Division of Human Resources
& Organizational Effectiveness

Workday Onboarding Tasks

Employee Tasks – Submitted from Workday Inbox

Log Into Workday

Employees use the login information sent to their email or they can use their NetID

Employees should never make any updates or changes unless they have a specific task in their Workday inbox

Group 1 Tasks

- Privacy Flag
- Direct Deposit Declaration
- State Veteran's Preference
- Onboarding Benefits Questions
- TRS ISD Onboarding Question

Refresh Workday Inbox

Group 2 Tasks

- Personal Information
- Contact Information
- Change Emergency Contacts

Refresh Workday Inbox

Group 3 Tasks

- Enter Social Security Number (May Be Skipped)
- Manage Payment Selections (Direct Deposit)
- Complete Federal Withholding Elections
- Complete State and Local Withholding Elections (If Applicable)

Refresh Workday Inbox

Group 4 Tasks

- Review Required New Employee Notices
- Edit Passports and Visas (if applicable)
- To Do: Complete W-4 in GLACIER and submit to Payroll (If Applicable)
- Change Self-Identification of Disability
- Change Veteran Status Identification (federal veteran status)

Last Task After HR Approvals

- Change Benefits Elections Life Event

Benefits Partner, Absence Partner, and Faculty Partners Complete Final Tasks as needed

HR Contact Receives Final Onboarding Message

HR Professionals should check the Employee's Worker History in Workday to monitor the Onboarding Process. Run the *Onboarding Status Summary* Report in Workday to check the status of multiple employees.

Onboarding Approvals Route To Different HR Partners

Benefits Partner

- To Do: Rescind TRS event
- To Do: Review Insurance and Retirement Benefits Eligibility Questions, SGIP Driver
- TRS9 Date and BARS
- To Do: Review Insurance and Retirement Benefits Eligibility Questions and TRS ISD
- Questions
- To Do: Update Original ORP Start Date
- To Do: Add Medicare Information

Retiree Partner

- To Do: Add a Medical Only Change benefit event for retiree

Payroll Partner

- To Do: Obtain TRS Temporary ID