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Top Student features review

Workday 2025R1

6 March 2025

Your hosts

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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
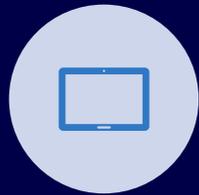
All lines will be muted for today's webinar

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

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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

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Your team of experts

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Admissions

Presented by

April Perdomo

Consultant

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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
		Maintain Step Conditions
Effective Stating	>	Maintain Step Delay
Favorite	>	Set as Completion

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:

  o **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.

  o **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

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

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Admissions Features at-a-glance

Delay Student External Account Creation

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

Transfer Credit Evaluation

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

Transfer Credit Rules

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

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Student Core

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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

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Course Section Capacity demo
Course Section Definition – Administrative View

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

Course Section Capacity demo
Course Section Report – Public View

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

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

Military Documents demo

Documents Category added for Military Documents in student profile

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

Edit

Personal

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)

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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
Military Doc example.jpg	Military Documents	Military Service (Student)		02/21/2025 12:28:01 PM
Military Doc example.jpg	Military Documents	Military Service (Student)		02/19/2025 10:46:35 AM

Student | Alma Mater University
Actions

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

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

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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
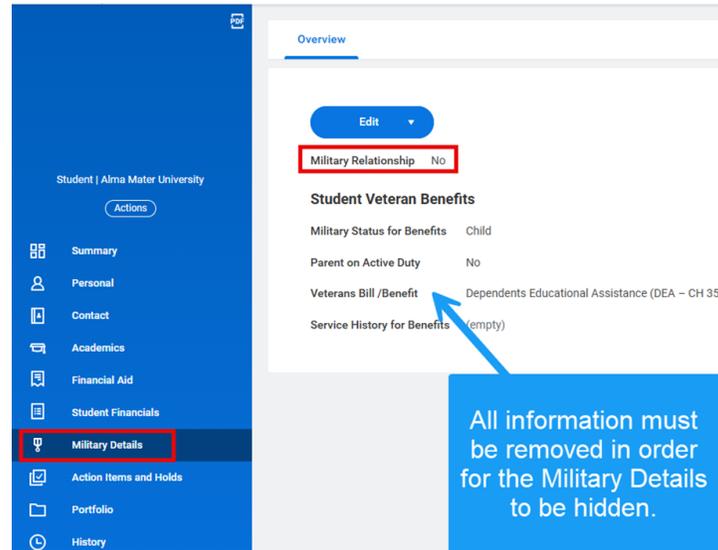
Military Details is now hidden

All information must be removed in order for the Military Details to be hidden.
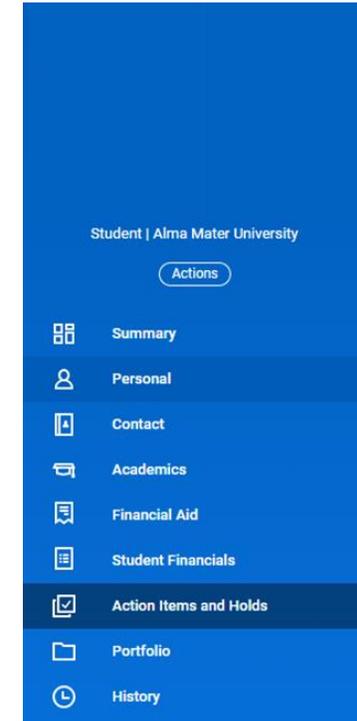
Student Core features at-a-glance

Course Section Capacity

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

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

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Advising

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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

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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

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

Academic Progress Report demo, cont.

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

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

Advising Features at-a-glance

Academic Progress Evaluation for Future Effective- Dated Programs of Study

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

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Presented by

Michael Birchett

Principal Consultant

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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

