ONBOARDING
INSTRUCTIONS AND INFORMATION

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The purpose of this job aid is to provide a new Employee with guidance on how to complete the onboarding process in Workday. However, the experience shown here is only a sample of what an Employee might typically encounter. Onboarding is a process that varies depending on the position and characteristics of the worker hired. Not every Employee will see everything shown in this job aid.
If you have questions on any part of this process, refer to the Additional Resources tab for instructions on how to reach out to your Human Resources department.

IMPORTANT INFORMATION

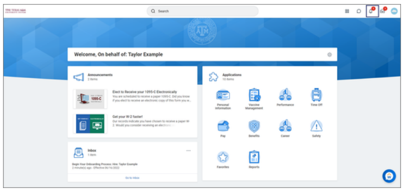
- Complete each group of tasks in your inbox in the order they are presented to you and do not submit tasks until you have received the prompt from Workday.
- Not submitting items in your inbox for onboarding in a timely manner can have negative impacts.
- Not every Employee will receive the exact same tasks in Workday because situations vary. For example, if you are not benefits eligible, benefit tasks will not appear in your inbox.
- Depending on whether your member has elected to participate in export control related processes, additional steps may be required.

GETTING STARTED

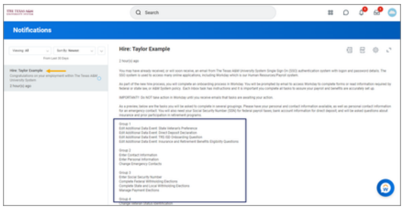
You will receive a notification that your onboarding has begun. To review this notification follow the steps provided below.

Click on images to enlarge.

- Select the **Bell** icon in the top right corner of the screen to view your notifications.



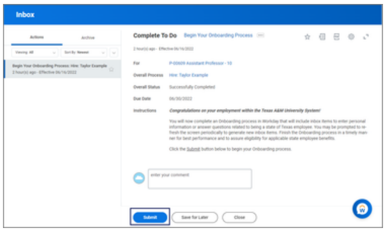
- Select the **Hire** notification and review the instructions for the onboarding process.



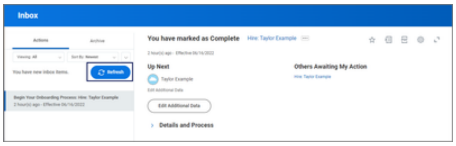
ONBOARDING BEGINS

Onboarding tasks are split into four groups of tasks. The Employee completes each task one at a time. Once the entire group of tasks is complete, the next group of tasks will appear.

- To get started, navigate to your Workday inbox and select the **Begin Your Onboarding Process** task. After reading the information provided, select **Submit** to begin the onboarding process.



- Refresh your inbox by selecting **Refresh.** Group 1 onboarding tasks display.

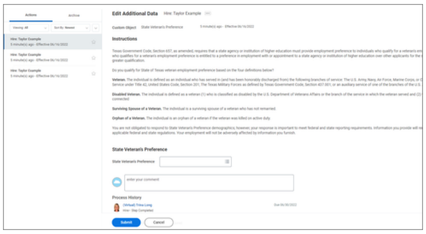


GROUP 1 TASKS

Group 1 onboarding tasks prompt you to answer various questions. These tasks are received automatically once the onboarding process has started. All Employees will see these three tasks: **State Veteran's Preference**, **Direct Deposit Declaration** and **TRS ISD Onboarding Question**. Those Employees hired into a Benefits eligible position will also receive the task: **Onboarding Benefits Questions.**

STATE VETERAN'S PREFERENCE

- Navigate to your inbox and select the first **Hire** task for selecting the **Employee's State Veteran Status.**
- Read the instructions. Then select whether or not you are a state veteran in the **State Veteran's Preference** field.
- Enter any comments, as needed.
- Select **Submit** to continue to the next task.



