workday.

Onboarding

The Employee Perspective

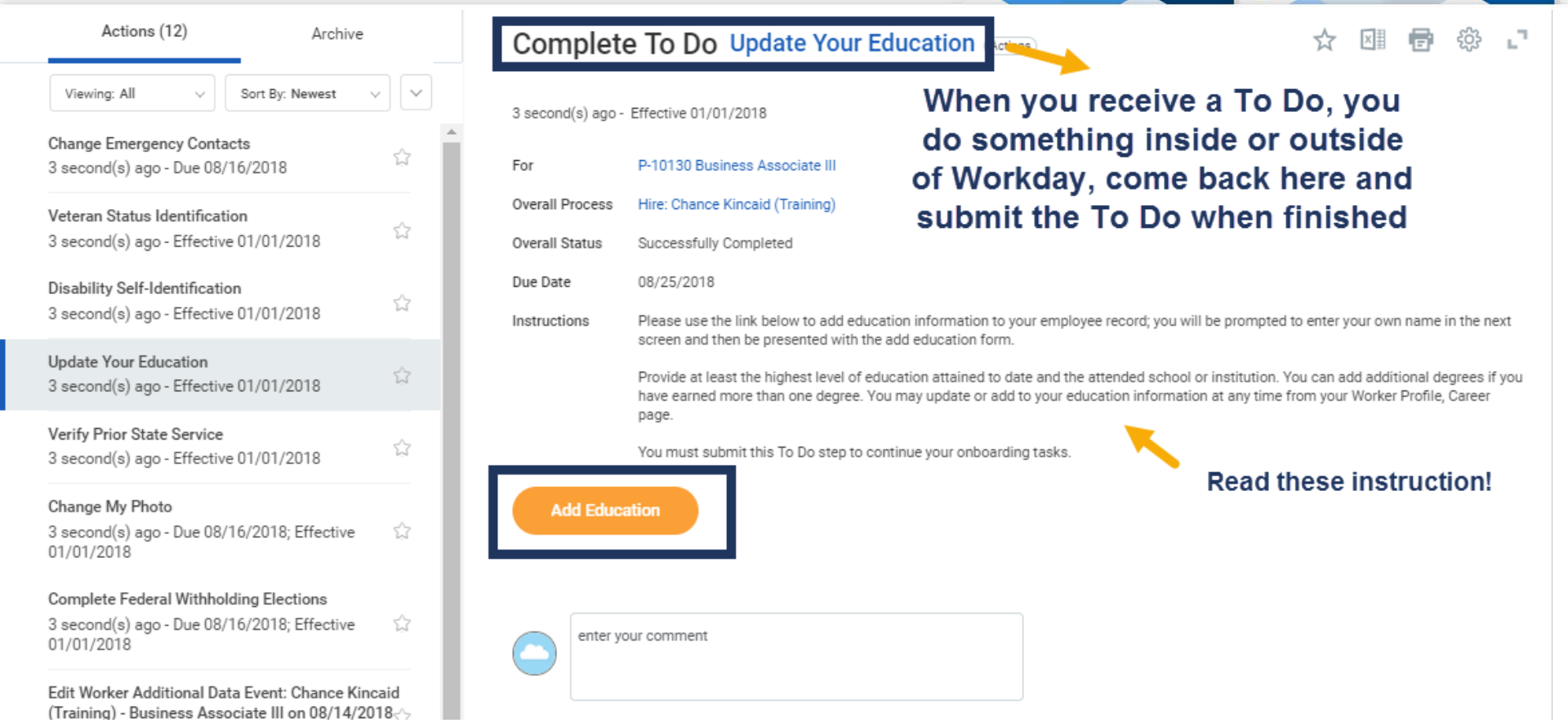
August 27, 2018

Onboarding Overview

- Onboarding is a dynamic process that varies depending on the worker that has been hired. Not everyone sees everything shown here. And not all processes are described in this resource. This is a sample of one experience
- Onboarding triggers once you have been officially hired in Workday
- Not every Employee will experience the exact same tasks in Workday because situations vary. For example, if you are not benefits eligible, benefit tasks will not come to your inbox
- Read carefully. If the inbox item says “To Do”, you need to follow the instructions AND click Submit when finished. Always Submit the To Do after doing what was requested
- Not Submitting items in your inbox for Onboarding in a timely manner can have negative impacts for you down the road
- You can always update your education and photo later. Feel free to submit these items and move on

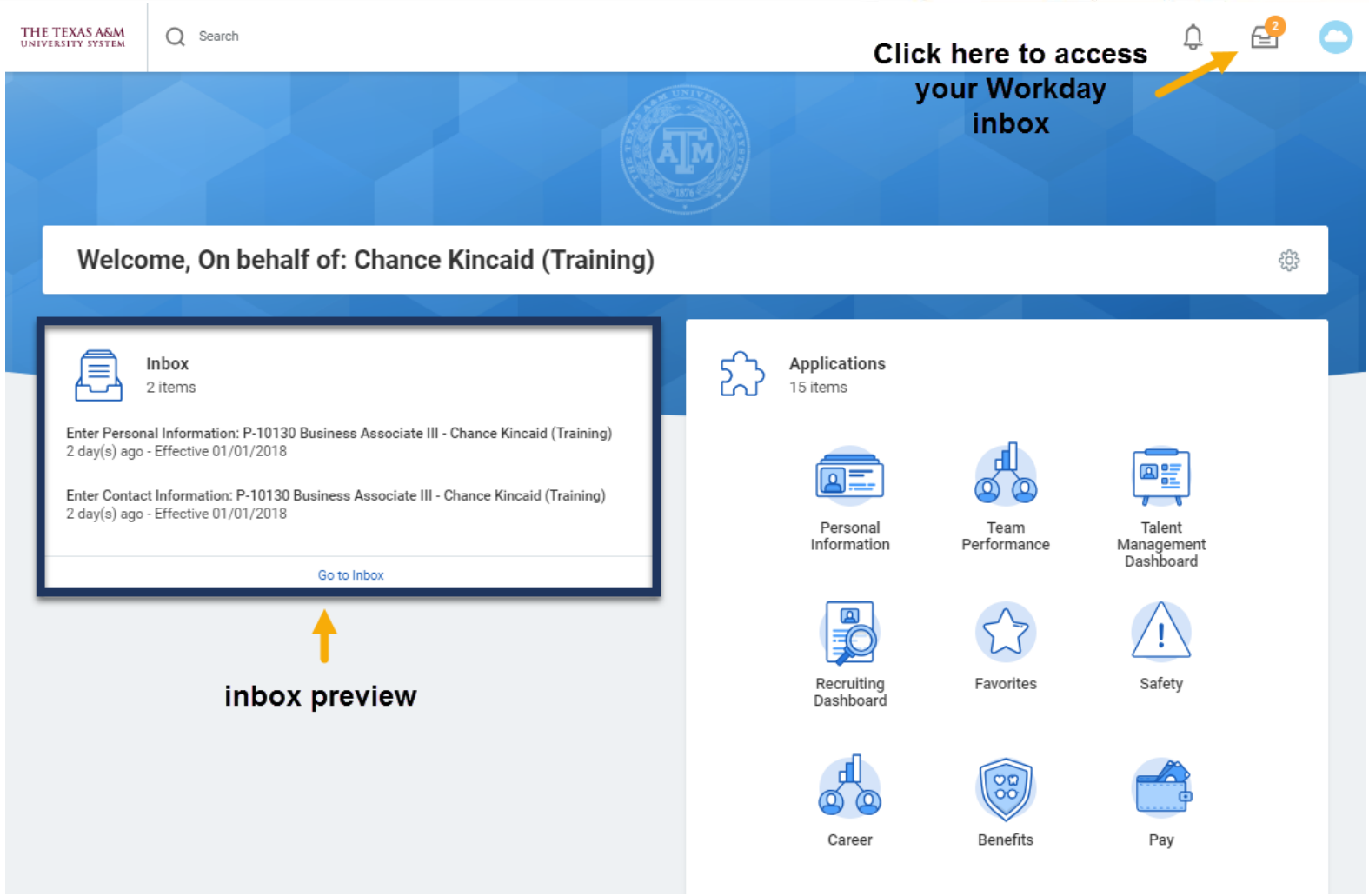
What's a "To Do"?

