HOW TO

Onboarding Tasks in Workday
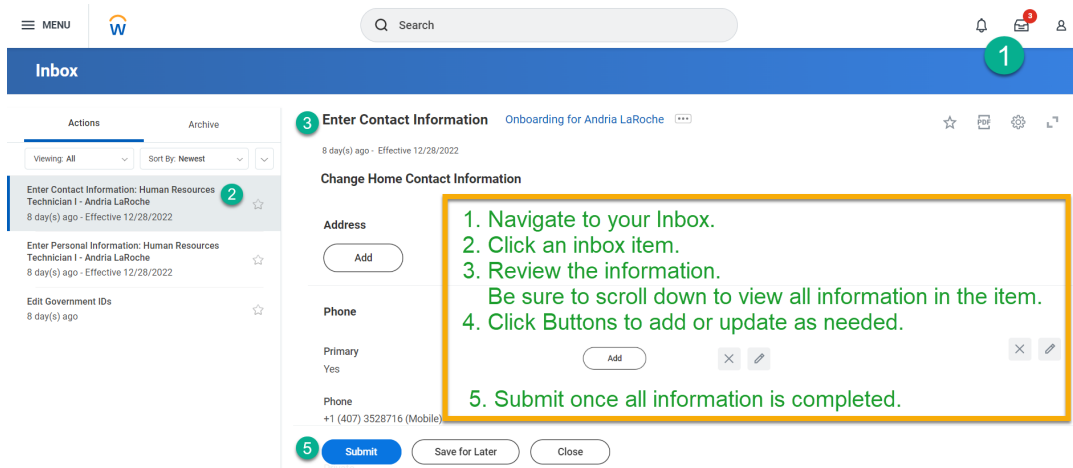*Instructions for New Employees*

Workday
Connecting Progress

Overview

Your onboarding with the City will start in Workday, the City's Human Resources system. This guide will show you how to navigate Workday to access and complete your onboarding tasks.

Onboarding Information

Within Workday, you will be asked to complete the following sets of inbox tasks. Once a set is completed, the next set will be in your inbox.

1. Navigate to your Inbox.
2. Click an inbox item.
3. Review the information.
   Be sure to scroll down to view all information in the item.
4. Click Buttons to add or update as needed.

5. Submit once all information is completed.

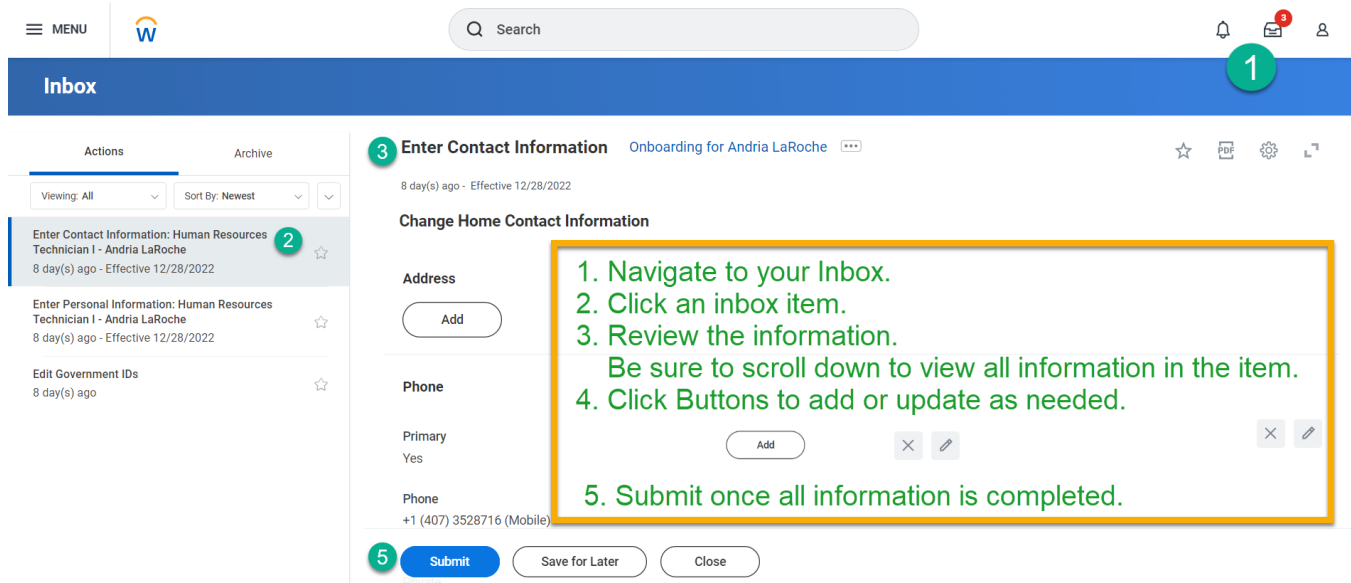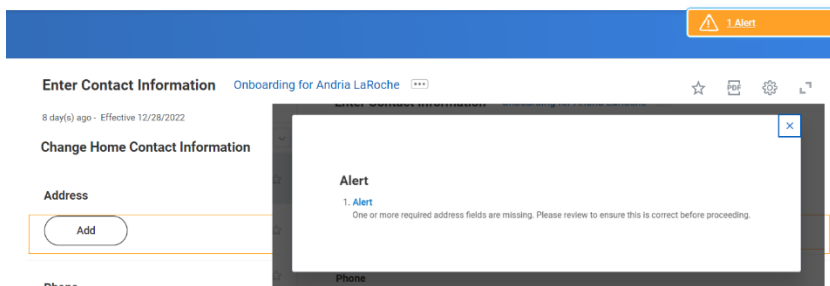| Set 1 – Personal Information	Set 2 – City Information	Set 3 – Payroll	Set 4 – Benefits & Employee Profile
1. **Edit Government ID** (Social Security Number or other National ID)	1. **Complete Conflict of Interest Statement**	1. **Complete Form I-9**	1. **Select Benefits**
2. **Personal Information** (Gender, Date of Birth, Marital Status, Military Status)	2. **Review Documents** (City Policies and Procedures)	2. **Manage Payment Elections** (Direct Deposit for your paycheck)	2. **Complete Talent Review** (Career Profile with past job history, education, work experience)
3. **Contact Information** (Home Address and Phone Number)	3. **Complete Education Verification Questionnaire**	3. **Complete Federal Withholding Elections** (W-4)	
	4. **Add Licenses** (For Positions Requiring It)		
	5. **Add Emergency Contacts**		
	6. **Add Veteran Status**		
	7. **Indicate Preferred Name**		