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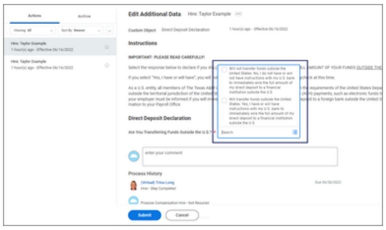
DIRECT DEPOSIT DECLARATION

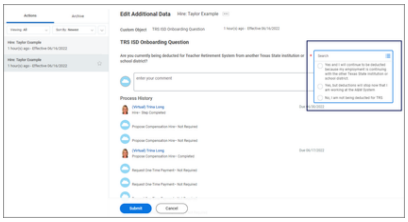
- On the next task **Direct Deposit Declaration**, enter whether or not you will be transferring funds outside of the U.S. with your direct deposit in the **Are you Transferring Funds Outside the U.S.** field.

  ***Note**: You will not be able to enroll in direct deposit if you are transferring funds outside the U.S.*
- Select **Submit.**



TRS ISD ONBOARDING STATUS

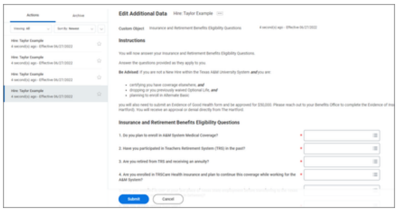
- On the next task, select your **TRS ISD Onboarding Status.**
- Select **Submit.**



ONBOARDING BENEFITS QUESTIONS

- On the next task **Insurance and Retirement Eligibility Questions**, answer the questions related to your benefits eligibility.

  ***Note**: This task only appears in your inbox if the position you have been hired for is eligible for benefits.*



- Select **Submit.**
- Once the last Group 1 task is submitted, select **Refresh** to generate Group 2 tasks.

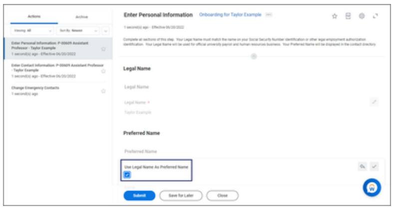
GROUP 2 TASKS

Group 2 tasks will initiate after all Group 1 tasks have been completed. Group 2 tasks will prompt you to enter your

- **Personal Information**
- **Setup your contact information**
- **Enter your emergency contact information**

ENTER PERSONAL INFORMATION

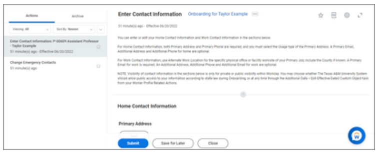
- Access your inbox and select **Enter Personal Information** task.
- In the Preferred Name section of the task, select the **Use Legal Name As Preferred Name** check box.
- Enter the remainder of your personal information in the Change Personal Information section.
- Select **Submit.**



ENTER CONTACT INFORMATION

- Select the **Enter Contact Information** task in your inbox.

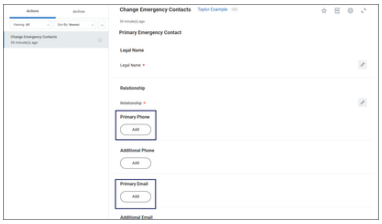
  Note: *The **Usage** field in the Home Contact Information is required, but not marked as such.*
- Enter the required contact information as necessary.
- Select **Submit.**



CHANGE EMERGENCY CONTACTS

- Select the **Change Emergency Contacts** task in your inbox.
- Enter information for your primary emergency contact as required.

  Note: *You must enter either a phone number or email address for at least one emergency contact.*
- Select **Submit.**
- Once the last Group 2 task is submitted, select **Refresh** to generate Group 3 tasks.



GROUP 3 TASKS

Group 3 onboarding consists of the following tasks:

- **Enter Social Security Number**
- **Complete Federal Withholding Elections**
- **Manage Payment Elections**
- **Complete State and Local Withholding Elections** (if in a state that collects income tax).