- ○ Adoptive Parent
- ○ Other
- ○ Parent
- ○ Spouse of Parent or Adoptive Parent

Search

Credit Requirements Met

Relationship to Student

Endorser Approved ☐

School Credit Balance Option ☐
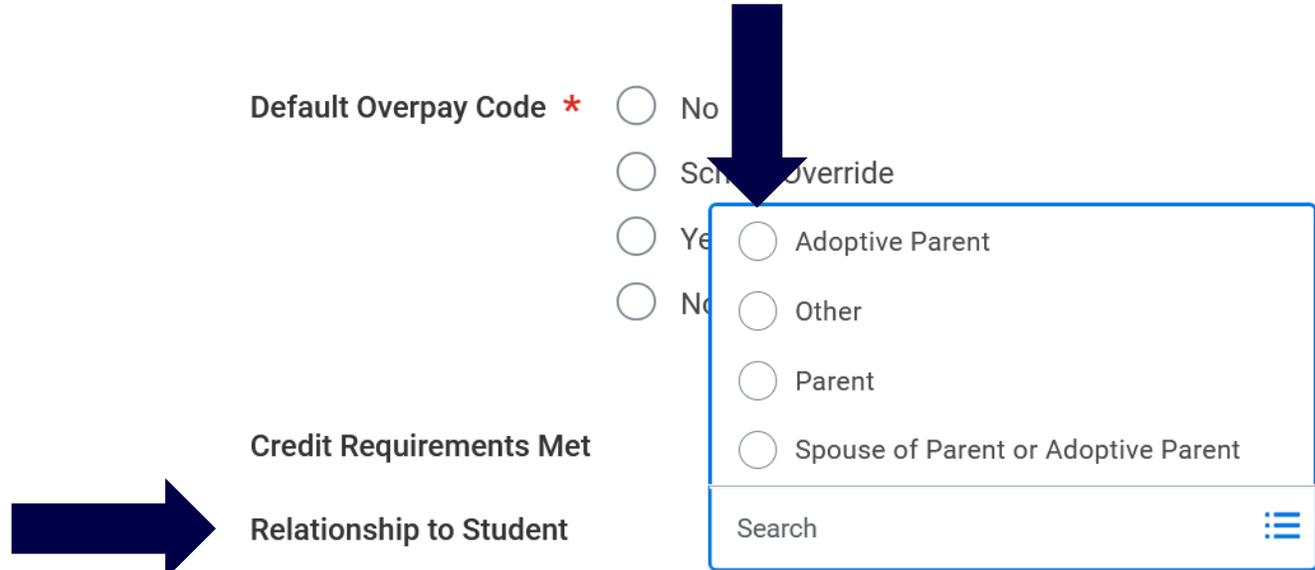
Reconsideration Eligible ☐

Original Credit Decision Status
- ○ Approved
- ○ Denied
- ● None of the above

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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

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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	
Institution	Alma Mater University
Academic Period	2024 Spring Semester
Total Institutional Charges	$0.00
Institutional Charges Earned	$0.00
Return Deadline	02/22/2

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

Submit   Cancel

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

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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 ★   `01/08/2024` 📅

Date of Determination   `MM/DD/YYYY` 📅

🔵 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

Submit   Cancel

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

Submit   Cancel

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

Percentage Earned

Withdrawal Date *   01/08/2024 📅

Date of Determination   MM/DD/YYYY 📅

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

Manual Input

Percentage Earned % *   18

enter your comment

Submit   Cancel

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.

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Action Items: Added Flexibility with Assigning Holds for BPs demo

Create Student Hold Reason

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
Service	Assign Action Item

Apply Student Hold Configuration

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

Configure Remove 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
Student	
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	
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	Apply: Need Packaging - Verification Hold

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

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Student Finance

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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

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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 Assignment

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

Student Waiver Assignment demo
Create Student Waiver Item Rule

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

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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

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Payment Precedence Group demo

Individual Charge Item Selection

	Order	Charge Type	Charge Item Exclusion	Charge Item Inclusion	Charge Item Exclusion Removed by Conversion
⊕					
⊕ ⊖	▼ ▼			✕ International Student Deposit	
⊕ ⊖	▲ ▼	✕ Tuition		✕ Online Course Fee	
⊕ ⊖	▲ ▼	✕ Mandatory Fees	✕ Online Course Fee / ✕ Academic		
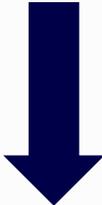
Fictional information displayed. For illustrative purposes only. Actual screens may vary.