Log in to Workday

Please check your email for instructions on how to log into your Workday account prior to your first day with the City.

Navigate To Set 1 of Onboarding Tasks

1. In the upper-right corner of Workday, click on your inbox. Image to left is the inbox icon. Image below is full screen of your inbox.

2. The Set 1 items will be in your inbox.

1. Navigate to your Inbox.
2. Click an inbox item.
3. Review the information.
   Be sure to scroll down to view all information in the item.
4. Click Buttons to add or update as needed.

5. Submit once all information is completed.

Click on each task. Review the instructions at the top of each task to ensure you fill everything out accurately. **Note**: To open certain sections for editing, you may need to click the **Pencil** icon in that section.

When finished, click **Submit** at the bottom of the page. You will know you have done this if the task is no longer in your Workday inbox.

If when you click Submit you receive an orange or red notification, click the notification button to identify what information was missed.

Continue to next steps

4. Set 3 will come into your inbox once set 2 is completed.

Set 3 – Payroll		
1. **Complete Federal Withholding Elections** (W-4)	• Red asterisk fields are required. • Other items are optional. • This can be updated throughout the year.	
2. **Complete Form I-9**	• You will bring the documents you entered with you on your first day. • This is a federal form that must be verified within 3 days of your start**.** • Refer to the attachment on the Login email with valid I-9 items.	
3. **Manage Payment Elections** (Direct Deposit for your paycheck)	• Once you've added your bank account information you will receive an inbox task. • **You must upload a copy of your voided check or bank form into this inbox task for payroll to approve**	

After you **submit** these tasks, the following will happen:

• Payroll will review and approve your direct deposit.
• HR will review your I-9.

The final series of onboarding tasks is available in your Workday inbox.
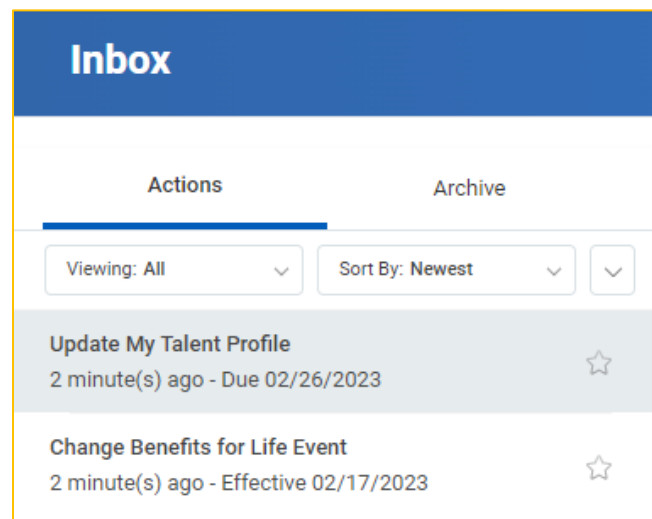
Some tips for completing these tasks:
• Your **Talent Profile** allows you to showcase your past professional accomplishments and work experience. Throughout this task, you will see the **Pencil** icon to open sections for adding information.
• The **Change Benefits for Life Event** task allows you to elect your benefits (medical, dental, life insurance) and assign dependents and beneficiaries to eligible benefits. There will be several steps to this task, but you can always save your progress and return to the task in your Workday inbox.