button. Below the button, the 'Military Relationship' is listed as 'Yes' (highlighted with a red box). Under the heading 'Student Veteran Benefits', the following information is shown:

Military Status for Benefits	Child
Parent on Active Duty	No
Veterans Bill /Benefit	Dependents Educational Assistance (DEA – CH 35)
Service History for Benefits	(empty)

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Military Documents demo

Documents Category added for Military Documents in student profile

The screenshot displays the 'Student Core' interface for Alma Mater University. On the left is a blue sidebar with navigation options: Summary, Personal (highlighted with a red box), Contact, Academics, Financial Aid, Student Financials, Military Details, Action Items and Holds, and History. The main content area has a top navigation bar with tabs: Names, Personal Information, Contact, Residency, Documents (highlighted with a red box), Friends and Family, IDs, Additional Data, Active Person Profiles, Housing, Accommodations, and More. Below the tabs is an 'Add' button. A table shows 6 items under the 'Student' tab. The first two rows are highlighted with a red box. The table columns are Document, Type, Category, Event, Comment, and Upload Date. The first row shows 'Military Doc example.jpg' with Type 'Military Documents' and Category 'Military Service (Student)'. The second row shows the same document with an upload date of 02/19/2025 10:46:35 AM. The third row shows '23-24-Dependent-VerificationForm.docx' with Type 'Federal Verification' and Category 'Action Item (Student)'. The fourth row shows '2021-ParentTaxTranscript.pdf' with Type 'Federal Verification' and Category 'Action Item (Student)'. The fifth row shows 'Accommodation\_verification.pdf' with Type 'Accommodation Verification' and Category 'Accommodation Verification (Student)'. The sixth row shows 'drivers license.jpg' with Type 'Driver's License' and Category 'Residency Determination (Student)'. Each row has 'Edit' and 'Delete' buttons.

Document	Type	Category	Event	Comment	Upload Date		
Military Doc example.jpg	Military Documents	Military Service (Student)			02/21/2025 12:28:01 PM	Edit	Delete
Military Doc example.jpg	Military Documents	Military Service (Student)			02/19/2025 10:46:35 AM	Edit	Delete
23-24-Dependent-VerificationForm.docx	Federal Verification	Action Item (Student)			12/28/2023 02:06:22 PM		
2021-ParentTaxTranscript.pdf	Federal Verification	Action Item (Student)			12/28/2023 02:06:16 PM		
Accommodation_verification.pdf	Accommodation Verification	Accommodation Verification (Student)			04/21/2023 03:30:54 PM		
drivers license.jpg	Driver's License	Residency Determination (Student)			04/21/2023 03:22:29 PM	Edit	Delete

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Military Documents demo

## Edit Personal Information: Military Status

### Edit Personal Information (United States of America)

Change Personal Information

#### Military Service

**Military Status \***

0 - Active (United States of America)

Military Discharge Date

MM/DD/YYYY

**Details**

Status Begin Date

MM/DD/YYYY

Military Discharge Type

Military Service Type

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

Names **Personal Information** Contact Residency Documents

Student | Alma Mater University

Actions

- Summary
- Personal**
- Contact
- Academics
- Financial Aid
- Student Financials
- Military Details
- Action Items and Holds
- History

Gender	Female
Date of Birth	04/11/2005
Age	19 years, 10 months, 20 days
Marital Status	(empty)
Hispanic or Latino	Yes
Race/Ethnicity	Hispanic or Latino (United States of America)
Race/Ethnicity Details	(empty)
Citizenship Status	Citizen (United States of America)
Last Medical Exam	(empty)
Last Exam Valid To	(empty)
Sexual Orientation	(empty)
Gender Identity	(empty)
Pronoun	(empty)

**Military Service** 1 item

Military Status

0 - Active (United States of America)

# Military Documents demo

## Military Service Grid/Documents

Overview

Edit

Military Relationship Yes

### Student Veteran Benefits

Military Status for Benefits Child

Parent on Active Duty No

Veterans Bill /Benefit Post 9/11 GI Bill (CH 33)

Service History for Benefits (empty)

### Military Service 1 item

Military Status

0 - Active (United States of America)

### Military Service Documents 2 items

Document	Type	Category	Comment	Upload Date
<a href="#">Military Doc example.jpg</a>	Military Documents	Military Service (Student)		02/21/2025 12:28:01 PM
<a href="#">Military Doc example.jpg</a>	Military Documents	Military Service (Student)		02/19/2025 10:46:35 AM

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Hide Military Details on Student Profile

Workday hides Military Details profile group on students' profiles after setting their military relationships to No

## Reasons to consider this feature

- This update provides a better user experience by minimizing confusion around which students have military relationships

## What do I need to do

- Automatically available

<https://doc.workday.com/release-notes/en-us/stucore/8368639.html>

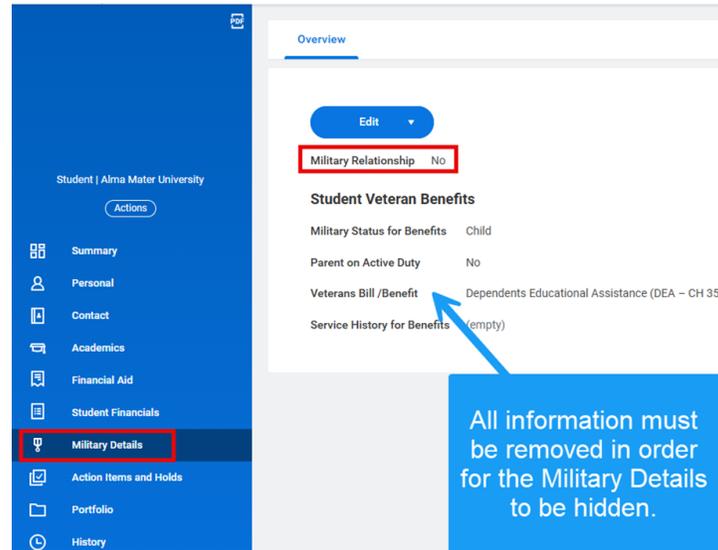
# Hide Military Details demo

Do this only if the student has no history of Military benefits.