- A To Do in Workday is a prompt to do something either in Workday or outside of Workday.
- You MUST ***submit*** the To Do to acknowledge that you have completed the instructions provided or the onboarding process will not move forward.This can delay further onboarding activities needed
- Sometimes a To Do has a button that takes you somewhere in Workday to do something. This button has been provided to make it easy for you to get where you need to go
- **IMPORTANT!!** Don't forget to come back to your inbox and click **Submit** on the To Do to move things along for your Onboarding processes

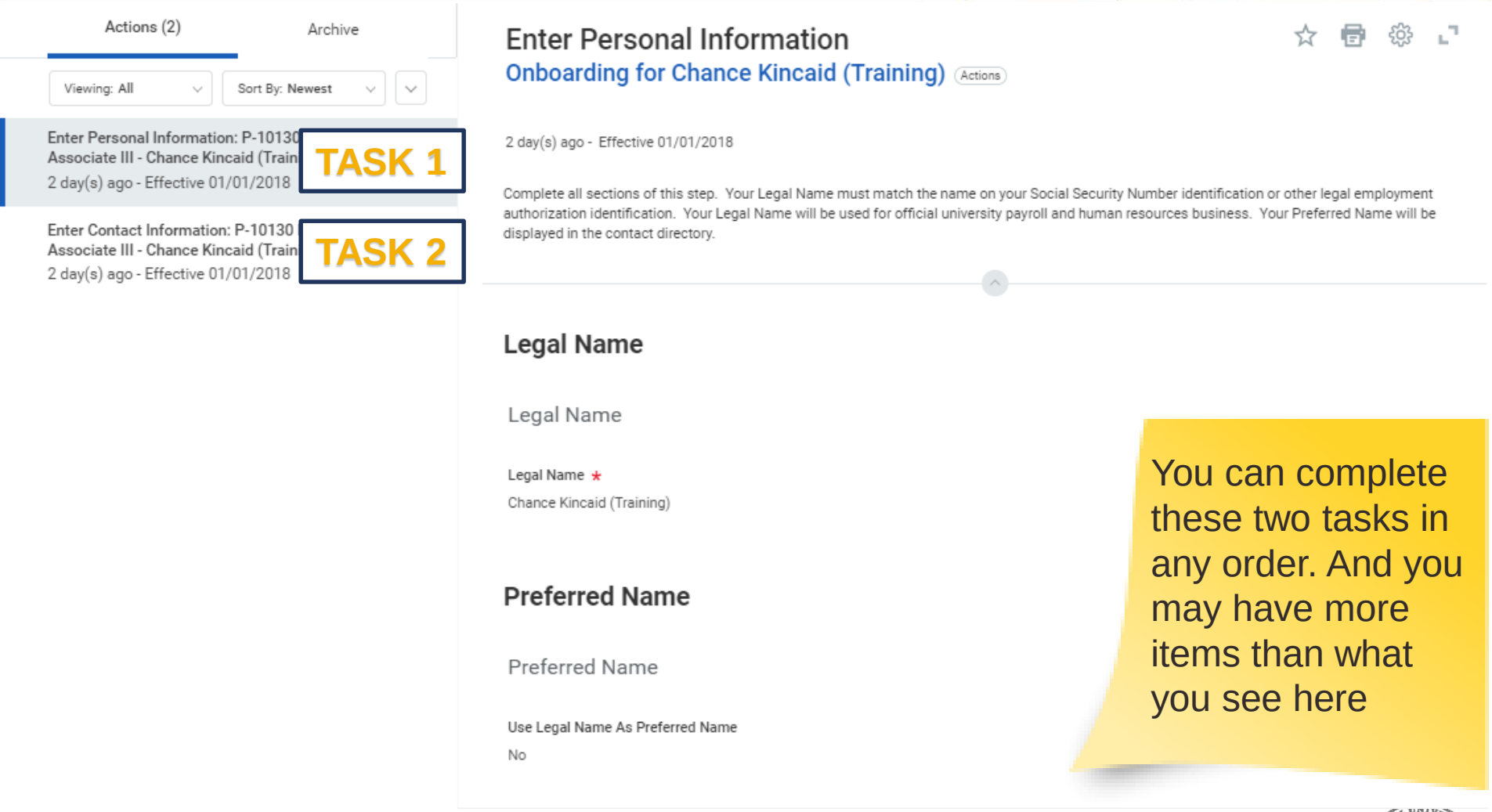

Actions (12)
Archive
Viewing: All
Sort By: Newest
Change Emergency Contacts
3 second(s) ago - Due 08/16/2018
Veteran Status Identification
3 second(s) ago - Effective 01/01/2018
Disability Self-Identification
3 second(s) ago - Effective 01/01/2018
Update Your Education
3 second(s) ago - Effective 01/01/2018
Verify Prior State Service
3 second(s) ago - Effective 01/01/2018
Change My Photo
3 second(s) ago - Due 08/16/2018; Effective 01/01/2018
Complete Federal Withholding Elections
3 second(s) ago - Due 08/16/2018; Effective 01/01/2018
Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018
Complete To Do Update Your Education
3 second(s) ago - Effective 01/01/2018
For P-10130 Business Associate III
Overall Process Hire: Chance Kincaid (Training)
Overall Status Successfully Completed
Due Date 08/25/2018
Instructions Please use the link below to add education information to your employee record; you will be prompted to enter your own name in the next screen and then be presented with the add education form.
Provide at least the highest level of education attained to date and the attended school or institution. You can add additional degrees if you have earned more than one degree. You may update or add to your education information at any time from your Worker Profile, Career page.
You must submit this To Do step to continue your onboarding tasks.
Add Education
enter your comment
When you receive a To Do, you do something inside or outside of Workday, come back here and submit the To Do when finished
Read these instruction!

Stage 1: What's Waiting for you in Workday

You've Got Mail!