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

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Cancel Charges for Academic Period demo
Cancel and Reassess Student Charges

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

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Student Records

Presented by

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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

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

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Course Waitlist Policy Configurations demo

Current waitlist options

Display Option

Display Waitlist Position ☐

Waitlist Method

○ Auto Promotion
● Expiration

Waitlist Expiration

Hours [24]

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 ≣

Waitlist expiration options

Hours Until Expiration

72

After Notification Expires

No Change to Waitlist Position ▼

select one

No Change to Waitlist Position

Moved to End of Waitlist

Removed from Waitlist

trictions

n will have 72 hours to respond to the notifica
sed 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
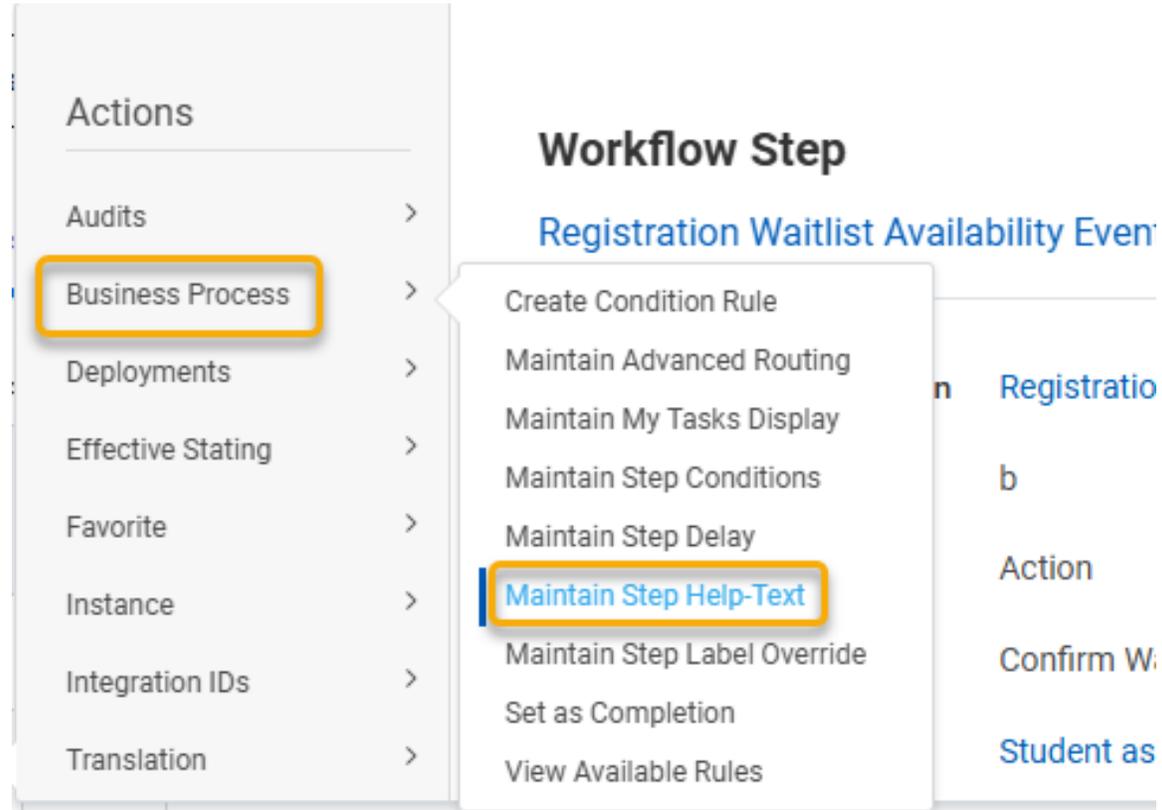
Fictional information displayed. For illustrative purposes only. Actual screens may vary.

Custom Help Text on Registration Waitlist Availability BP demo

Help text options

Page Name   Event Expiration

0 items

⊕	Display Order	Condition	Help Text
		No Data	

Page Name   Confirm Waitlist Advancement

1 item

⊕	Display Order	Condition	Help Text
⊕ ⊖	▼ ▼		Your help text for Waitlist Advancement here

Page Name   Registration Holds

1 item

⊕	Display Order	Condition	Help Text
⊕ ⊖	▼ ▼	✕ Student has Active Financial Hold (•••)	Please contact Student Accounts at 555-867-5309 or pleasepay@university.com for assistance resolving your hold.

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

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Custom Help Text on Registration Waitlist Availability BP demo
Waitlist hold notification

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

Sample Course
3 Units

Course Listing ▢ - Sample Course

Description

Eligible ☑

Lecture

1 item

Select	Section	Eligible	Section Status
☑	Sample Course	☑	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

Remember to update the dates if using past period

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

Student Records features at-a-glance

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

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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

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Thank you

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