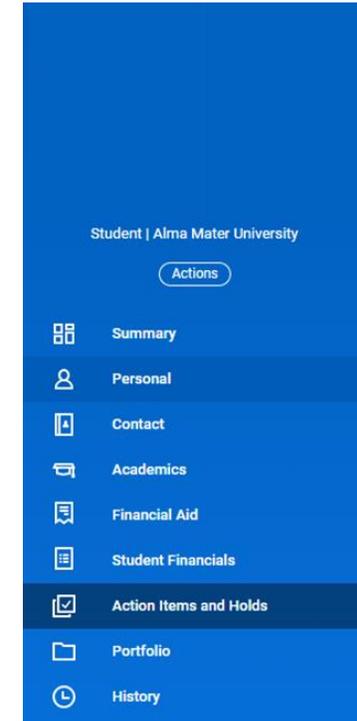
## Edit Military Relationship



## Veteran's Benefits



## Military Details is now hidden



# Student Core features at-a-glance

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## Course Section Capacity

JIRA	STUCURR-4827
Setup effort	Automatically available
Change impact	Gives more visibility into Course Section Details for Staff and Students

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## Military Service Information for Workday Student

JIRA	STUCORE-10139
Setup effort	Setup required
Change impact	Gives more visibility to student's military information in one place for students with military service selected

---

## Hide Military Details on Student Profile

JIRA	STUCORE-10145
Setup effort	Automatically available
Change impact	Gives flexibility to hide military details if information was inputted incorrectly or no longer valid

# Advising

# Academic Progress Evaluation for Future Effective-Dated Programs of Study

Workday enables the Academic Progress job to run the night of the effective date of a program of study change

## Reasons to consider this feature

- This enhancement ensures that course registrations reflect accurately on the student's Academic Progress report and Financial Aid load status

## What do I need to do

- For existing programs of study that are effective dated for the future, run the Academic Progress job on or after the date that the program of study change is effective

<https://doc.workday.com/release-notes/en-us/stuadv/8723612.html>

# Academic Progress Evaluation for Future Effective-Dated Programs, cont.

Financial Aid, Advising

## What happens if I do nothing

- The Academic Progress job won't run on the existing programs of study that are future effective-dated
- The Refresh Attendance Plan job, which bases its calculations on the Academic Progress job, might not update the financial aid load status accurately for the existing future effective-dated programs of study

## Additional considerations

- No downside!
- Consider running a mass launch of APR's after the release is in Production to catch up on changes in effective dates! The automatic launch will only occur when changes are made after the release is in Production with.

# Academic Progress Report demo

Student | Alma Mater University

Actions

Email

- Summary
- Personal
- Contact
- Academics
- Financial Aid
- Student Financials
- Action Items and Holds
- History

Overview | Earned Credentials | Current Classes | Plan | Academic History | Academic Progress | External Records | Questionnaire Answers

Alma Mater University - College of Business & Economics/Undergraduate (Business Administration Major)

Student

Institution Alma Mater University

Educational Objective 3 items

Program of Study	Bundled Programs of Study	Declare Date	Expected Completion	Status	Reason	Primary	
Business Administration Major		08/27/2024	12/31/2026	In Progress		Yes	Request
Computer Science M.S.		08/31/2022	12/31/2026	Discontinued	Academic Action	No	
	Accounting Minor	08/01/2024	12/31/2026	Discontinued	Academic Action	No	

[Add Program of Study](#)
[Add Program of Study](#)
[Add Advisory Program](#)

Upcoming Changes 4 items

Effective Date	Program of Study	Status
02/13/2025	Business Administration Major	In Progress
	Computer Science M.S.	Discontinued
	Economics Major	In Progress
	Accounting Minor	Discontinued

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Academic Progress Report demo, cont.

Overview | Earned Credentials | Current Classes | Plan | Academic History | Competencies | **Academic Progress** | External Records | Questionnaire Answers

Alma Mater University - College of Business & Economics/Undergraduate (Business Administration Major)

Business Administration Major  
14.3%  
1 Satisfied of 7 Requirements

### APR before overnight update

Cumulative GPA Including Transfer: 3.889

Unused Registrations: 13

Overall Academic Progress: 1 item

	Units Defined	Units in Progress	Units Satisfying	Remaining	Status
	90	3	0	Minimum 60 Unit(s)	Not Satisfied

Business Administration Major Requirements

Primary POS GPA: 0.000

Requirements Effective: 08/27/2024 | Last Evaluated: 12/12/2024 10:29:10 AM GMT-08:00 Pacific Time (Los Angeles)

7 items

Requirement	Status	Remaining	Satisfied With			
			Registrations Used	Academic Period	Units	Grade
2.0 Cumulative GPA	Satisfied					
Oral Communication	Not Satisfied	Minimum 1 Course(s)				
Written Communication	Not Satisfied	Minimum 1 Course(s)				
Quantitative Reasoning	In Progress		MATH 105 - Statistics (In Progress)	2024 Fall Semester	3	
Arts	Not Satisfied	Minimum 1 Course(s)				
Humanities	Not Satisfied	Minimum 1 Course(s)				
Diversity	Not Satisfied	Minimum 2 Course(s)				

Alma Mater University - College of Engineering/Undergraduate (Computer Science Major)

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Academic Progress Report demo, cont.