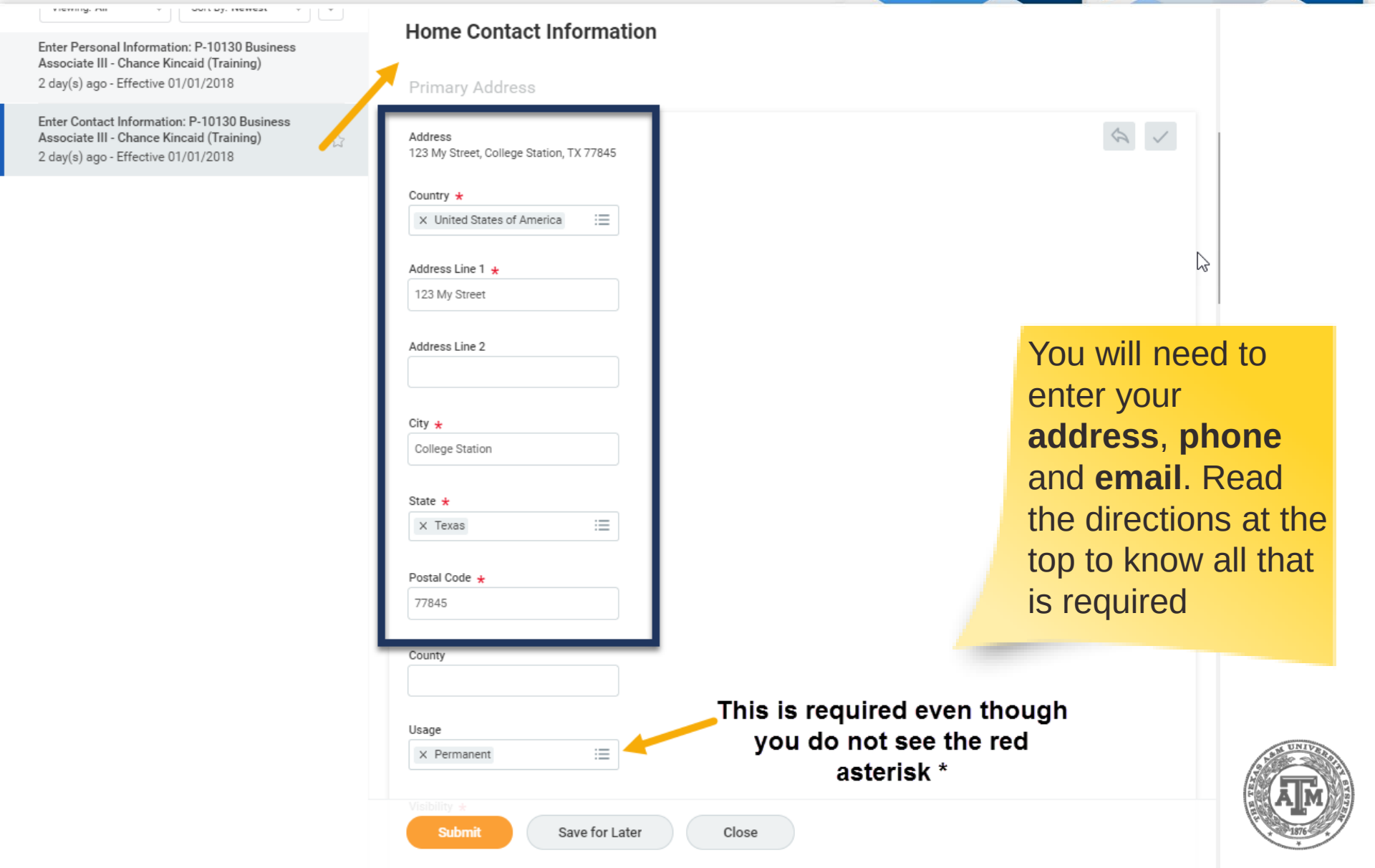


First Two Tasks



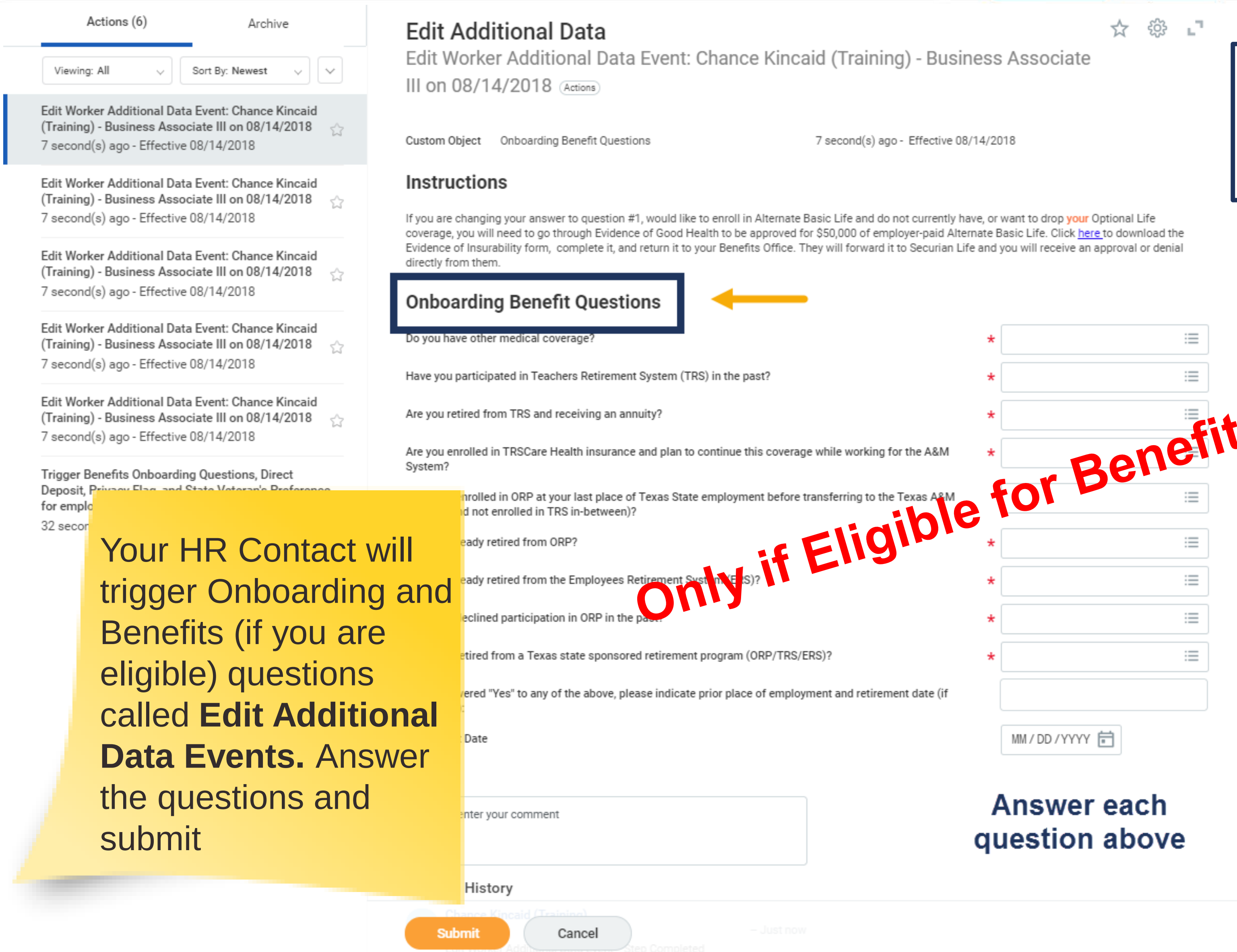
You can complete these two tasks in any order. And you may have more items than what you see here

Enter Contact Information



Stage 2: Your HR Contact Triggers Questions to you in Workday

Onboarding Benefit Questions



Actions (6)   Archive

Viewing: All   Sort By: Newest

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018
7 second(s) ago - Effective 08/14/2018

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018
7 second(s) ago - Effective 08/14/2018

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7 second(s) ago - Effective 08/14/2018

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018
7 second(s) ago - Effective 08/14/2018

Trigger Benefits Onboarding Questions, Direct Deposit, Privacy Flag, and State Veteran's Preference for emplo...
32 secon...

Edit Additional Data

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018 Actions

Custom Object   Onboarding Benefit Questions   7 second(s) ago - Effective 08/14/2018

Instructions

If you are changing your answer to question #1, would like to enroll in Alternate Basic Life and do not currently have, or want to drop your Optional Life coverage, you will need to go through Evidence of Good Health to be approved for $50,000 of employer-paid Alternate Basic Life. Click here to download the Evidence of Insurability form, complete it, and return it to your Benefits Office. They will forward it to Securian Life and you will receive an approval or denial directly from them.

Onboarding Benefit Questions

- Do you have other medical coverage? *
- Have you participated in Teachers Retirement System (TRS) in the past? *
- Are you retired from TRS and receiving an annuity? *
- Are you enrolled in TRSCare Health insurance and plan to continue this coverage while working for the A&M System? *
- ...nrolled in ORP at your last place of Texas State employment before transferring to the Texas A&M ...d not enrolled in TRS in-between)?
- ...eady retired from ORP? *
- ...eady retired from the Employees Retirement System (ERS)? *
- ...eclined participation in ORP in the past? *
- ...etired from a Texas state sponsored retirement program (ORP/TRS/ERS)? *
- ...ered "Yes" to any of the above, please indicate prior place of employment and retirement date (if ...
- ...Date   MM / DD / YYYY

...nter your comment

History

Submit   Cancel

Edit Additional Data Event 1

Only if Eligible for Benefits!!!

Answer each question above

Your HR Contact will trigger Onboarding and Benefits (if you are eligible) questions called **Edit Additional Data Events.** Answer the questions and submit

TRS Onboarding Question

Edit Additional Data

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018 Actions

Edit Additional Data Event 2

Custom Object TRS ISD Onboarding Question 1 minute(s) ago - Effective 08/14/2018

TRS ISD Onboarding Question

Are you currently being deducted for Teacher Retirement System from another Texas State institution or school district? *

enter your comment

Teacher Retirement System (TRS) onboarding question. Select **Yes** or **No**

Only if Eligible for Benefits!!!

search

- Yes and I will continue to be deducted
- Yes, deductions will stop now that I am working at the A&M System
- No, I am not being deducted for TRS

Process History

Chance Kincaid (Tr ago

Edit Worker Additio

Edit Additional Data: TRS ISD Onboarding Question

Edit Additional Data: Onboarding Benefit Questions– Not Required

Edit Additional Data: TRS ISD Onboarding Question– Not Required

Privacy Flag

Edit Additional Data

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018 Actions

Edit Additional Data Event 3

Custom Object Privacy Flag 1 minute(s) ago - Effective 08/14/2018

Instructions

State law gives you the right to choose whether The Texas A&M University System should allow public access to your home address, home telephone number, emergency contact information, Social Security number, and whether you have family members. **If you do not declare this personal information as confidential, it will be open to the public.** If you are a "peace officer," your home address and telephone number are automatically confidential. **Respond to both questions below:**

Privacy Flag

I am a certified peace officer ☐

I want my personal information to be confidential ☑

enter your comment

Designate whether you are a certified peace officer. Would you like your personal information to be confidential? Mark the boxes as needed

Direct Deposit Declaration

Edit Additional Data

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018 Actions

Edit Additional Data Event 4

Custom Object Direct Deposit Declaration) ago - Effective 08/14/2018

Instructions

IMPORTANT: PLEASE READ CAREFULLY!

Select the response below to declare if you *WILL* FULL AMOUNT OF YOUR FUNDS OUTSIDE THE UNITED STATES.

If you select "Yes, I have or will have", you will not aycheck at this time.

As a U.S. entity, all members of The Texas A&M U ith the requirements
Office of Foreign Assets Control (OFAC), which ov l jurisdiction of the U
clearing house (ACH) payments, such as electron oll payments or oth
employer must be informed if you will immediate sit to a foreign ban
be able to sign up for direct deposit until you prov ffice.

