Onboarding Employee

Engineering Human Resource Contact Information
- Engineering Workday Help Email: eworkday-help@tamu.edu
- Engineering Phone: 979.458.7699

What Is Workday?
Workday is a cloud-based system that The Texas A&M University System uses to manage the Human Resources, Benefits and Payroll functions for all employees.
Workday is built on three basic fundamentals:

- **Organizations**: Organizations are used to group people, resources, workers and their institution or agency. They provide management, visibility and reporting structures for resource allocation
- **Business Process**: A business process is a set of tasks used to accomplish a specific goal such as posting a position. Workday will automatically route specific steps in a workflow to those responsible for them. Certain processes may require multiple approvals within Workday and may also have additional approvals outside of Workday
- **Security Roles**: Security roles determine what you can see and do. Initiation of a business process is determined by the employee’s security role in the Workday system. The same business process may be initiated by multiple security roles
  - Security roles are not job titles. The roles provide Workday users access to appropriate data within the assigned organization structure. The roles also determine functional responsibilities, routing of actions in a business process and access to reports
  - Workday users will be assigned a security role based on the access they will need in the system. Some users may be assigned to multiple security roles depending on their duties and responsibilities

Navigating Workday

Accessing Workday
All A&M System employees will access Workday through Single Sign On (SSO).

Workday Home Page
The Workday Home page provides an icon-rich user experience much like what exists on your smart phone or tablet. These icons, called worklets, enable you to quickly access tasks that you will perform on a daily basis as well as the links to pages that will provide additional resources for you.

Worklets
A **worklet** is an icon found on the Home page that makes it easier to access information needed on a routine basis. Some examples of tasks that you can access through worklets include:

- View paystubs or benefits elections
- View reports
- Enter time or request time off
- Access your Inbox
- Use the Gear Icon to add/delete the worklets on your home page.

**Workday Inbox**

- All approvals, reviews, to-dos and other action items are accessed through your Workday Inbox
- Action items remain in your Inbox until you (or someone with the same security role) takes the action
- Access your Inbox by clicking the **Inbox worklet** on your Home page

**Overview**

- This job aid outlines the various tasks and related roles in the onboarding process

**Prerequisite:**

- All steps in the Hire process for an employee must be completed. Payroll Partner assigns pay group.

**Important Information:**

- An email containing login credentials to SSO will be sent to the Employee after the Hire process completes and a successful record is received by SSO from Workday
- Most of the tasks for Onboarding are Employee Self-Service activities. All other tasks are To Dos or Reviews completed by the Absence Partner, Benefits Partner, Faculty Partner, HR Contact, HR Partner and Retiree Partner

**Steps**

1) Employee gets 2 inbox items to update **Personal Information & Contact Information**

2) Once updated, employee clicks **Submit**
3) Initiator (HR Contact) receives the to-do item: Trigger **Benefits Onboarding, Direct Deposit, Privacy Flag, & State Veteran's Preference** for employee.

<table>
<thead>
<tr>
<th>Complete To Do</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trigger Benefits Onboarding Questions, Direct Deposit, Privacy Flag, and State Veteran's Preference for employee</strong></td>
</tr>
</tbody>
</table>

**a. Note:** Do **NOT** submit this to-do before completing steps B-E below.

**b.** Go to worker profile by searching employee name in global Workday search

**c.** From the employee’s **Related Actions** button, select **Additional Data → Edit Effective-Dated Custom Object**

![Worker Profile with Related Actions and Edit Effective-Dated Custom Object]

**d.** Use the employee’s hire date as the **Effective Date**

![Edit Worker Effective-Dated Custom Object]

**Effective Date:** 11/15/2017
e. Click **Submit**

f. Go back and **submit** the to-do item: Trigger **Benefits Onboarding, Direct Deposit, Privacy Flag, & State Veteran’s Preference** for employee.