On 2/13/25 - POS is now In Progress

Alma Mater University - College of Business & Economics/Undergraduate (Economics Major/Business Administration Major)

Student

Institution Alma Mater University

Educational Objective 4 items

Program of Study	Bundled Programs of Study	Declare Date	Expected Completion	Status	Reason	Primary	
Business Administration Major		08/27/2024	12/31/2026	In Progress		Yes	Request
Economics Major		02/13/2025	12/31/2026	In Progress		No	Request
Computer Science M.S.		08/31/2022	12/31/2026	Discontinued	Academic Action	No	
	Accounting Minor	08/01/2024	12/31/2026	Discontinued	Academic Action	No	

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Academic Progress Report demo, cont.

APR launched overnight – new APR is reflected

Overview | Earned Credentials | Current Classes | Plan | Academic History | **Academic Progress** | External Records | Questionnaire Answers

Alma Mater University - College of Business & Economics/Undergraduate (Economics Major/Business Administration Major)

Business Administration Major: 14.3% (1 Satisfied of 7 Requirements)

Economics Major: 4.3% (1 Satisfied of 23 Requirements)

APR updated overnight

Cumulative GPA Including Transfer: 3.889

Unused Registrations: 2

Overall Academic Progress: 1 item

	Units Defined	Units in Progress	Units Satisfying	Remaining	Status
	60	0	24	Minimum 36 Unit(s)	Not Satisfied

> Business Administration Major Requirements

> Economics Major Requirements

Primary POS GPA: 3.889

Requirements Effective: 02/13/2025 | Last Evaluated: 02/13/2025 01:35:39 AM GMT-08:00 Pacific Time (Los Angeles)

32 Items

Requirement	Status	Remaining	Registrations Used	Academic Period	Units	Grade
2.0 Cumulative GPA	Satisfied					
Oral Communication	Not Satisfied	Minimum 1 Course(s)				
Written Communication	Not Satisfied	Minimum 1 Course(s)				
Quantitative Reasoning	In Progress		MATH 105 - Statistics (In Progress)	2024 Fall Semester	3	
Arts	Not Satisfied	Minimum 1 Course(s)				
Humanities	Not Satisfied	Minimum 1 Course(s)				
Diversity	Not Satisfied	Minimum 2 Course(s)				
Physical Sciences	In Progress		CHEM 111 - General Chemistry I (In Progress)	2025 Spring Semester	4	
Individual and Society	Not Satisfied	Minimum 1 Course(s)				
Societal Institutions	Not Satisfied	Minimum 1 Course(s)				

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Advising Features at-a-glance

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## Academic Progress Evaluation for Future Effective- Dated Programs of Study

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JIRA	STUADV-10692, STUFAD-47587
Setup effort	Automatically available
Change impact	This will allow staff and students to view the APR without any intervention. Saves time and frustration. Remember to run the Mass Launch of APRs to catch up on previous changes prior to the release.

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# Financial Aid

# Presented by



Michael Birchett

Principal Consultant

# PLUS Loans: Relationship to Student Field

Workday adds the Relationship to Student reportable field for PLUS loan applications

## Reasons to consider this feature

- Identify PLUS loan applications with fraudulent borrowers who aren't eligible student guardians

## What do I need to do

- Automatically available

<https://doc.workday.com/release-notes/en-us/stufad/7774305.html>

# PLUS Loans: Relationship to Student Field demo

## New Relationship to Student Field and Options

**Default Overpay Code \***  No  School Override  Yes  No

**Credit Requirements Met**

**Relationship to Student**  Adoptive Parent  Other  Parent  Spouse of Parent or Adoptive Parent

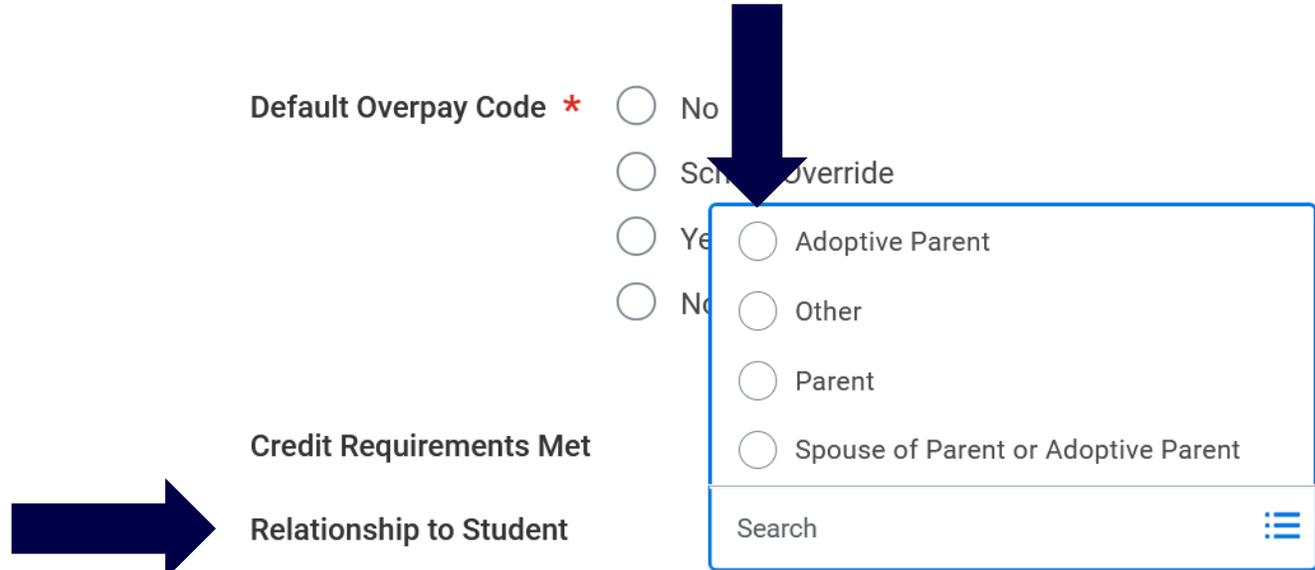
**Reconsideration Eligible**

**Original Credit Decision Status**  Approved  Denied  None of the above

**Endorser Approved**

**School Credit Balance Option**

Search 



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Custom Dates and Breaks for Return of Title IV