Direct Deposit Declaration

Are You Transferring Funds Outside the U.S.? *

- 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.
- 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.

search

enter your comment

Are you going to be wiring your paycheck to a financial institution outside of the U.S.? Select **Yes** or **No**

State Veteran's Preference

Edit Additional Data

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018 Actions

Custom Object State Veteran's Preference 1 minute(s) ago - Effective 08/14/2018

Instructions

Texas Government Code, Section 657, as amended, requires that a state agency or institution of higher education must provide employment preference to individuals who qualify for a veteran's employment preference. An individual who qualifies for a veteran's employment preference is entitled to a preference in employment with or appointment to a state agency or institution of higher education over other applicants for the same position who do not have a greater qualification.

Do you qualify for State of Te… …n the four definitions below?

Veteran. The individual is defi… …has been honorably discharged from) the following branches of service: T… Army, Navy, Air Force, Marine … …lth; Service under Title 42, United States Code, Section 201; The Texas Mi… as defined by Texas Governm… …rvice of one of the branches of the U.S. Armed Forces.

Disabled Veteran. The individ… …ed as disabled by the U.S. Department of Veterans Affairs or the branch … in which the veteran served a…

Surviving Spouse of a Vetera… …eteran who has not remarried.

Orphan of a Veteran. The indi… …was killed on active duty.

You are not obligated to resp… …hics; however, your response is important to meet federal and state rep… requirements. Information yo… …nce with applicable federal and state regulations. Your employment wi… adversely affected by informa…

- Veteran
- Disabled Veteran
- Surviving Spouse of a Veteran
- Orphan of a Veteran
- Decline to respond
- None of the above