4) Employee received the tasks in the picture to the right in his/her inbox to complete

a. **Review documents** – employee clicks “I agree” after reviewing each document (list below)
   - New Health Insurance Marketplace
   - HIV/AIDs and the Workplace Notice
   - Payroll Deduction Verification
   - Texas A&M System Policies
   - The Texas Whistleblower Act
   - Worker’s Compensation Notice
   - Uniformed Services Employment and Reemployment Rights Act (USERRA)
   - Texas Hazard Communication Act Notice
   - Ethics, Standards of Conduct & Conflict of Interest Provisions
   - Ethics, Standards of Conduct and Conflict of Interest Provisions
   - Drug and Alcohol Abuse and Rehabilitation Programs
   - The Texas A&M University System Notice of Privacy Practices
   - Employee Rights under the FMLA
   - Equal Employment Opportunity
   - Overtime Policy

b. Employee completes section 1 of the Form I-9

c. Employee updates emergency contacts and submits

d. Employee identifies veteran status and submits

e. Employee identifies disability status and submits

f. Employee completes to-do for prior state service.
   - Form is triggered by the prospective hire form outside of Workday and entered into Workday by Engineering Payroll.

g. Employee is prompted to change photo and submits.

h. Employee completes federal withholding (W-4) elections, clicks “I Agree” and submits.

i. Employee enrolls in electronic W-2 then returns to inbox to submit to-do item.

j. Employee enrolls in electronic 1095-C by following the instructions below.
• Click on the cloud at the top right of the screen
• Click on View Profile
• Go to Actions (under your name)
• Navigate to Benefits→Change 1095C printing election→click ok
• Return to inbox and submit to-do task

k. Employee submits Edit Worker Additional Data Event-State Veteran’s Preference
l. Employee submits Edit Worker Additional Data Event-Privacy Flag
m. Employee submits Edit Worker Additional Data Event-Benefits Onboarding Questions

5) I-9 Processor reviews Section 1 and completes Section 2 of the Form I-9, then clicks Approve
6) HR Partner reviews Form I-9 and submits
7) HR Partner approves Form I-9 by recording E-Verify case number, and submits

Note: Steps 8-12 occur simultaneously

8) Benefits Partner reviews benefits onboarding questions and submits to-do
9) Benefits Partner reviews to-do items below and submits: these are different tasks

10) HR Contact and HR Partner receive 2 tasks. HR Contact should complete these tasks.
   a. **Update Mail Stop** for employee by following the steps below
      • Navigate to the worker’s profile
      • Related Actions→Personal Data→Edit Other ID
      • Click plus sign to add a row for Mail Stop
      • Enter Mail Stop in Identification # field
      • Enter employee’s hire date in Issue Date field.
      • Return to inbox task and submit
   b. **Organization-specific onboarding** activities to-do task. Once internal onboarding is complete, submit to-do task.
      • Use internal onboarding checklist. You can find the **Organization-specific Onboarding Checklist for Texas A&M Engineering in the appendix**
11) Absence Partner: Update time off service date by clicking “Edit Service Dates”

- Absence Partner will use hire date + 6 months as the default entry (Example: If hire date is September 1st, enter March 1st as the Time Off Service Date)
- If the employee has prior state service, Engineering Payroll will update this field upon receipt of the prior state service form from the employee

12) Absence Partner: Complete To-Do; Employee is a rehire. Do they qualify for restoration of Sick time off?

- Click “Maintain Accrual and Time Off Adjustments/ Overrides” and follow instructions.
- Return to inbox to submit the to-do task.

**Helpful Onboarding Reports**

“Onboarding Summary Status” will show where all employees in the organization are in the onboarding process.
Appendix 1: Organization Specific Onboarding Checklist—Texas A&M Engineering

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Start Date</th>
</tr>
</thead>
</table>

This document may be used to assist you in preparing the employee to join your division. Refer to the Hiring Process Document for your hiring scenario (transfer, student, non-affiliated student, staff, and temporary) to assist in completing the onboarding process.