Workday enables you to use custom start and end dates for academic periods

## Reasons to consider this feature

- This update gives you more flexibility when calculating Return of Title IV, enabling you to accommodate individual student needs more effectively

## What do I need to do

- Add the new report fields to your custom reports

<https://doc.workday.com/release-notes/en-us/stufad/8275392.html>

# Custom Dates and Breaks for Return of Title IV, cont.

Workday enables you to use custom start and end dates for academic periods

## What happens if I do nothing

- The new options will display on the Maintain Return of Title IV Worksheet task

## Additional considerations

None

<https://doc.workday.com/release-notes/en-us/stufad/8275392.html>

# Custom Dates and Breaks for Return of Title IV demo

## Maintain Return of Title IV Worksheet

### Maintain Return of Title IV Worksheet

#### R2T4 Worksheet Summary

Student	[Redacted]
Institution	Alma Mater University
Academic Period	2024 Spring Semester
Total Institutional Charges	\$0.00
Institutional Charges Earned	\$0.00
Return Deadline	02/22/2025



#### Earned Aid Summary

Total Title IV Aid Awarded	\$9,057.00
Percentage of Aid Earned	0.8%
Title IV Aid Earned	\$72.46
Title IV Aid Grant Protection for Student	\$1,436.00

#### Returned Aid Summary

Title IV Aid Funds to Be Returned	\$8,984.54
Title IV Aid Funds to Be Returned by Institution	\$0.00
Title IV Loans to Be Returned by Student	\$6,185.00
Title IV Aid Grant Funds to Be Returned by Student	\$1,363.54

- Title IV Aid Information
- Percentage Earned
- Institutional Charges
- Institutional Returns
- Student Returns
- Post-Withdrawal Disbursement Tracking Sheet

4 items			
Title IV Grant Program	Academic Period Amount	Amount Disbursed	Remaining Amount to Be Disbursed
Iraq and Afghanistan Service Grant	0.00	0.00	\$0.00
Pell Grant	2,372.00	2,372.00	\$0.00

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Custom Dates and Breaks for Return of Title IV demo

## Maintain Return of Title IV Worksheet

Title IV Aid Information   **Percentage Earned**   Institutional Charges   Institutional Returns   Student Returns   Post-Withdrawal Disbursement Tracking Sheet

---

### Percentage Earned

Withdrawal Date \*

Date of Determination

Use Program of Study Dates and Breaks  
 Override Program of Study Dates and Breaks  
 Manually Enter Percentage Earned

Academic Period (Standard)   2024 Spring Semester

Start Date   01/08/2024

End Date   05/17/2024

Academic Periods with Breaks Used for Calculations   2024 Spring Semester

Holiday Calendar   AMU Non-Instructional Days



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Custom Dates and Breaks for Return of Title IV demo

## Maintain Return of Title IV Worksheet

Use Program of Study Dates and Breaks  
 Override Program of Study Dates and Breaks  
 Manually Enter Percentage Earned

Academic Period (Standard) 2024 Spring Semester

Start Date \* 01/08/2024 

End Date \* 05/17/2024 

Academic Periods with Breaks Used for Calculations 2024 Spring Semester

Holiday Calendar AMU Non-Instructional Days

Break Day Date Ranges Used in Calculation 1 item

	Start Date	End Date
 	MM/DD/YYYY 	MM/DD/YYYY 

Completed Days 1

Total Days 131

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Custom Dates and Breaks for Return of Title IV demo

## Maintain Return of Title IV Worksheet

The screenshot shows a web form titled "Percentage Earned". It contains the following fields and options:

- Withdrawal Date \***: A date picker field containing "01/08/2024".
- Date of Determination**: A date picker field containing "MM/DD/YYYY".
- Radio Button Options**:
  - Use Program of Study Dates and Breaks
  - Override Program of Study Dates and Breaks
  - Manually Enter Percentage Earned
- Manual Input**: A section containing a text input field for "Percentage Earned % \*" with the value "18".
- Comment Field**: A text area with a placeholder "enter your comment" and a small profile picture icon to the left.
- Buttons**: "Submit" and "Cancel" buttons at the bottom.

Two dark blue arrows are overlaid on the form: one points to the "Manually Enter Percentage Earned" radio button, and the other points to the "Percentage Earned %" input field.

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Action Items: Added Flexibility with Assigning Holds for BPs

Workday provides you with more flexibility in applying ISIR action item holds

## Reasons to consider this feature

- Conditionally apply ISIR action item holds only to applicants or matriculated students
- Apply multiple holds within a BP
- Remove holds before a BP completes

## What do I need to do

- Ensure that you create unique holds for each BP to prevent potential conflicts between concurrently running BPs with the same hold type and hold reason

<https://doc.workday.com/release-notes/en-us/stufad/8426423.html>

# Action Items: Added Flexibility with Assigning Holds for BPs, cont.

Workday provides you with more flexibility in applying ISIR action item holds

## What happens if I do nothing

- Although Workday doesn't recommend it, you can still use the existing Setup Student Holds service until we fully retire it in September 2026

## Additional considerations

<https://doc.workday.com/release-notes/en-us/stufad/8426423.html>

# Action Items: Added Flexibility with Assigning Holds for BPs demo

## Setup Student Hold

Type	Specify
Initiation	
Service	Setup Student Hold
Service	Assign Action Item

## Setup Student Hold Configuration

### Configure Event Service

Workflow Step Federal Verification Event (2024-2025) step b - Service [Setup Student Hold]

Event Service Setup Student Hold

Effective Date 02/24/2025

Time Zone \* GMT-08:00 Pacific Time (Los Angeles)

Hold Reason Federal Verification

Hold Types \*  Disbursement 

Need Packaging

Search

Disbursement

Need Packaging

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Action Items: Added Flexibility with Assigning Holds for BPs demo

## Create Student Hold Reason

### Edit Student Hold Reason Verification Hold

Academic Unit \* Alma Mater University

Academic Level (empty)

Name \* Verification Hold

Description Normal **B** *I* U A : : ⌵ ⌵ ✉ ⌵ ⌵

This hold prevents federal aid packaging for continuing students that have been selected for Federal Verification by the Department of Education.