State Veteran's Pr…

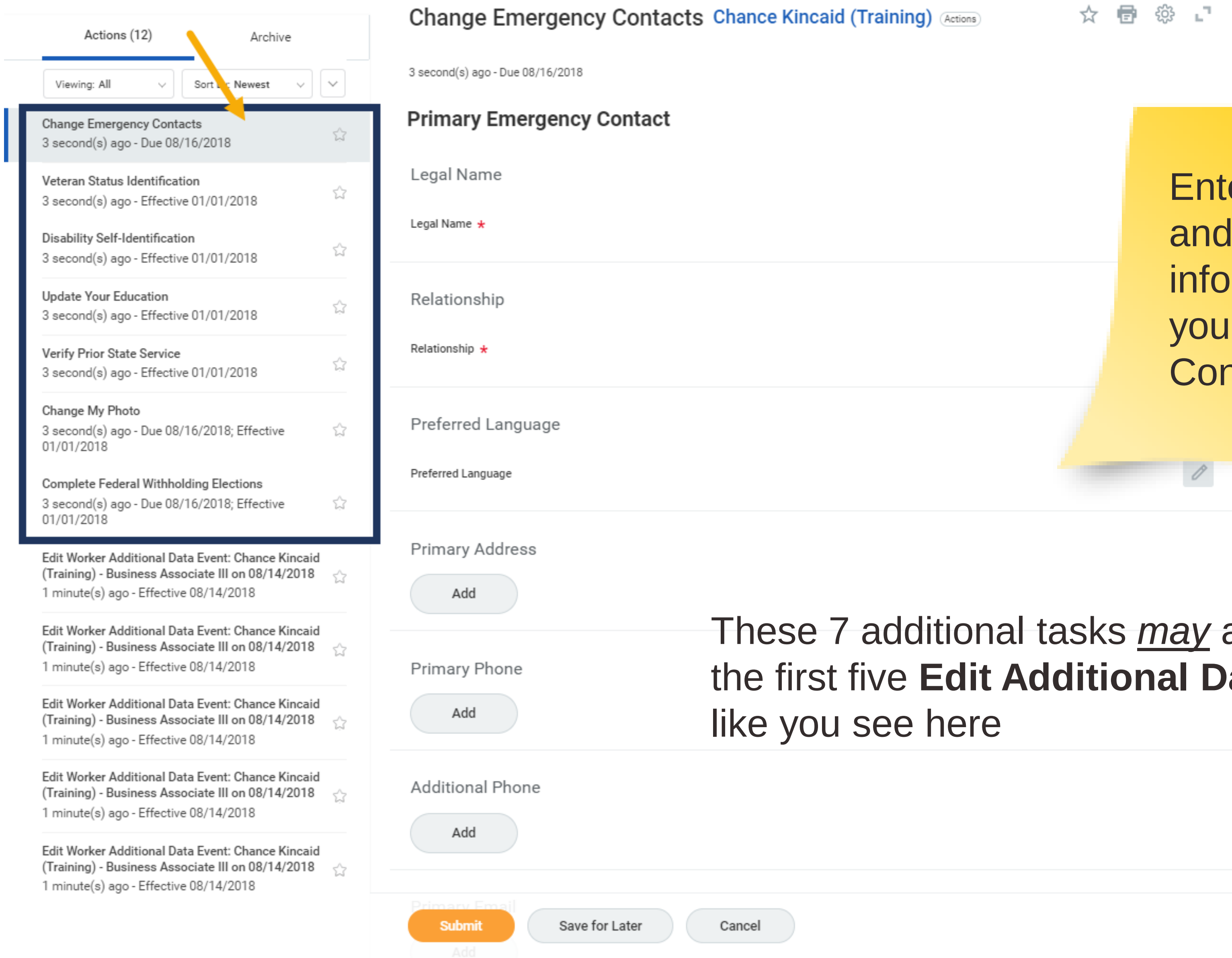
State Veteran's Preference search

enter your comment

Edit Additional Data Event 5

Identify your State Veteran's Status by selecting the appropriate option

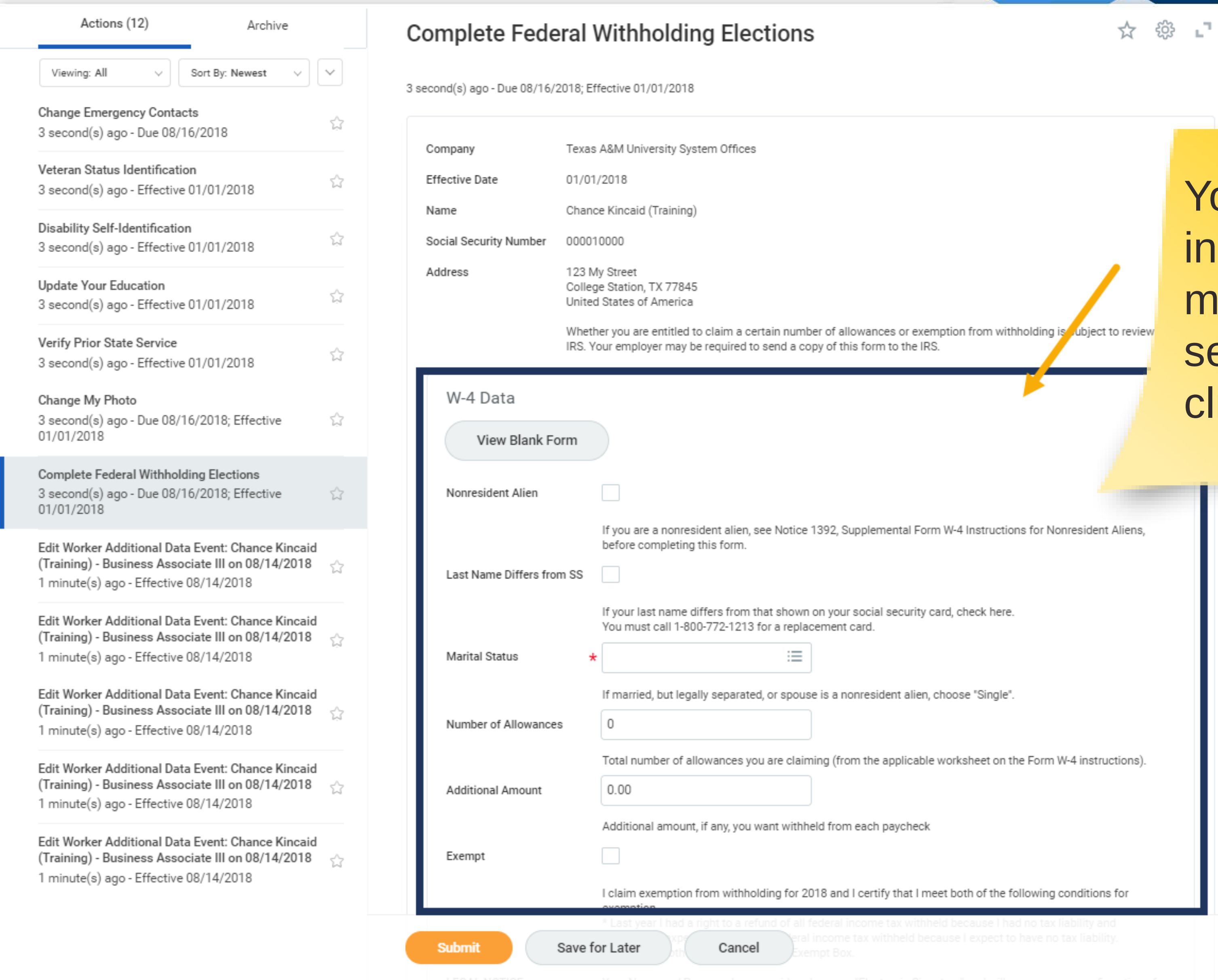
Change Emergency Contacts



Enter the name and relevant information for your Emergency Contact

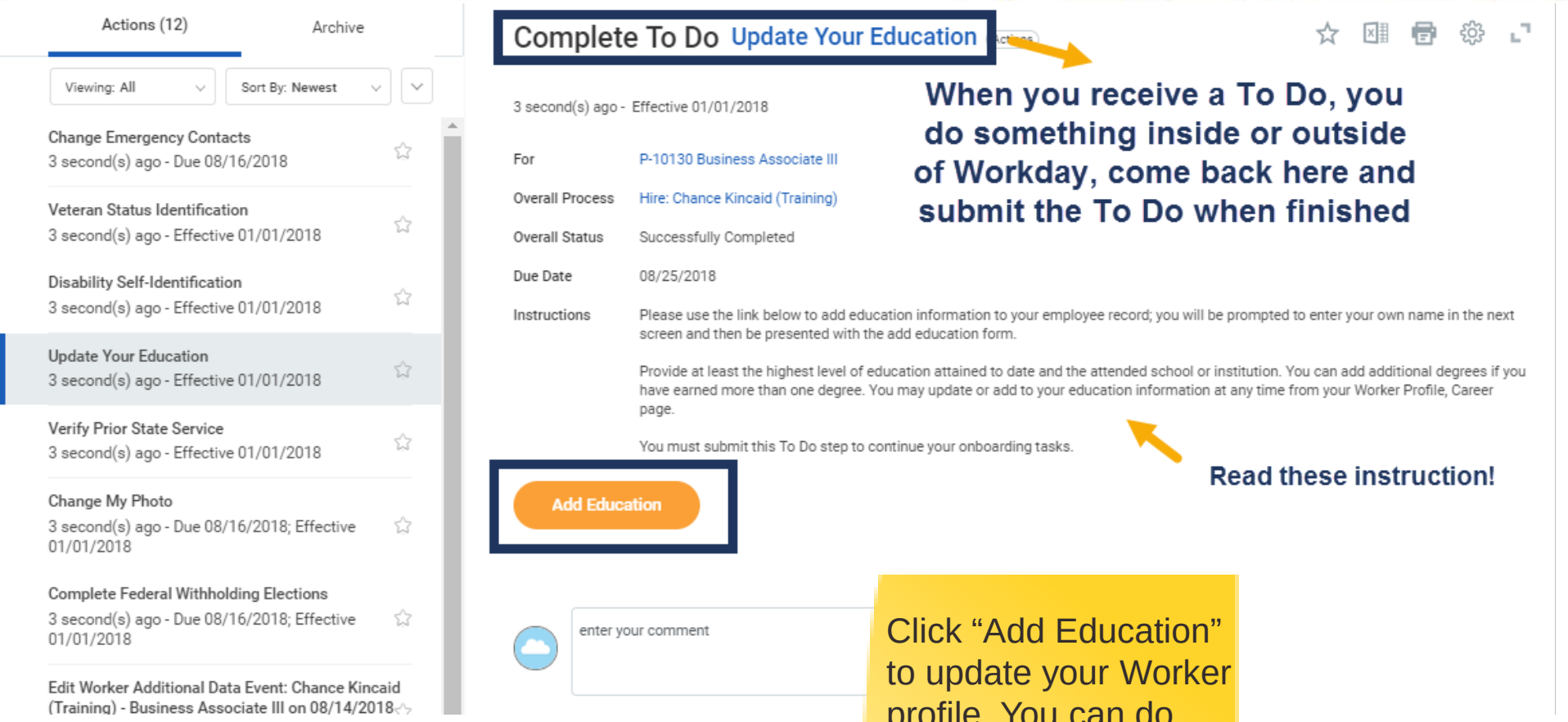
These 7 additional tasks *may* arrive with the first five **Edit Additional Data Events** like you see here

Federal Withholding



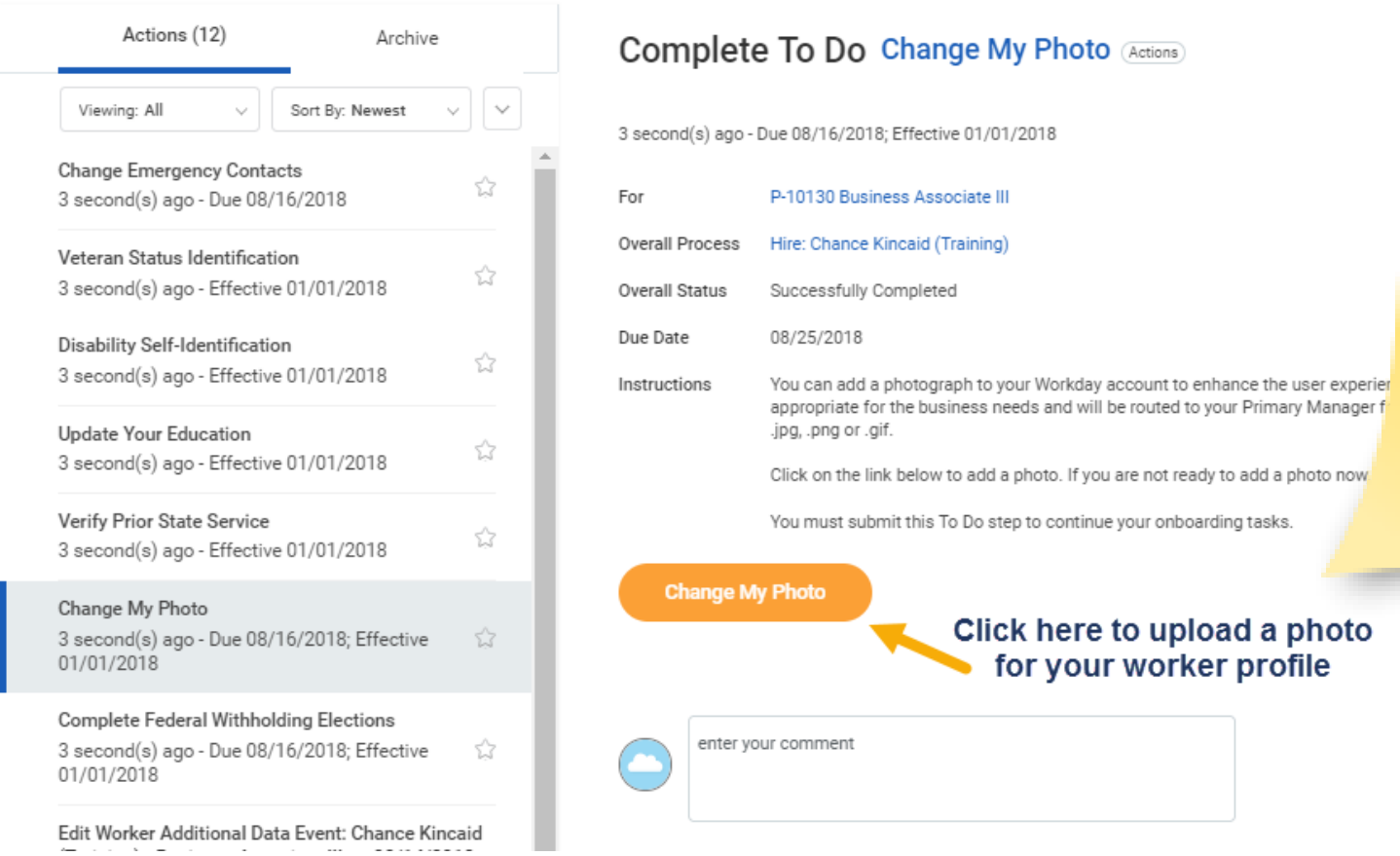
You must enter information and mark appropriate selections. Then click **Submit**

Your Education



Click “Add Education” to update your Worker profile. You can do this now or wait. <u>You need to submit the To Do to continue the business process</u>