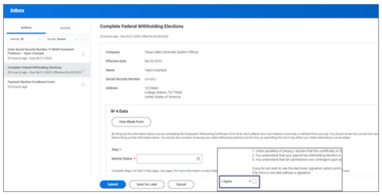
ENTER IN SOCIAL SECURITY NUMBER

- Access your inbox and select the **Edit Government IDs** tasks.
- Enter your social security number by selecting the **Plus Sign (+)** icon in the National IDs section and then selecting **Social Security Number** in the **National ID Type** field.
- Select **Submit** after entering your social security number.

COMPLETE FEDERAL WITHHOLDING ELECTIONS

- On the **Complete Federal Withholdings** tasks, select your marital status and enter your withholding information as required.
- Select the **I Agree** check box.
- Select **Submit.**

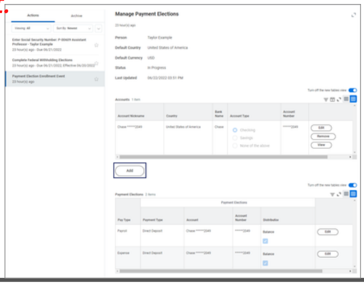
***Note**: If you entered an address for a state that collects income tax, an additional task to **Complete State and Local Withholding Elections** will appear.*

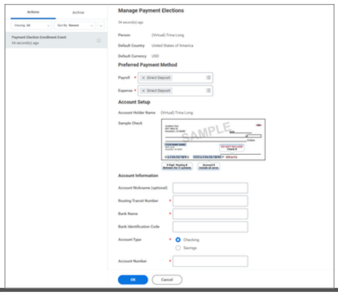


MANAGE PAYMENT ELECTIONS

- On the **Payment Election Enrollments** task, enter the the following information:
  - **Payroll** - This will default to **Direct Deposit** but you can elect to have a check.
  - **Expense** - This will default to **Direct Deposit** but you can elect to have a check.
  - **Account Nickname** - This field is optional but it is best practice add one (e.g. Personal Account).
  - **Routing Transit Number** - This number is located on the bottom of your check or is available from you banking information online.
  - **Bank Name** - Enter the name of your bank (e.g. Chase)
  - **Bank Identification Code** - Ignore this field.
  - **Account Type** - Select Checking or Savings.
  - **Account Number** - This number is located on the bottom of your check or is available from you banking information online.

    ***Note:** You can add additional bank accounts using the **Add** button that displays after confirming your first account.*
- Select **Submit.**





COMPLETE STATE AND LOCAL WITHHOLDING ELECTIONS

If you entered an address for a state that collects income tax, an additional task to **Complete State and Local Withholding Elections** will appear in your inbox.

Once the last Group 3 task is submitted, select **Refresh** to generate Group 4 tasks.

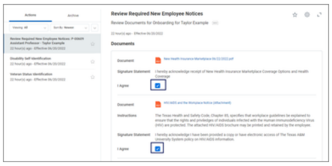
GROUP 4 TASKS

Tasks in onboarding Group 4 will ask you if you self identify as disabled or as a veteran. You will also be required to complete and agree to several new employee notices for various policies. Group 4 onboarding consists of the following tasks:

- **Reviewed Required New Employee Notices**
- **Edit Passport and Visas** (if a foreign national)
- **Complete W-4 in GLACIER and Submit to Payroll** (if a foreign national)
- **Enroll in Electronic W-2**
- **Change Self-Identification of Disability**
- **Change Veteran Status Identification**

REVIEW REQUIRED NEW EMPLOYEE NOTICES

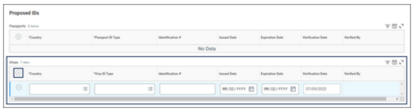
- Access your inbox and select the **Review Required New Employee Notices** task. The information that appears is provided to all new employees.
- Review each notice and select the **I Agree** check box.
- Once all notices have been reviewed and agreed to, select **Submit.**