Resolution Instructions Normal **B** *I* U A : : ⌵ ⌵ ✉ ⌵ ⌵

Please complete all Federal Verification requirements to release this hold.

Applies to Hold Types \*  Need Packaging

Automatically Activate for Historical Students ← All

Inactive

In Use

- Charge Assessment
- Diploma
- Disbursement
- Full Registration
- Merit Packaging
- Need Packaging
- Refund
- Registration Add
- Self-Service Payment
- Silent Full Registration
- Transcript

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Action Items: Added Flexibility with Assigning Holds for BPs demo

## Apply Student Hold

	Type	Specify
	Initiation	
	Service	Apply Student Hold
ent	Service	Assign Action Item

## Apply Student Hold Configuration

### Configure Event Service 9/19/2025

Workflow Step Federal Verification Event (2024-2025 TEST) step b - Service [Apply Student Hold]

Event Service Apply Student Hold

Effective Date 02/24/2025

Time Zone \* GMT-08:00 Pacific Time (Los Angeles)

Hold Reason \*

Description This hold prevents federal aid packaging for continuing students that have been selected for Federal Verification by the Department of Education.

Resolution Instructions Please complete all Federal Verification requirements to release this hold.

Hold Type \*

Context \*  Applies to Institution - Alma Mater University  
 Select a Federal School Code

Award Year

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Action Items: Added Flexibility with Assigning Holds for BPs demo

## Configure Apply Student Hold

Business Process Steps | Notifications | Allowed Actions by Role | Allowed Services | Related Links | Available Rules & Fields | 1 Error and 1 Alert

Business Process Steps 6 items

Step	Order	If	Notes	Type	Specify	Optional
Q	a			Initiation		No
Q	b			Service	Apply Student Hold	No
Q	c	Independent Student? Verification Group V1 or V5?	2024-2025 Independent Verification Form	Service	Assign Action Item	No
Q	c	Student IRS Tax Transcript Required? Verification Group V1 or V5?	2022 Student IRS Federal Tax Transcript	Service	Assign Action Item	No
Q	d	New Action Items Assigned? (Workday Owned)		Action	Evaluate and Complete Financial Aid Action Items	No
Q	e			Service	Remove Student Hold	No

## Configure Remove Student Hold

**Configure Event Service**

**Workflow Step** Federal Verification Event (2024-2025 TEST) step e - Service [Remove Student Hold]

**Event Service** Remove Student Hold

**Effective Date** 02/24/2025

**Time Zone** \* GMT-08:00 Pacific Time (Los Angeles)

**Apply Student Hold Service Step \*** × Step b - Service (Apply Student Hold)

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Action Items: Added Flexibility with Assigning Holds for BPs demo

## Setup Student Hold



ISIR



Award Year

2023-2024 Award Year

Grade Level Group

Undergraduate or Graduate

Transaction

1

Status

Active

Rejected

No

Locked

No

Federal School Code

010121

Hold

Disbursement

Need Packaging

## Apply Student Hold

Student Hold Assignment [Need Packaging Hold for \[redacted\]](#)

Student

[redacted]

Hold Reason

[Verification Hold](#)

Description

This hold prevents federal aid packaging for continuing students that have been selected for Federal Verification by the Department of Education.

Resolution Instructions

Please complete all Federal Verification requirements to release this hold.

Created On

02/24/2025

Created by

[redacted]

Hold Type

Need Packaging

Applies to Institution - Alma Mater University

Hold History 1 item



Completed On	Hold Event
02/24/2025 02:20:47.378 PM	<a href="#">Apply: Need Packaging - Verification Hold</a>

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# How we can help you prepare

## Assigning Holds for BPs

- Configuration support
  - Review existing configuration and setup of your business processes
  - Explore/demo your ideas for enhanced or more nuanced functionality for special populations
  - Configuration and knowledge transfer support
- Change Management Support

Contact your Engagement Manager to get started!

# Financial Aid features at-a-glance

---

## PLUS Loans: Relationship to Student Field

---

JIRA	STUFAD-32974
Setup effort	Automatically available
Change impact	Workday adds the Relationship to Student reportable field for PLUS loan applications.

---

---

## Custom Dates and Breaks for Return of Title IV

---

JIRA	STUFAD-43745
Setup effort	Automatically available
Change impact	With this release, Workday enables you to use custom start and end dates for academic periods and break day date ranges when calculating Return of Title IV for a student.