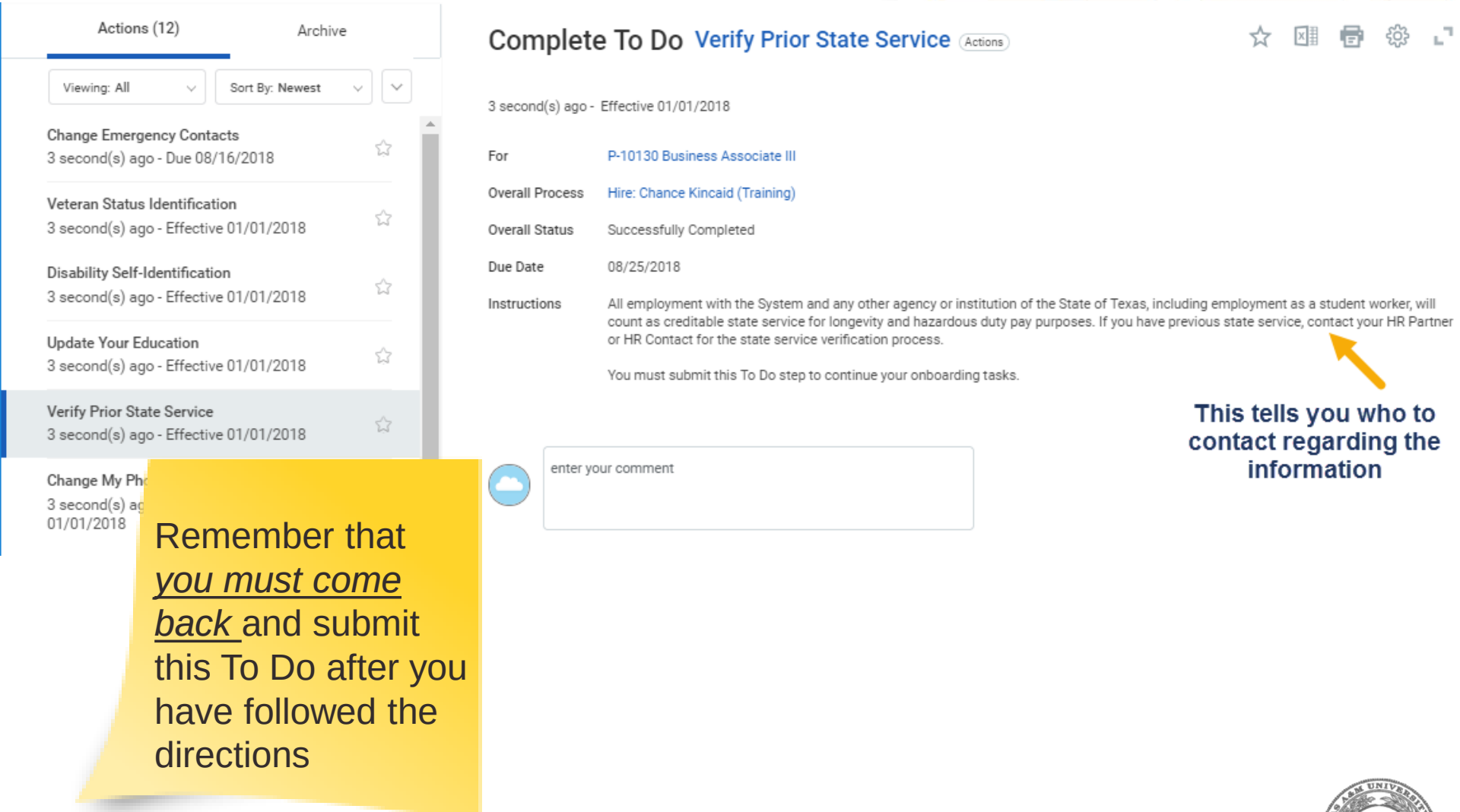
Upload a Photo



Upload your photo now or later. **Submit** this To Do so as not to hold up the onboarding business process

Your manager must approve the photo in Workday ***before*** it will display

Verify Prior State Service



This tells you who to contact regarding the information

Remember that *you must come back* and submit this To Do after you have followed the directions

Disability Self-Identification

Actions (12) | Archive

Viewing: All | Sort By: Newest

Change Emergency Contacts
3 second(s) ago - Due 08/16/2018

Veteran Status Identification
3 second(s) ago - Effective 01/01/2018

Disability Self-Identification
3 second(s) ago - Effective 01/01/2018

Update Your Education
3 second(s) ago - Effective 01/01/2018

Verify Prior State Service
3 second(s) ago - Effective 01/01/2018

Change My Photo
3 second(s) ago - Due 08/16/2018; Effective 01/01/2018

Complete Federal Withholding Elections
3 second(s) ago - Due 08/16/2018; Effective 01/01/2018

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018
1 minute(s) ago - Effective 08/14/2018

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018
1 minute(s) ago - Effective 08/14/2018

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018
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1 minute(s) ago - Effective 08/14/2018

Edit Worker Additional Data Event: Chance Kincaid (Training) - Business Associate III on 08/14/2018
1 minute(s) ago - Effective 08/14/2018

Change Self-Identification of Disability

3 second(s) ago - Effective 01/01/2018

Voluntary Self-Identification of Disability

Form	CC-305
OMB Control Number	1250-0005
Expires	01/31/2020

Why are you being asked to complete this form?

Because we do business with the government, we must reach out to, hire, and provide equal opportunity to qualified people with disabilities. us measure how well we are doing, we are asking you to tell us if you have a disability or if you ever had a disability. Completing this form is but we hope that you will choose to fill it out. If you are applying for a job, any answer you give will be kept private and will not be used agai any way.

If you already work for us, your answer will not be used against you in any way. Because a person may become disabled at any time, we a ask all of our employees to update their information every five years. You may voluntarily self-identify as having a disability on this form w any punishment because you did not identify as having a disability earlier.

How do I know if I have a disability?

You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a majo if you have a history or record of such an impairment or medical condition.

Disabilities include, but are not limited to:

- Blindness
- Deafness
- Cancer
- Diabetes
- Epilepsy
- Autism
- Cerebral palsy
- HIV/AIDS
- Schizophrenia
- Muscular dystrophy
- Bipolar disorder
- Major depression
- Multiple sclerosis (MS)
- Missing limbs or partially missing limbs
- Post-traumatic stress disorder (PTSD)
- Obsessive compulsive disorder
- Impairments requiring the use of a wheelchair
- Intellectual disability (previously called mental retardation)

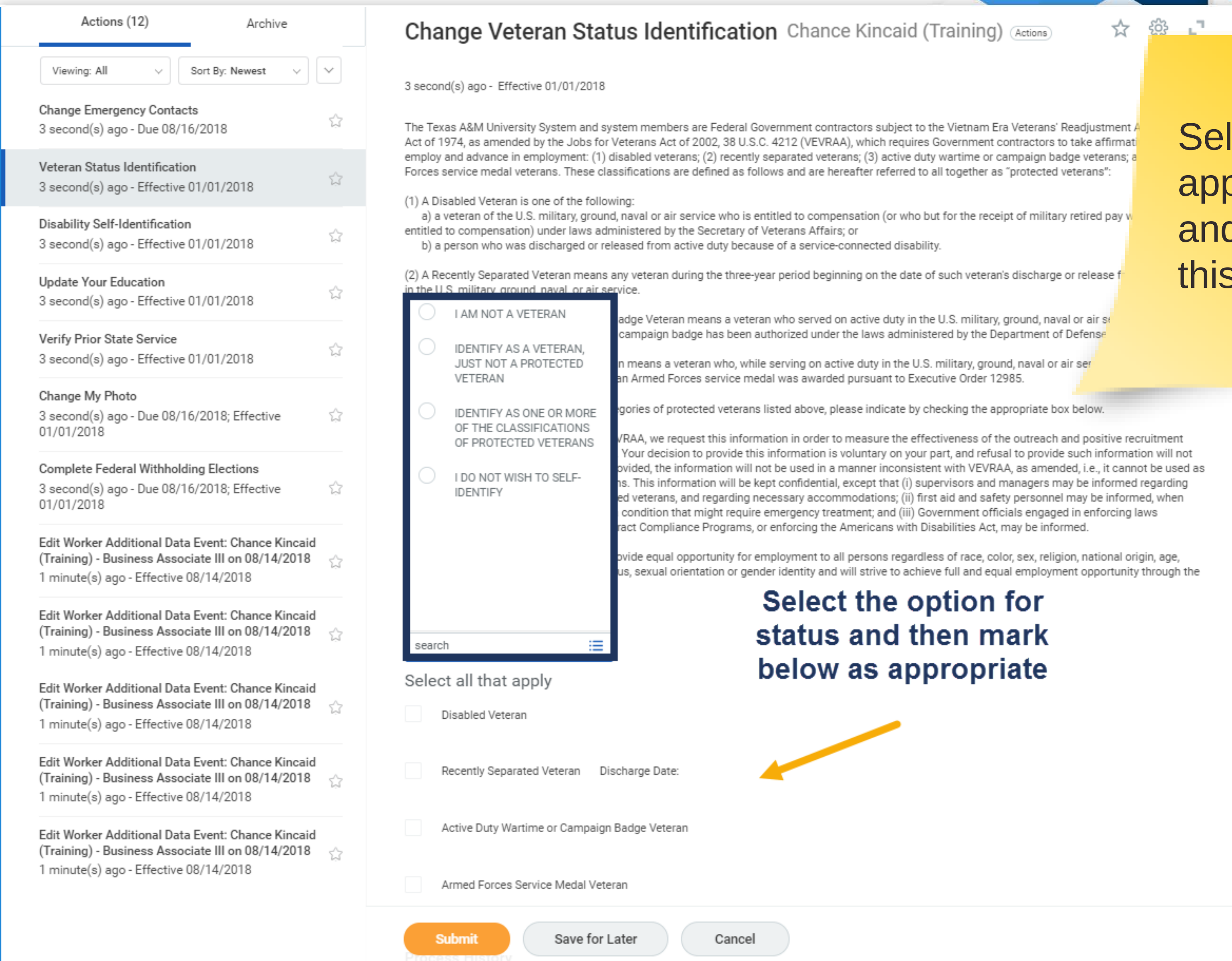
Please select one of the below:

- YES, I HAVE A DISABILITY (or previously had a disability)
- NO, I DON'T HAVE A DISABILITY

Submit | Save for Later | Cancel

Select the appropriate option and then **Submit** this task

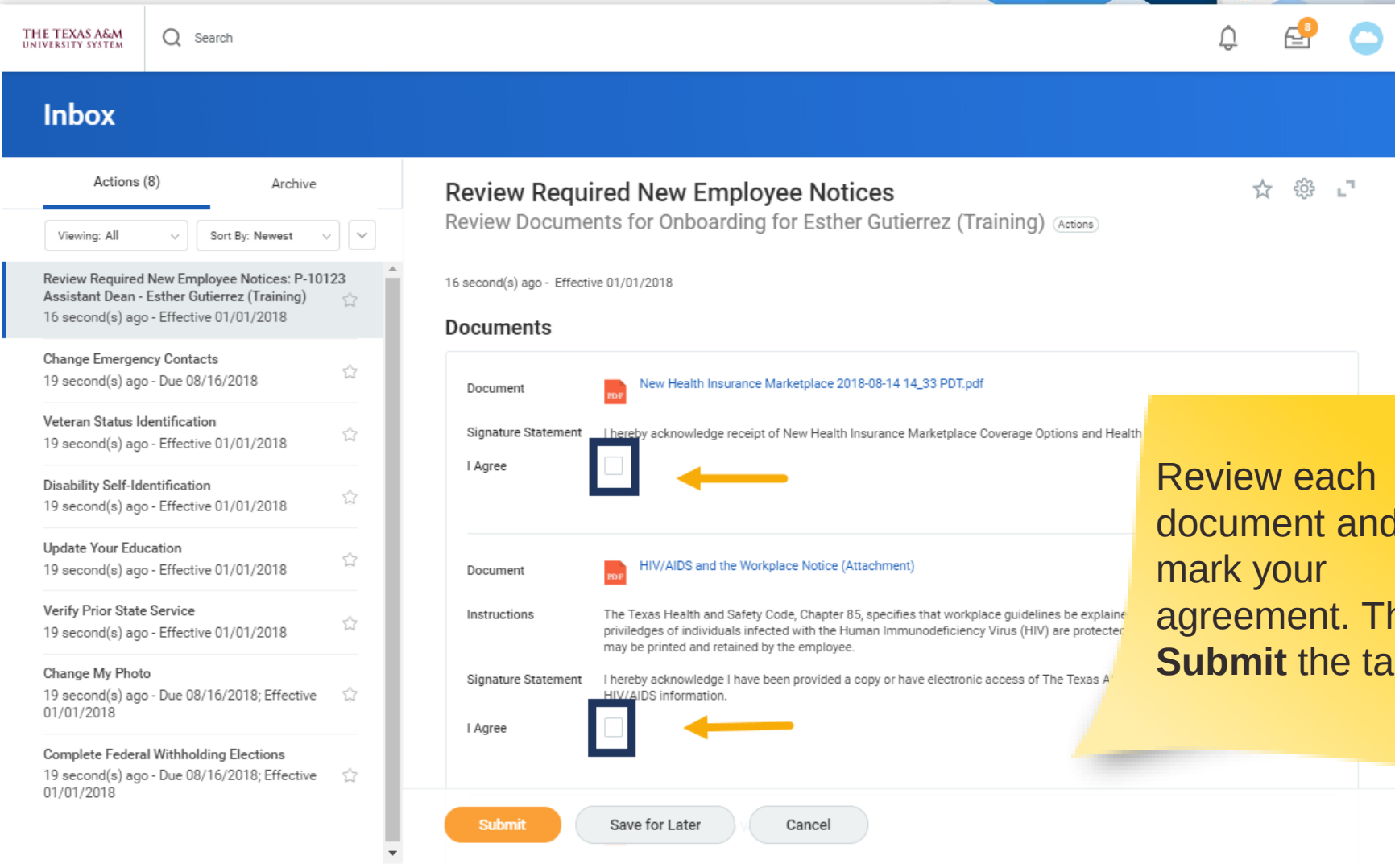
Veteran Status - Federal



Select the appropriate option and then **Submit** this task

Select the option for status and then mark below as appropriate

Review Notices



Review each document and then mark your agreement. Then **Submit** the task

Stage 3: Your Support Personnel will Complete Tasks

Stage 4: Final Group of Tasks Arrive in Your inbox

Payment Election

Actions (4) | Archive

Viewing: All | Sort By: Newest

- Payment Election Enrollment Event
  4 hour(s) ago
- Enroll in Electronic W-2
  4 hour(s) ago - Effective 01/01/2018
- Change 1095-C Printing Election
  4 hour(s) ago - Effective 01/01/2018
- Change Benefits for Life Event
  4 hour(s) ago - Effective 01/01/2018

Manage Payment Elections

4 hour(s) ago

Worker: Chance Kincaid (Training)

Default Country: United States of America

Default Currency: USD

Preferred Payment Method

Payroll * Direct Deposit

Expense * Direct Deposit

These default to direct deposit

Edit if you would like a physical pay check. Otherwise continue down the page and complete the banking information

Account Setup

Worker: Chance Kincaid (Training)

Sample Check

Account Information

Account Nickname (optional)

