Workday Onboarding Tasks

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

Group 1 Tasks
- Log Into Workday
- Privacy Flag
- Direct Deposit Declaration
- State Veteran’s Preference
- Onboarding Benefits Questions
- TRS ISD Onboarding Question

Group 2 Tasks
- Personal Information
- Contact Information
- Change Emergency Contacts

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)

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)

Group 2 Tasks
- To Do: Rescind TRS event
- To Do: Review Insurance and Retirement Benefits Eligibility Questions, SGP/Driver
- To Do: TRS90 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

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

Retiree Partner
- To Do: Obtain TRS Temporary ID

Payroll Partner

Refresh Workday Inbox

Onboarding Approvals Route To Different HR Partners

HR Contact Receives Final Onboarding Message

Employee Tasks – Submitted from Workday Inbox

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.