---

---

## Action Items: Added Flexibility with Assigning Holds for BPs

---

JIRA	STUFAD-12136
Setup effort	Setup required
Change impact	Workday now provides you with more flexibility in applying ISIR action item holds for certain business processes

---

# Student Finance

# Presented by



Ron Ballard

Functional Architect

# New Student Waiver Experience

Workday delivers enhanced configuration options for assigning waivers

## Reasons to consider this feature

- This functionality enables institutions to now more accurately assign and manage effective-dated waiver assignments, leading to improved administrative efficiency and a reduced risk of errors. This gives institutions greater control, ensuring students receive the correct financial support

## What do I need to do

- Going forward, to edit an existing waiver item assignment dated 01-01-2000 and:
  - Adjust a waiver payment amount, edit the student waiver rule linked to the relevant waiver item
  - Change the eligibility calculation, edit the calculation on the waiver item assignment and waiver item assignment line
- Going forward, to edit waiver item assignments in a current or future academic period and create new assignment policies for a new effective date, create the assignment policy for the standard start date of the academic period in which you want to assign waiver payments based on the new configuration

<https://doc.workday.com/release-notes/en-us/stufin/8410666.html>

# New Student Waiver Experience, cont.

Workday delivers enhanced configuration options for assigning waivers

## What happens if I do nothing

- We have converted eligibility and amount calculations from waiver items to waiver item assignments and waiver item rules. Waiver payments assigned from existing waiver items will continue to behave as expected
- Existing waiver payments will remain the same. All assignments will remain effective-dated from 2000-01-01
- Accounting for waiver payments will continue to work as expected

## Additional considerations

- Now you can Calculate waiver amounts based on percentage of a Student's account charges associate with specific award amounts or use the Calculation Engine.

<https://doc.workday.com/release-notes/en-us/stufin/8410666.html>

# Student Waiver Item Assignment demo

## Student Selection Criteria

### Maintain Student Waiver Item Assignments



#### Student Selection Criteria

- Academic Unit / Academic Level
- Program of Study / Program Focus

Academic Unit \*

Academic Level \*

#### Choose a Definition

Existing

## Maintain Student Waiver Item Assignment

Effective Date \* 01/01/2000

1 item

If	Student Waiver Item Rule	Inherited From

You can't remove an assignment line that has created a waiver payment. Edit the assignment line to adjust the waiver payment instead.

3 items

	If	*Student Waiver Item Rule
+		
-		x Fee Waiver rule
-	x Senior Citizen	x Senior Citizen Waiver rule

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Student Waiver Assignment demo

## Create Student Waiver Item Rule

### Create Student Waiver Item Rule ✕

**Name** \*

**Student Waiver Item** \*

**Calculation**

**Waiver Amount Rules** 1 item ☰ ☰ ↗

<input type="checkbox"/>	*Charge Type	Student Charge Items	*Percent
<input checked="" type="checkbox"/>	<input type="text" value="× Tuition ..."/>	<input type="text" value="× Tuition - Flat Rate ..."/> <input type="text" value="× Tuition ..."/>	<input type="text" value="100"/>

**OK** **Cancel**

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Student Payment Precedence Charge Item Selection

Workday enables you to select individual student charge items to include in your payment precedence group

## Reasons to consider this feature

- This feature helps you save time by explicitly adding charge items to include in precedence lines rather than excluding all other charge items of a charge type. This functionality also reduces your payment precedence maintenance when you add new charge items

## What do I need to do

- Workday delivers this new and updated functionality automatically

<https://doc.workday.com/release-notes/en-us/stufin/7733919.html>

# Student Payment Precedence Charge Item Selection, cont.

Workday enables you to select individual student charge items to include in your payment precedence group

## What happens if I do nothing

- When you do nothing and add additional charge items, you'll need to maintain your payment precedence groups to continue to exclude them from payment precedence

## Additional considerations

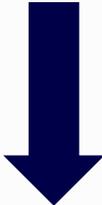
- You can now add a row to identify a specific Charge Item (Charge Item Inclusion) to be paid prior to any other Charge Items and/or Charge Types
- For each row in a precedence group, you can add a Charge Item and a Charge Type if you want them to have the same priority. However, the Charge Item cannot be within the same Charge Type as it will already be included.

<https://doc.workday.com/release-notes/en-us/stufin/7733919.html>

# Payment Precedence Group demo

## Individual Charge Item Selection

	Order	Charge Type	Charge Item Exclusion	Charge Item Inclusion	Charge Item Exclusion Removed by Conversion
(+)					
(+) (-)	▼ ▼	<input type="text"/>	<input type="text"/>	× International Student Deposit	
(+) (-)	▲ ▼	× Tuition	<input type="text"/>	× Online Course Fee	
(+) (-)	▲ ▼	× Mandatory Fees	× Online Course Fee × Academic	<input type="text"/>	



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Cancel Charges for Academic Period

Workday enables you to cancel charges for a student for an academic period

## Reasons to consider this feature

- This enhancement saves time by eliminating the need to cancel charges individually and reduces the risk of errors by enabling bulk cancellation for an academic period

## What do I need to do

- Automatically available

<https://doc.workday.com/release-notes/en-us/stufin/8382486.html>

# Cancel Charges for Academic Period demo

## Cancel and Reassess Student Charges

### Cancel and Reassess Student Charges

Please confirm that you wish to cancel the student charge(s) below.

Cancel Charges Only



4 items



Academic Period	Transaction Date	Due Date	Transaction	Amount
2024 Spring Semester	08/29/2024	08/29/2024	Commuter Meal Plan	625.00
2024 Spring Semester	08/29/2024	08/29/2024	Technology Fee	92.00
2024 Spring Semester	08/29/2024	08/29/2024	Student Health Service Fee	190.00
2024 Spring Semester	08/29/2024	08/29/2024	Tuition	4,251.00

OK

Cancel

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Student Finance feature at-a-glance

---

## New Student Waiver Experience

JIRA STUFIN-29916, STUFIN-34813

Setup effort Automatically available

Change impact Enables institutions to more accurately assign and manage effective-dated waiver assignments

---

## Student Payment Precedence Charge Item Selection

JIRA STUFIN-30892

Setup effort Automatically available

Change impact Reduces payment precedence maintenance when you add new charge items

---

## Cancel Charges for Academic Period

JIRA STUFIN-35811

Setup effort Automatically available

Change impact Reduces the risk of errors by enabling bulk cancellation of a student's charges for an academic period