EDIT PASSPORTS AND VISAS

If you are a foreign national, you will receive the task **Edit Passports and Visas.**

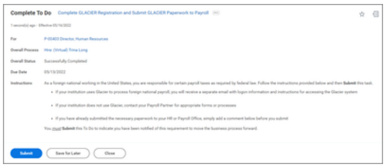
- To add a Visa, select the **Plus Sign (+)** icon under the **Visas** section. In the row that appears, fill in the following fields: **Country, Visa ID Type, Identification #, Issued Date,** and **Expiration Date.**
- Enter any comments, as needed.
- Select **Submit.**



Note: If you are a foreign national, there may be additional tasks to enter your passport and visa information, and complete your GLACIER registration. Complete these tasks as necessary.

COMPLETE W-4 IN GLACIER AND SUBMIT TO PAYROLL

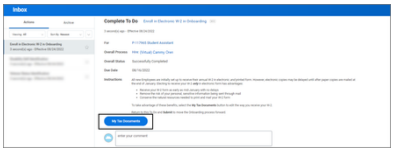
If you are a foreign national, you will also receive the To Do **Complete W-4 in GLACIER and Submit to Payroll.** Follow the instructions on the To DO and then select Submit.



ENROLL IN ELECTRONIC W-2

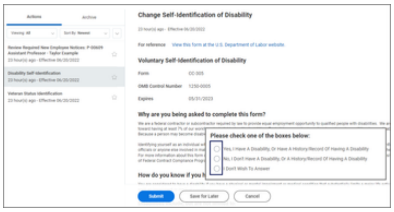
- Select the **Enroll in Electronic W-2** task from your inbox.
- After reviewing the information in the task, select the **My Tax Documents** button to edit the way you receive your W-2.

  ***Note**: Electing to receive your W-2 **only** in electronic form if preferred.*
- Return to your inbox task and select **Submit.**



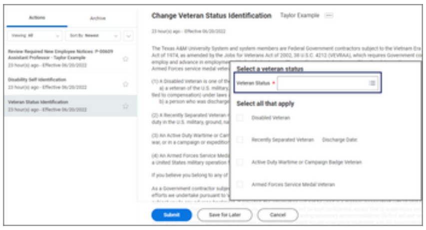
CHANGE SELF-IDENTIFICATION OF DISABILITY

- Select the **Disability Self-Identification** task from your inbox.
- Review the instructions and information included in the task and select the appropriate option.
- Select **Submit.**



CHANGE VETERAN STATUS IDENTIFICATION

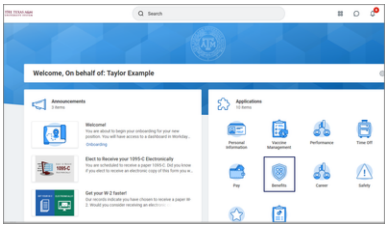
- Select the **Veteran Status Self-Identification** task in your inbox.
- After reviewing the information, select the appropriate option to represent your veteran status.
- Select **Submit.**
- After submitting all Group 4 tasks, you can move on to setting up your benefits elections.



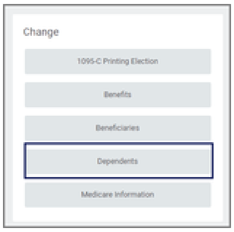
ADD DEPENDENTS

The following steps can be completed once the required Groups 1-4 tasks have been completed. For employees that are eligible for benefits, the following steps can be used to complete your onboarding procedures. If you do not have dependents, proceed to the **Make Your Benefits Elections** section below.

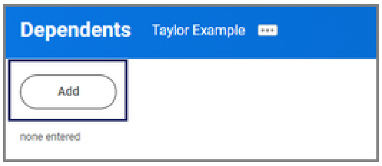
- From your Workday Home Page, select the **Benefits** worklet.



