

## Expiring State Tax Elections Report for Exempt Workers

**Step 1:** Search for the “Pay | Expiring Exempt Tax Elections” report in Workday

- **Report:** Pay | Expiring Exempt Tax Elections
- **Include MSRR Exempt:** (Leave blank)
- **Tax Authority Type for Expiring Exempt:** State
- **As of Date:** Today’s date
- **Company:** (Your Agency)
- **Tax Authorities:** Oregon
- **Include Terminated Workers:** leave unchecked
- **Select:** “OK” to run the report

**PAY | Expiring Exempt Tax Elections** ✕

---

Include MSRR Exempt

Tax Authority Type for Expiring Exempt

As Of Date \*

Company

Tax Authorities \*

Include Terminated Workers

---

**Step 2:** On the report, filter the “Effective Date” column

**Filter Condition:** is on or before

**Value:** 12/31/24

**Select:** “Filter”

The screenshot shows a software interface for filtering a report. At the top, the report title is "PAY | Expiring Exempt Tax Elections". Below the title, there is a "Details" section. The report is used to identify exempt W-4s. The table has 3 of 4 items. The columns are Company, Worker, Employee ID, Company, Tax Authority, and Effective Date. The filter is applied to the Effective Date column. The filter condition is "is on or before" and the value is "12/31/2024". There are "Filter" and "Remove Filter" buttons.

**Step 3:** Once filtered you will see every employee that needs to update their Oregon W-4 exempt status by Feb. 17, 2025. Failure to do so will result in an automatic change to the default of Single and Zero.

Workday plans to do the mass default for Federal and State (Oregon) on the morning of Feb. 18, 2025. If payroll offices want to see the pay results of the change, they will need to recalculate or wait until Feb. 17, 2025, after the nightly recalculation. Out of State requirement to follow at a later time.