# Student Records

# Presented by



Meghan Arias

Principal Consultant

# Course Waitlist Policy Configurations

Workday adds additional configuration options when you create and edit course waitlist policies

## Reasons to consider this feature

- When you configure Workday to send waitlist promotion notifications to students with registration restrictions, you provide them with an opportunity to resolve their restrictions and register for the courses that they need. By enabling students to independently resolve their registration issues first, Workday reduces manual effort for you
- Additionally, Workday also reduces manual effort for you when you configure how Workday should manage students who don't respond to waitlist promotion notifications

## What do I need to do

- Automatically available

<https://doc.workday.com/release-notes/en-us/stureg/8628615.html>

# Course Waitlist Policy Configurations, cont.

Workday adds additional configuration options when you create and edit course waitlist policies

## What happens if I do nothing

- If you do nothing, Workday continues to manage waitlisted students based on your existing course waitlist policies. Policies configured with Auto Promotion will prevent students with registration restrictions from receiving waitlist promotion notifications by default
- Policies configured with Expiration will enable waitlist promotion notifications for students with registration restrictions

## Additional considerations

- Policies configured with Expiration automatically enables waitlist promotion notifications for students with these registration restrictions:
  - Duplicate registration exists
  - Enrollment unit maximum
  - Incomplete cluster registration
  - Require corequisite
  - Repeat attempt limit exceeded
  - Time conflict

<https://doc.workday.com/release-notes/en-us/stureg/8628615.html>

# Course Waitlist Policy Configurations demo

## Current waitlist options

### Display Option

Display Waitlist Position

### Waitlist Method

- Auto Promotion
- Expiration

### Waitlist Expiration

Hours

Waitlisted student that is eligible to register will have 24 hours to respond to notification. After the expiration time, the student will no longer be able to take registration action and it will move on to the next student on the waitlist.

Enable Waitlisting Into Open Course Sections

## New waitlist options

### Display Option

- Display Waitlist Position
- Include Total

### Waitlist Promotion Method

#### Students Eligible for Course Registration

- Auto Promotion
- Expiration

#### Students with Registration Restrictions

- Never Notify
- Notify if they have these restrictions:

- Enrollment Access
- Enrollment Unit Maximum
- Hold
- Time Conflict

### Waitlist Expiration

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Course Waitlist Policy Configurations demo

## Restriction options

- Duplicate Registration Exists
- Eligibility
- Enrollment Access
- Enrollment Unit Maximum
- Hold
- Incomplete Cluster Registration
- Repeat Attempt Limit Exceeded
- Require Co-Requisite
- Time Conflict

Search 

Restrictions

## Waitlist expiration options

### Hours Until Expiration

### After Notification Expires

No Change to Waitlist Position 

select one

- No Change to Waitlist Position
- Moved to End of Waitlist
- Removed from Waitlist

Student will have 72 hours to respond to the notification based on the registration restrictions you select



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Custom Help Text on Registration Waitlist Availability Business Process

Workday displays custom help text instead of Workday-delivered help text

## What's changing

- This enables you to provide students with information that's most relevant to your institution's policies and processes, helping them resolve course registration problems more easily

## What do I need to do

- To display custom help text to students on the Registration Waitlist Availability Event business process:
  - Add Configure Waitlist Advancement as a step on the business process
  - From the related actions menu of that step, select Business Process > Maintain Step Help-Text

<https://doc.workday.com/release-notes/en-us/stureg/8742384.html>

# Custom Help Text on Registration Waitlist Availability Business Process, cont.

Workday displays custom help text instead of Workday-delivered help text

## What happens if I do nothing

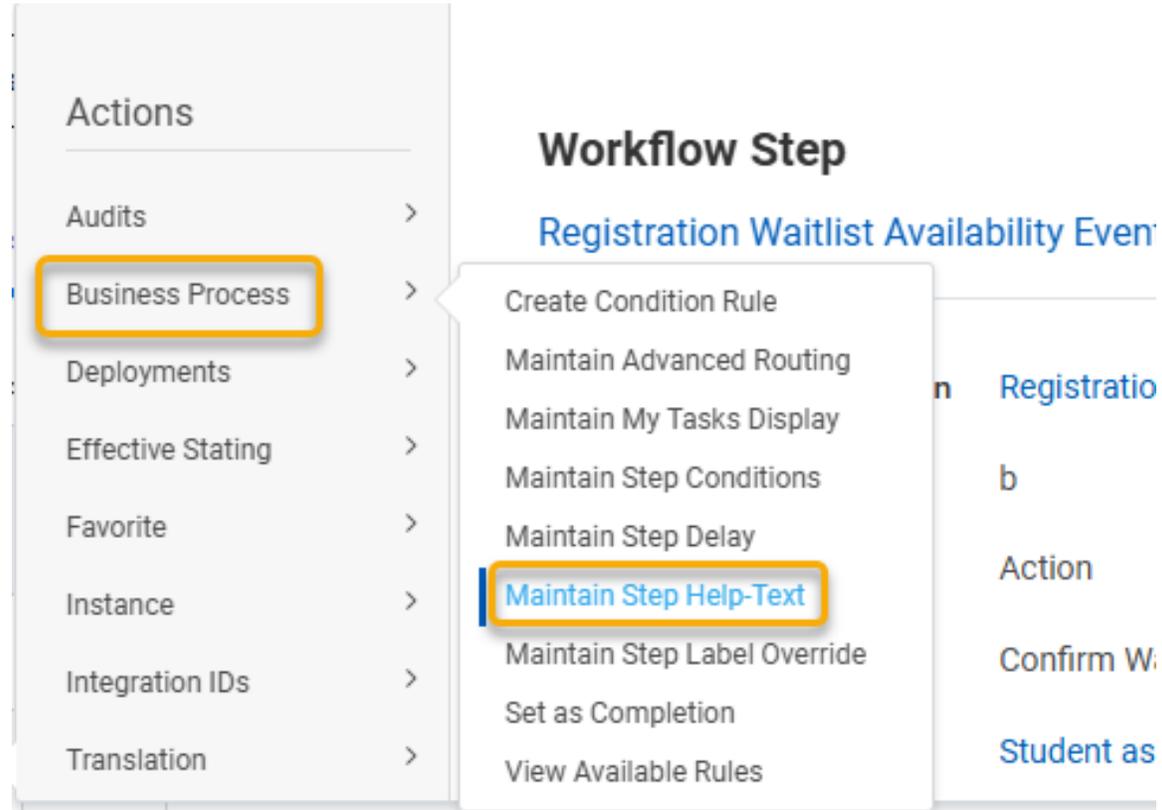
- Workday continues to display the Workday-delivered help text to students when they view the Registration Waitlist Availability Event business process

