

Onboarding Steps for New Employees

(revised 3/8/19)

Overview

Each step will be an Action item in your Workday inbox. Please read the instructions for each item carefully. Do not click SUBMIT until AFTER you have completed the task(s). The tasks will be sent in 4 groups. ***If you receive an error message when “submitting” your task, click on the ERROR and an explanation of what is needed will be given.**

Group 1

- Enter Contact Information
- Enter Personal Information
- Change Emergency Contacts
- Set Privacy Flag
- State Veteran’s preference
- TRS Question
- Benefits/ Insurance Questions (for benefits-eligible employees)
 - If you want the employee insurance, choose the option that states “I plan to enroll in coverage”
- Deposit - Declaration
 - **Selecting “NO” will allow enrollment in Direct Deposit as part of the “Manage Payment Elections” task in a later phase where you will enter bank account information.**
 - No, I do not have or will not have instructions with my U.S. bank to immediately wire the full amount of my direct deposit to a financial institution outside the U.S.
 - **Selecting “YES” will not allow enrollment in Direct Deposit**
 - Yes, I have or will have instructions with my U.S. bank to immediately wire the full amount of my direct deposit to a financial institution outside the U.S.

***REFRESH YOUR INBOX AFTER COMPLETING ALL OF GROUP 1 TASKS**

Group 2

- Edit Government ID - Add your Social Security Number
- Complete Federal Withholding Elections

- Complete State and Local Withholding Elections
 - Manage Payment Elections – this will set up your Direct Deposit
 - Change Self-Identification of Disability
 - Change Veteran Status Identification
-

*REFRESH YOUR INBOX

Group 3

- Review Required New Employee Notices
- Edit Passports and Visa (important for those with J1 & F1 Visas)
- Complete W-4 in Glacier and Submit to Payroll (if applicable)

The Glacier Tax Summary Form is a requirement at the time of hire. This should have already been done with your HR Contact. If it has been completed, click SUBMIT. If you're not sure, check with your HR Contact.

*REFRESH YOUR INBOX

Group 4

- Benefit Enrollment (for benefits-eligible employees)

A few things to know about enrolling in insurance:

If you have any Dependents that need insurance coverage, you will **first** add their information under your Dependent section. Then follow the steps to upload documentation for each.

Once dependents have been added, go back to your inbox task to enroll in benefits and add them to your coverages as you enroll.

*If you want to pay the higher cost to have coverage begin before your employer contribution start date, contact the Benefits Office **before** enrolling.