Onboarding Steps for New Employees

(revised 11/29/18)

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.

Group 1

- Enter Contact Information
- Enter Personal Information
- Change Emergency Contacts
- Set Privacy Flag
- State Veteran's preference
- TRS Question
- Benefits/ Insurance Questions
  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

  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.

  The cost that you see on the screen is the cost BEFORE the employer contribution is applied. The employer contribution is not posted to your benefits page until the start date. You can go back in on that date and view the lower cost.

  *If you want to pay the higher cost to have coverage start earlier, contact the Benefits Office **before** enrolling.