Account Type * Checking / Savings

Bank Name *

Routing Transit Number *

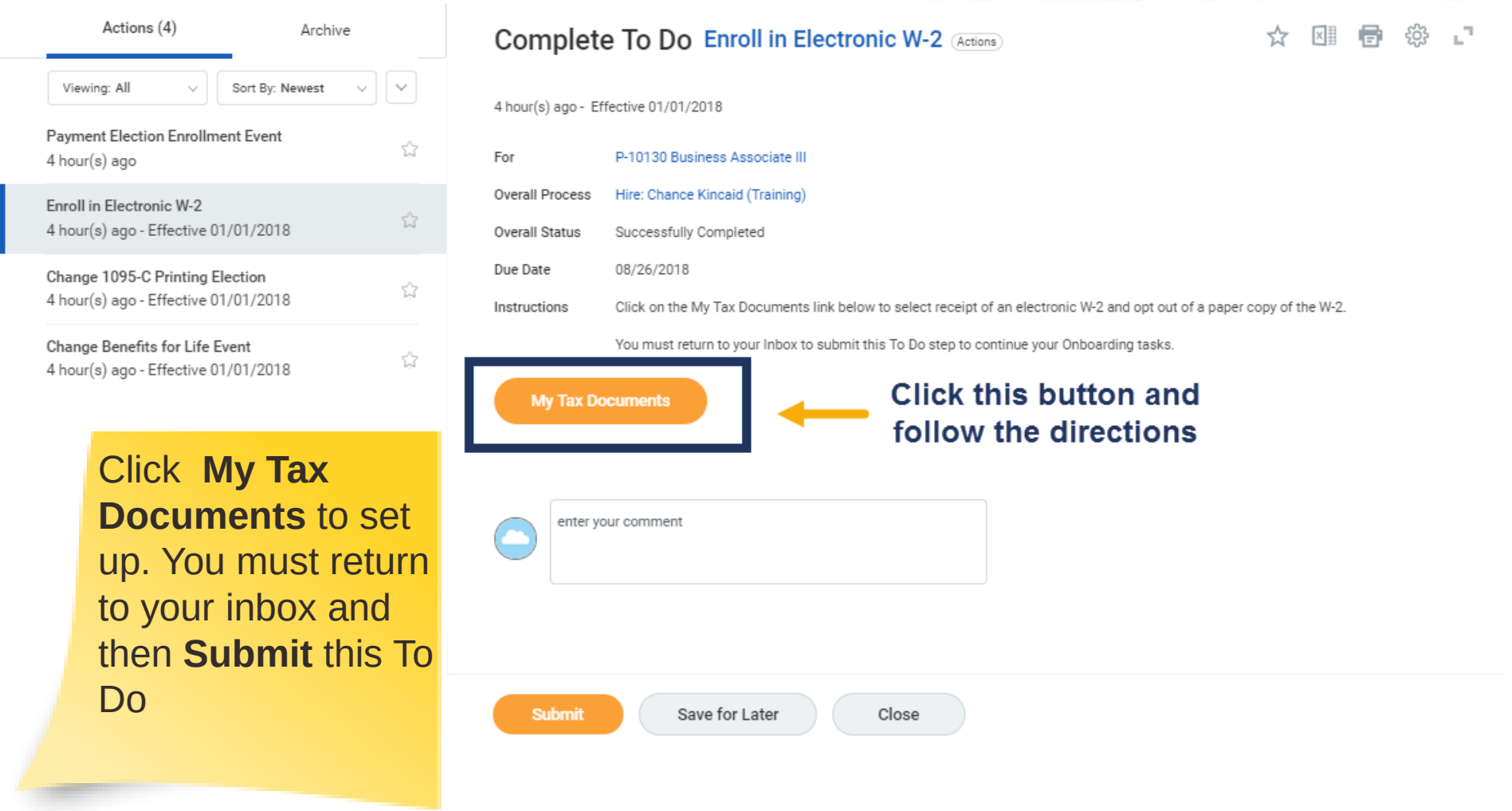
Account Number *

Additional Information

Bank Identification Code

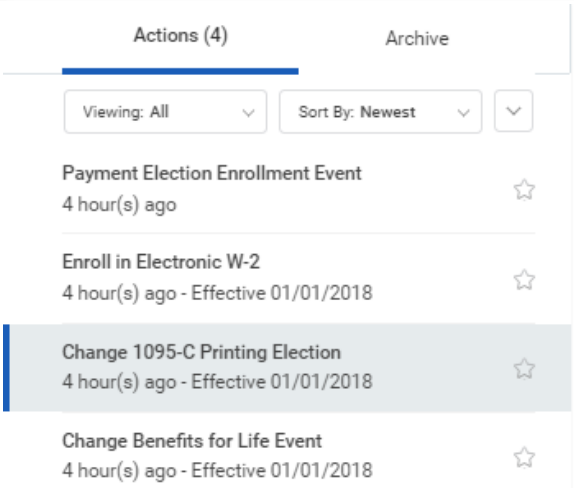
OK | Cancel

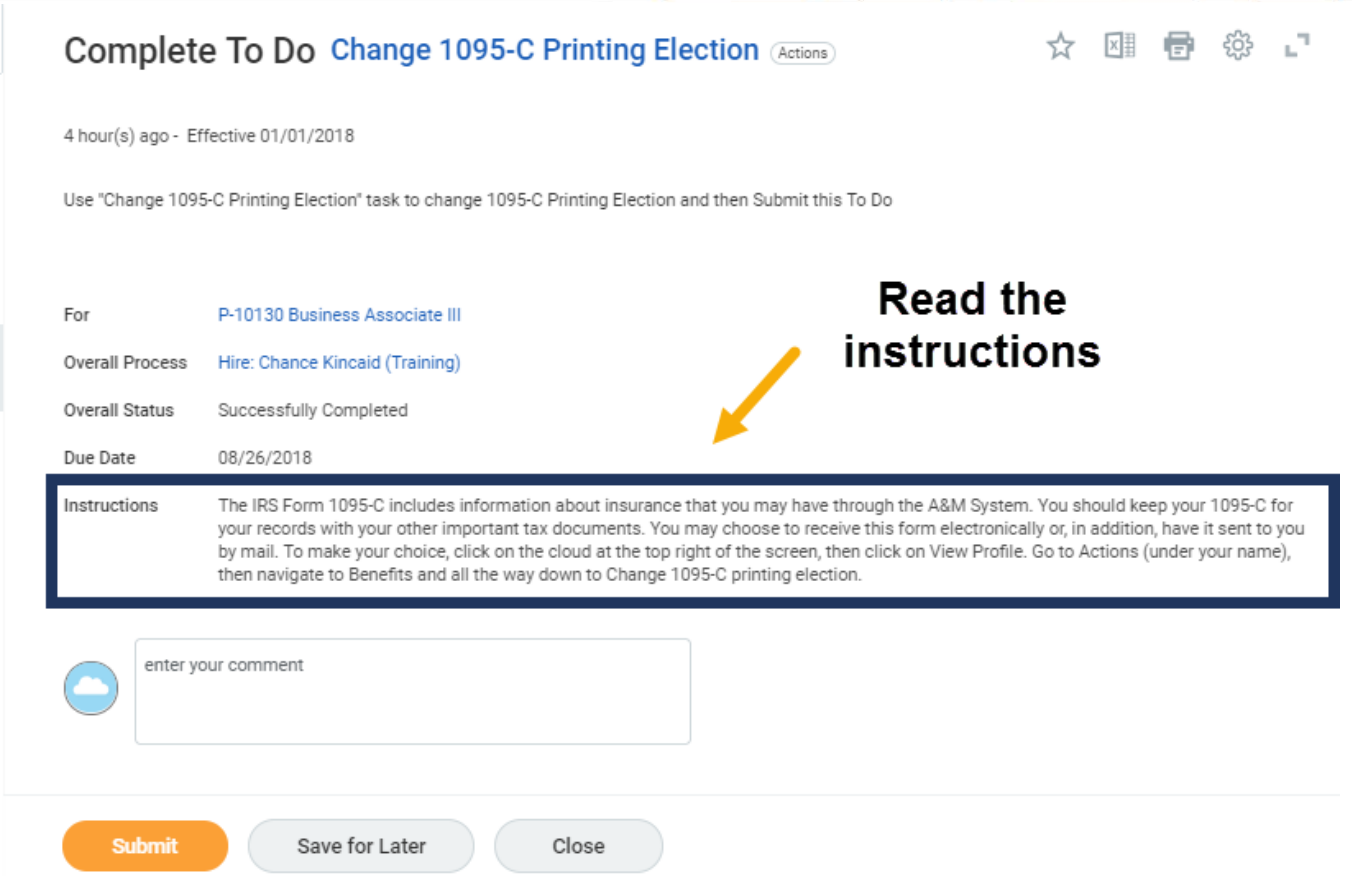
Enroll in Electronic W-2



Click **My Tax Documents** to set up. You must return to your inbox and then **Submit** this To Do

Change 1095-C Printing





You will go to your Worker profile and follow these directions. Then return here and **Submit** the To Do

Change Benefits for Life

Actions (4) | Archive

Viewing: All | Sort By: Newest

Payment Election Enrollment Event
4 hour(s) ago

Enroll in Electronic W-2
4 hour(s) ago - Effective 01/01/2018

Change 1095-C Printing Election
4 hour(s) ago - Effective 01/01/2018

Change Benefits for Life Event
4 hour(s) ago - Effective 01/01/2018

Change Benefit Elections

Hire - benefits effective first of month following 60 days for Chance Kincaid (Training) - Step 1 of 6 Actions

Total Cost	Total Credits	Total Employee Net Cost/Credit
$30.00 TAMUS Bi-weekly Cost	$0.00 TAMUS Bi-weekly Credit	$30.00 TAMUS Bi-weekly Cost

Event Date 01/01/2018

Initiated On 08/14/2018

Submit Elections By 09/27/2018

4 hour(s) ago - Effective 01/01/2018

Always read the information provided

Please select your medical, dental and vision elections below. If you indicated that you already have medical coverage elsewhere, you will see that the employer contribution will cover the cost of some of your coverages.

If you want to add dependents (who are not yet in Workday) to any of your coverages, please return to the benefits worklet and edit your Dependents before proceeding.

Your medical coverage, along with any of the optional coverages you choose, will begin on the first of the month following 60 days after your hire date. If you want to start your medical coverage immediately, please contact your HR Office.

Your employer contribution will not be shown below, because it does not start until first of the month following 60 days after you're hired or become newly eligible. To see the correct premiums, including the employer contribution, click here.

Your elections will be in effect until the next plan year, unless you have a qualifying life event and change your elections at that time.

Note:

- Bi-weekly paid employees, the amounts you see are per paycheck, not per month (maximum two per month).
- If you or your spouse use tobacco products, the health plan rates include an additional $30 per month.

Only if Eligible for Benefits!!!

Health Information

1 item

Have you used tobacco products in the last three months?

Yes

No

Continue | Save for Later | Cancel

You will now make your elections for medical, dental and life insurance along with other benefit elections. You will electronically sign