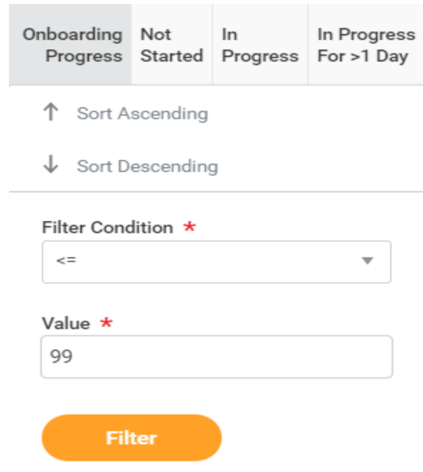
ONBOARDING

******MONITOR ONBOARDING TASKS TO ENSURE COMPLETION******



- **Monitor the Onboarding Status Summary report** (only 90 days of history)
    - Enter “Onboarding Status Summary” in search bar
    - Select the top Supervisory Org that you support and select “Include Subordinate Organizations”
    - To see only those employees who have <u>not</u> completed onboarding, filter the “Onboarding Progress” column to view those at 99% completion or less
    - Look at the “In Progress” column to determine which step or steps are currently in someone’s inbox to be completed.
    - Refer to the columns Not Started, In Progress and Completed to know which steps or tasks remain. The percentage takes into account steps that may ultimately not be required and steps that were skipped. The report is a Workday-delivered report that cannot be modified.
- **New Employees – Wait for Inbox Tasks**
    - Ensure new employees wait on the inbox items before completing their onboarding tasks. some “overachievers” have initiated standalone events in Workday prior to receiving the inbox items, which has created problems. When the UIN is assigned an email is sent to the new employee letting them know they have access to Workday even though Onboarding has not yet kicked off. It is important the new employee understands the need to wait on the inbox tasks to trigger to them as part of the Onboarding process.
- **Complete To Do-Update Time Off Service Date Actions** –
    - ADD 6 months to hire date and enter that date as the “Time Off Service Date”
    - If employee has prior state service, ensure they complete the AG-419 (https://agrilifeas.tamu.edu/documents/ag-419.pdf) and submit to each previous state employer.
- When HR Contact receives the **“To Do” step to “Edit effective-dated custom object”** use the current date if the hire date is in the future or a prior date if the date of hire has past. Do not use a future date.
- Ensure employees enter their Social Security Number when prompted to “**Edit Government ID**.” Failure to do so results in a delay in getting the employee on payroll and many other downstream impacts.

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- **Benefit-Eligible Positions** -- All onboarding tasks must be completed in order for the employee to elect benefits and have proper retirement deductions. Ensure benefits-eligible employees promptly answer Benefits Onboarding Questions. An employee will not be given the task to enroll in Benefits until the Benefits Onboarding questions *are answered & submitted* by the employee and reviewed by Benefits Partner. This step also will ensure the employee is enrolled in TRS, if applicable. In the old world, unit contacts only had to set the new employee up in iBenefits. Then, if the employee did not enroll or waive coverage, the default coverage was applied (employee only health/basic life @ tobacco user rates). Workday will also enroll employees in default coverage, but ONLY IF THE EMPLOYEE ANSWERS AND SUBMITS THE BENEFITS ONBOARDING QUESTIONS. PLEASE stress the importance to your employees of completing ALL of the onboarding tasks IN A TIMELY MANNER. If the Benefits Onboarding questions are not answered within 60 days of employment, the employee likely will not be able to enroll in Benefits until Open Enrollment. If TRS deductions are not taken when the employee is eligible, this will hinder the Payroll reporting and will have repercussions "downstream."
- **Provide to employees**: Onboarding Steps for New Employees https://agrilifeas.tamu.edu/documents/onboarding-steps.pdf/
- **Send Benefit email to new employees**