

### Payroll Document Type Overview:

DAS Workday in coordination with Agency Payroll Advisors developed a list of payroll document types that were added to Workday as part of the April 2025 Change Advisory Board (CAB) Release. The New Document Category Names identified in this spreadsheet are now in Workday. We have also created a new Help Article for specialized roles that details the steps to upload a document to a worker profile. The Workday Worker Document PDF was also updated to include all of the new benefits and payroll document types detailed below.

**Workday Worker Document :** <https://www.oregon.gov/das/HR/Documents/Workday-Worker-Document.pdf>

New Document Category Name	Description	File Type
PEBB	Enrollment, mid-year and other correspondence that reference the employee's PEBB benefits. PEBB arrears, Deceased Standard Ins. Standard Insurance Waiver for LT ST Leave is something that will need to be uploaded.	Benefits
PERS	PERS corrections, contributions, correspondence, status checks	Benefits
Time off / Leave	Extended, Intermittent, Paid Leave, Protected - fill out Paid Leave form (CHRO website) best practice	Benefits
Unemployment	Wage verification, Frances	Benefits

Financial Institution	Direct deposit, banking correspondence - redact account #	Payroll
Final Pay	Calculations, correspondence	Payroll
Other Deductions	OSGP, union dues, food drive, Accounting check MARA	Payroll
Other Pay	Payouts, reimbursements, per diems, underpayments, pay advance	Payroll
Overpayments	Repayment agreements, correspondence, calculations	Payroll
Seasonals	onboarding, offboarding	Payroll
Tax related	W-4, W-2, tax authority correspondence	Payroll
Wage Withholding	Garnishments, child support, tax levies	Payroll

Steps below can be viewed in the Workday Help Article: <b>Add Worker Document</b>		
Help Article link:		<a href="https://wd5.myworkday.com/oregon/email-universal/inst/25755\$1950/rel-task/2998\$40834.html#d">https://wd5.myworkday.com/oregon/email-universal/inst/25755\$1950/rel-task/2998\$40834.html#d</a>
Step	Description	Resource
1	Pull up the employee by name in Workday	Help Article: Elevated Roles - Document Upload
2	Select "Personal" from the left hand menu	
3	Select "Documents" from the options across the top	
4	Click "Add" button and this will allow you to select the file you want to upload from your computer	
5	Select files to upload	
6	Click Upload to load additional files	
7	From "Document" drop down select the Payroll or Benefit Category that you want for the file that will be uploaded	(Worker Doc Type Worksheet link as resource)
a	Payroll Partners will see the Benefit/Payroll Categories listed above	
8	Click OK	
9	Click Done	

New Document Category Name		Description	File Type	Is this document likely part of the Official Personnel file? (Payroll file)	Is this personnel record exempt from public disclosure?	Most applicable retention schedule under State laws	Data Classification Level	Role that can view ONLY	Roles that can view, modify, or remove (an audit trail would remain)
PEBB		Enrollment, mid-year and other correspondence that reference the employee's PEBB benefits. PEBB arrears, Deceased Standard Ins. Standard Insurance Waiver for LT ST Leave is something that will need to be uploaded.	Benefits	Yes	Likely	5 years after separati	Level 2	N/A	Agency Payroll Partner
PERS		PERS corrections, contributions, correspondence, status checks	Benefits	Yes	Likely	75 years	Level 2	N/A	Agency Payroll Partner
Time off / Leave		Extended, Intermittment, Paid Leave, Protected - fill out Paid Leave form (CHRO website) best practice	Benefits	Yes	Likely	5 years after separati	Level 2	N/A	Agency Payroll Partner
Unemployment		Wage verification, Frances	Benefits	Yes	Likely	5 years after separati	Level 3	N/A	Agency Payroll Partner, HR Business Partner
Financial Institution		Direct deposit, banking correspondence - redact account #	Payroll	Yes	Likely	7 years after separati	Level 3	N/A	Agency Payroll Partner
Final Pay		Calculations, correspondence	Payroll	Yes	Likely	75 years	Level 3	N/A	Agency Payroll Partner
Other Deductions		OSGP, union dues, food drive, Accounting check MARA	Payroll	Yes	Likely	5 years after separati	Level 2	N/A	Agency Payroll Partner
Other Pay		Payouts, reimbursements, per diems, underpayments, pay advance	Payroll	Yes	Likely	5 years after separati	Level 2	N/A	Agency Payroll Partner
Overpayments		Repayment agreements, correspondence, calculations	Payroll	Yes	Likely	5 years after separati	Level 2	N/A	Agency Payroll Partner
Seasonals		onboarding, offboarding	Payroll	Yes	Likely	5 years after separati	Level 2	N/A	Agency Payroll Partner
Tax related		W-4, W-2, tax authority correspondence	Payroll	Yes	Likely	5 years after separati	Level 3	N/A	Agency Payroll Partner
Wage Withholding		Garnishments, child support, tax levies	Payroll	No	Likely	5 years after separati	Level 3	N/A	Agency Payroll Partner