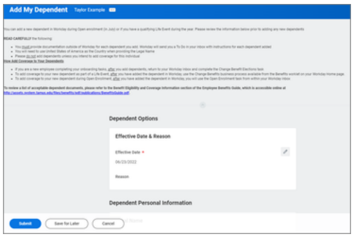
- In the Change section, select **Dependents.**



- Select **Add.**



- In the **Reason** field, select **Add Dependent > New Hire**.



- Enter the required information for the dependent in the corresponding fields and select **Submit**. Once this task is completed, you will receive an additional task to add the required documents to verify your dependents.

Don't forget to click on the images to zoom in!

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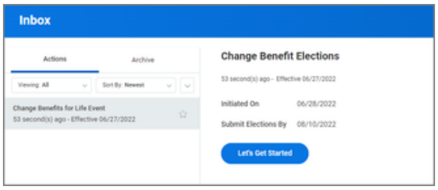
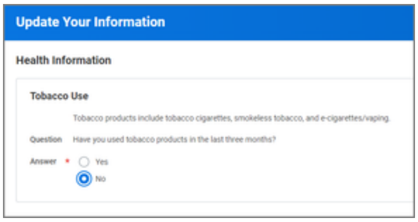
MAKE YOUR BENEFIT ELECTIONS

After you have added your dependents, you can make all the necessary benefits elections.

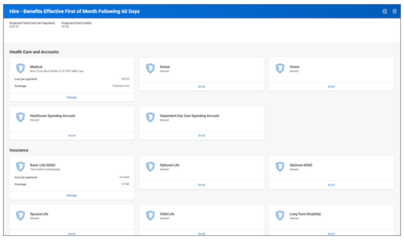
- Access your inbox and select the **Change Benefits for Life Event** task.
- Select **Let's Get Started.**



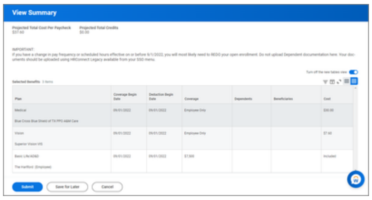
- On the Update Your Information page, select the appropriate answer for your tobacco usage and then select **Continue**.



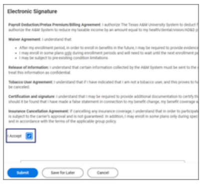
- The next page displays sections for each of the benefits you are eligible for. Select **Enroll/Manage** for the coverage you want to add or change. Each coverage area displays instructions for how to set it up appropriately.



- When you are finished with a specific coverage, select **Continue** to return to the main benefits page.
- Once you have enrolled in all the coverage you need, select **Review and Sign** to continue.
- On the next page, review all of your selected coverages.



- If the elections are correct, scroll down to the bottom of the page and select **I Agree**, then click **Submit**.



After you have submitted your benefit elections, you can review them from the benefits menu at any time. This process may trigger additional notifications once all the steps are completed. Notifications can be viewed by selecting the **Bell** icon in the top right corner.

UP NEXT...

If you have not already, you can complete the online training ***Working in Workday for Employees***, available on TrainTraq for more information on how you will use Workday in your position at your organization. If you are also a Manager, we recommend you also complete ***Working in Workday for Managers*** next.

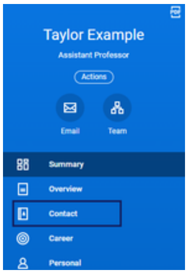
For more information on Workday, visit the Workday Help website. Both TrainTraq and Workday are available on your SSO menu.

This completes the **Onboarding** business process.

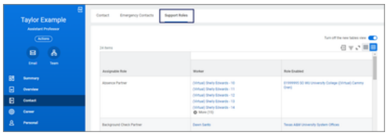
ADDITIONAL RESOURCES

To locate information for your HR contact in Workday, use the following procedure.

- Navigate to your Worker Profile and select **Contact**.



- Select the **Support Roles** tab.



- Scroll down to ***HR Contact*** to find who supports your department for Human Resources needs.