Onboarding (Hire)

Overview

Onboarding is a dynamic process that varies depending on the worker that has been hired. This process is currently under assessment by a working group and will most likely change in the near future. The following information is focused on the onboarding tasks that are a result of the completion of the **Hire** business process. **Note:** The information presented here is for use by personnel with security roles that work in HR, Payroll and Benefits offices system wide.

Key Points:

- Onboarding triggers when all of the steps of the **Hire** business process are complete

- The time at which the security roles trigger events in Workday will affect how many items are actually landing in the worker's inbox at any given time.

- Not every worker will experience the exact same tasks in Workday because their situations vary. If they are not benefits eligible, benefit tasks will differ and so forth. Some tasks trigger to all employees such as enroll in electronic W-2. This is why it is difficult to capture an experience that will be standard for all new Employees in this guide.

- There are four stages within onboarding. Each stage is dependent on completion of all tasks and To Dos in the previous stage by both security roles (HR Contact, etc.) and the Worker hired.

STAGE 1

First UP! The Employee completes Contact Information and Personal Information tasks

The first two tasks that will initially land in the Worker's inbox are **Enter Contact Information** and **Enter Personal Information**. These tasks can be completed in any order. The Employee needs to read carefully as to what areas require information. Error messages will guide the Employee if something required still needs completion. Not all required areas are marked with a red asterisk. For example, Usage is required for the address entered by the Employee in the Enter Contact Information task but is not marked.

Explore

STAGE 2

Next UP! HR Contact

The HR Contact will receive a To Do providing instructions on how to trigger tasks for the Employee to complete in Workday. The To Do the HR Contact receives depends on whether the Employee is Benefits eligible. Below are the two possible To Dos the HR Contact might receive and the tasks that subsequently trigger to the Employee.

A. *To Do: Trigger Direct Deposit, Privacy Flag, and State Veteran's Preference for Employee (if not benefits eligible)*

If the new Employee *IS NOT* benefits eligible, this is the To Do that the HR Contact receives to complete. The HR Contact will navigate to the Employee's Worker Profile and initiate the Edit Worker Additional Data Event. The effective **Hire** Date should be entered. This will trigger the appropriate tasks to the Employee.

TASKS:

- **Privacy Flag**
- **Direct Deposit Declaration**
- **State Veteran's Preference**

B. *To Do: Trigger Benefits Onboarding Questions, Direct Deposit, Privacy Flag, and State Veteran's Preference for Employee (if benefits eligible)*

If the new Employee *IS* benefits eligible, this is the To Do that the HR Contact receives to complete. The HR Contact will navigate to the Employee's Worker Profile and initiate the Edit Worker Additional Data Event. The effective **Hire** Date should be entered. This will trigger the appropriate tasks to the Employee.

TASKS:

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

The HR Contact will then navigate back to their own inbox in Workday and submit the To Do indicating they have completed the instructions in the To Do. When the HR Contact clicks **Submit**, additional To Dos and Tasks are triggered to the Employee in

Workday. Items marked with "*" are dependent on certain criteria and may not trigger to the Employee if criteria are not met (e.g. **To Do: Add Medicare information** is only for those 65 years and older).

- **Change Emergency Contacts**
- **Veteran Status Identification**
- **Disability Self-Identification**
- **Update Your Education**
- **Verify Prior State Service**
- **Review Required New Employee Notices**
- **Change My Photo**

- **Complete Federal Withholding Elections***
- **To Do: Add Medicare Information***
- **To Do: Complete W-4 in GLACIER and Submit to Payroll***
- **Complete State and Local Withholding Elections***
- **Edit Passports and Visas***

STAGE 3

Additional Security Role Activities

The following tasks / To Dos trigger to the respective security role after all tasks / To Dos for Stage 2 have been completed. The following is in alphabetical order. All of the following trigger at the same time and are not dependent on each other. Remember, not all items listed here will trigger depending on whether the new Employee meets criteria relevant to the To Do or task. For example the Benefits Partner will not receive the To Do: Obtain TRS Temporary ID if the Employee has a social security number or is a student worker.

Absence Partner

- **Employee is a rehire. Do they qualify for restoration of Sick time off?**

  Employee is a rehire

Benefits Partner

- **Rescind TRS event**

  Prompts to rescind the TRS enrollment for employees who already retired from ORP or are enrolled in ORP

- **Review Documents**

  Prompts to review ORP Eligibility Documents

- **Review the answers to onboarding questions**

    Employee is not benefits eligible

- **To Do: Update Original ORP Start Date**

    Employee was previously enrolled at another state agency

- **To Do: Review Benefits Onboarding Questions, SGIP Driver, and TRS9 Date**

    Employee is benefits eligible

Faculty Partner

- **To Do: Update Faculty Tenure Status**

    If the tenure status is unknown at the time of onboarding, the Tenure Status can be set to "N" or left blank. The security role can return to the task at a later date when tenure status is known. This will not hold up the business process

HR Contact / HR Partner

- **To Do: Organization-specific Onboarding Activities**

    Prompts to go through member specific tasks with the new Employee

- **Update Mail Stop**

    Triggers if System Member uses Mail Stops

I-9 Partner

- **To Do: Record Form I-9 Completed in Guardian**

    Prompts to Edit the custom IDs of the Employee. More information on Form I-9 processes is available in the *Form I-9 Processing Quick Reference Guide* on Workday Help

Payroll Partner

- **To Do: Obtain TRS Temporary ID**

    Employee does not have a social security number

Retiree Partner

- **Add a Medical Only Change benefit event for retiree**

    Employee is a retiree that is being actively employed

STAGE 4

Final activities for Both Employee and Security Role personnel

When all tasks / To Dos for Stage 3 have been completed by the security roles outlined above, the following some, or all, of the following will trigger for completion by the Employee:

- **Manage Payment Elections**
- **To Do: Enroll in Electronic W-2**
- **Change Benefit Elections**
- **To Do: Change 1095-C Printing Election**

At this point the Employee has received all Onboarding tasks / To Dos. Once the Employee has completed these items, the following task will trigger to the Absence Partner if applicable

Absence Partner

- **Confirm prior state service, update state service plans and time off service date. Update vacation and sick time offs for any balances being transferred in**

    Employee is transferring form a Texas state agency, college or university

All completed events are fed nightly from Workday to legacy applications such as Datawarehouse and FAMIS