Create Eligibility Rules

STAFF

Workday Student

This tip sheet is intended for staff building eligibility rules.

Eligibility rules identify a specific population of prospects or students for use in a variety of functions and workstreams within Workday. For example, these may affect the ability to register for course sections or may list a specific requirement for graduation.

To build eligibility rules effectively, follow these key steps:

1. From Workday, navigate to the **Create Student Eligibility Rule** task.
2. Select **Rule Type**. Choose from available rule types based on your needs. Common types include (not an exhaustive list):
   - **Test Achievement Rule**: Eligibility based on test scores.
   - **Combination Rule**: Use when a rule requires multiple criteria.
   - **Course requirement**: Used when a specific course (or courses) is required to satisfy the condition.
   - **Credit hour requirement**: Used when a specific number of credit hours is required to satisfy the condition.
   - **Grade**: A minimum GPA satisfies the condition.
   - **Student Cohort**: Sets eligibility based on cohort membership.
3. Follow consistent naming conventions for clarity. Include date references and use clear identifiers for subrules.
   - For Curriculum Management examples, see **Find Student Eligibility Rules** report for examples.
4. Select the **Academic Unit.** Rules should be set at the highest applicable academic unit so that subordinate units can inherit the rule.
5. (If necessary) select the **Academic Level.**
6. Set the eligibility criteria. The logical conditions that define eligibility or the satisfaction of a requirement will vary by the rule type selected above. Complete all required fields.
7. Review the Meaning of the rule. If the meaning is not clear, you may click the **Custom Eligibility Rule Meaning** and enter the meaning accordingly.
8. After defining the eligibility criteria, select **OK** to submit the new rule to make it active.

9. Maintain clear documentation of the rules for future reference and updates.