## Additional considerations

<https://doc.workday.com/release-notes/en-us/stureg/8742384.html>

# Custom Help Text on Registration Waitlist Availability BP demo

Maintain step help-text from BP



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Custom Help Text on Registration Waitlist Availability BP demo

## Help text options

The image displays three screenshots of a system interface, each with a blue arrow pointing to the 'Page Name' field. The screenshots show a table configuration for help text options.

**Page Name: Event Expiration**  
0 items  
Table columns: (+), Display Order, Condition, Help Text  
Status: No Data

**Page Name: Confirm Waitlist Advancement**  
1 item  
Table columns: (+), Display Order, Condition, Help Text  
Row 1: (+), (-), ▼ ▼, [Empty Condition Field], Your help text for Waitlist Advancement here

**Page Name: Registration Holds**  
1 item  
Table columns: (+), Display Order, Condition, Help Text  
Row 1: (+), (-), ▼ ▼, x Student has Active Financial Hold ..., Please contact Student Accounts at 555-867-5309 or [pleasepay@university.com](mailto:pleasepay@university.com) for assistance resolving your hold.

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Custom Help Text on Registration Waitlist Availability BP demo

## Waitlist hold notification

Q Search: All Items 

 [Advanced Search](#)

 - **Sample Course:** 02/19/2025 

**Course Opening Available**

Due: 02/24/2025

### Hold Preventing Registration

You have a financial hold. Please contact Student Accounts at 555-867-5309 or [pleasepay@university.com](mailto:pleasepay@university.com) for assistance.



Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Custom Help Text on Registration Waitlist Availability BP demo

## Waitlist advancement notification

### Confirm Waitlist Advancement

Your help text for Waitlist Advancement here

Waitlist Offer Expires 02/20/2025, 9:12 AM PST

1 item

Course Section	Instructional Format	Meeting Patterns	Instructors
MAACT 123-1 - Sample Course	Lecture		

Remove From Waitlist

## Register from waitlist

Select Course Sections

Drop Registered Courses

+ Add Course

View

Sample Course  
3 Units

Course Listing - Sample Course

Description

Eligible

### Lecture

1 item

Select	Section	Eligible	Section Status
<input checked="" type="checkbox"/>	Sample Course	<input checked="" type="checkbox"/>	Open (Promoted)

Submit

Deny

Cancel

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Roll Over Academic Period Registration Appointments

You can now roll over existing registration appointment configurations from 1 academic period to another

## Reasons to consider this feature

- This enables you to configure registration appointments for upcoming academic periods more efficiently and with fewer clicks

## Additional considerations

- Remember to update the dates if you roll over from a prior like period (e.g. Fall 2024 to Fall 2025)

## What do I need to do

- Automatically available

<https://doc.workday.com/release-notes/en-us/stureg/8365560.html>

# Roll Over Academic Period Registration Appointments demo

## Select a period to roll over

Maintain Academic Period Registration Appointments ✕

---

**Choose What to Configure**

Academic Unit / Academic Level

Program of Study

Academic Unit \*

Academic Level \*

Academic Period \*

**Roll Over Registration Appointments From**

Start Date 03/31/2025 12:00 AM

End Date 12/15/2025 12:00 AM

Cancel OK

## Remember to update the dates if using past period

Maintain Academic Period Registration Appointments ⌵

---

Academic Period **2025 Fall Semester**

Academic Unit

Academic Level Undergraduate

Enrollment Window Start Date 03/31/2025 12:00 AM

Enrollment Window End Date 12/15/2025 12:00 AM

Time Zone GMT-08:00 Pacific Time (Los Angeles)

Enrollment Appointments 8 items

	*Start Time	End Time
+		
-	04/04/2024 12:00 AM	
-	04/05/2024 12:00 AM	
-	04/06/2024 12:00 AM	
-	04/07/2024 12:00 AM	

Fictional information displayed. For illustrative purposes only. Actual screens may vary.

# Student Records features at-a-glance

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## Course Waitlist Policy Configurations

JIRA	STUREG-2310
Setup effort	Automatically available
Change impact	Confirm desired restrictions are configured to send notification and review relevant training materials

---

## Custom Help Text on Registration Waitlist Availability Business Process

JIRA	STUREG-11119
Setup effort	Set up required
Change impact	Set up help text and review relevant training materials

---

## Roll Over Academic Period Registration Appointments

JIRA	STUREG-9621
Setup effort	Automatically available
Change impact	Review relevant training materials

# Next steps



**Reminder:** This content along with the Q&A will be made available to you after the webinar



**Reminder:** We value your feedback; please complete the post-webinar survey

Contact your **Cognizant Engagement Manager** for additional support with:



**Managing the release**



**Building or updating your strategic roadmap**



**User adoption and change management**

# Thank you

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