### Access
- □ Staff ID Card (obtain from Engineering Payroll)
- □ Claim NetID
- □ Office Keys
- □ Facility Access

### Office Environment & Security
- □ Parking Permit: Space ________
- □ Employee will request space online: http://transport.tamu.edu
- □ Request email account
- □ Desk Keys
- □ Voice Mail
- □ Business Cards—Date ordered

### Coordinate with Facilities / Building Proctor
- □ Office Space—Room # ________
- □ Office Keys

### Workday
- □ Confirm first month’s accruals are posted correctly.
- □ If transferring from another State of Texas entity obtain confirmed leave balances
- □ Train new employees on use of systems in Workday (hourly workers: Time worksheet for timesheets)

### Accesses Needed for the Position
- □ Canopy/FAMIS
- □ SSO Dept. Roles
  - Submit access request form to Engineer HR
- □ Maestro
- □ Concur
- □ Apeelax
- □ Compass Account (student records)
  - Engr. Student Services & Academic Programs 979.862.4364
- □ Others:

### Coordinate with TEES Fiscal Office as Appropriate
- □ Travel Card—issued in Employee’s Name
- □ Division Purchase Credit Card
- □ (contact TEES Fiscal Office 979.458.7430)

### Engineering Human Resources
- □ Sign Employee up for Onboarding with H.R.
- □ Establish Personnel File: see personnel file reference on HR Web PEERS page

### For Supervisor to Discuss with Employee
- □ Position Description
  - (employee signs & dates, place in personnel file)
- □ Work/Lunch & Overtime
- □ Performance Evaluation Timeline and Form
- □ Conduct and Appearance Expectations
- □ Training & Professional Development
- □ Pay Periods (bi-weekly pay schedule)
- □ Single Sign On
  - (leave request, training, and benefits)
- □ Departmental Information
  - (organizational chart, web page, mail stop, fax number)
- □ Fire Drill & Evacuation Plans
- □ Employee Introductions
- □ Tour of Facilities
- □ Office Equipment issued to Employee
  - (coordinate with departmental property officer)
<table>
<thead>
<tr>
<th>Name</th>
<th>Worklet</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td><img src="image" alt="Heart" /></td>
<td>A worklet linking you to common actions and views related to benefits, including change benefits, beneficiaries and dependents. You can use the worklet to view your benefit elections and current benefits cost.</td>
</tr>
<tr>
<td>Favorites</td>
<td><img src="image" alt="Star" /></td>
<td>A worklet containing favorite reports and tasks for easy access.</td>
</tr>
<tr>
<td>Inbox</td>
<td><img src="image" alt="Envelope" /></td>
<td>A worklet showing your action items, To Dos, and approvals; required for all users and is required on the Home page.</td>
</tr>
<tr>
<td>My Team</td>
<td><img src="image" alt="Team" /></td>
<td>A worklet linking you to common actions and views related to your team, including viewing your direct reports and their employment information (transfer, promotion or change of job). This worklet is being retired in 2018.</td>
</tr>
<tr>
<td>My Team Management</td>
<td><img src="image" alt="Team" /></td>
<td>A worklet linking you to common actions and views related to your team, including viewing your direct reports and their recent activity. For example you can Promote, or Change Job, Add Job, Terminate and Place Worker on Leave here. Finally, you can view important information such as a team comparison, the Organization Directory, Headcount, Management Chain and Timeline.</td>
</tr>
<tr>
<td>Pay</td>
<td><img src="image" alt="Money" /></td>
<td>A worklet linking you to common actions and views related to your pay, including accessing withholding elections and payment elections and viewing payslips, total compensation, bonus and one-time payment history, tax documents and allowance plans.</td>
</tr>
<tr>
<td>Personal Information</td>
<td><img src="image" alt="ID Card" /></td>
<td>A worklet linking you to common actions and views related to your personal information, including changing your contact and personal information (such as your addresses, e-mail and phone number), emergency contacts, photo, legal name, preferred name and government IDs; required for all users and cannot be removed from the Home page.</td>
</tr>
<tr>
<td>Safety</td>
<td><img src="image" alt="Alert" /></td>
<td>A worklet enabling employees, managers and safety partners to report safety incidents.</td>
</tr>
<tr>
<td>Time</td>
<td><img src="image" alt="Clock" /></td>
<td>A worklet linking you to common actions and views related to your time, including entering your time and viewing your time-off balance.</td>
</tr>
<tr>
<td>Time Off</td>
<td><img src="image" alt="Briefcase" /></td>
<td>A worklet linking you to common actions and views related to time off, including viewing your time-off correction, leave of absence, time off &amp; time-off balance.</td>
</tr>
</tbody>
</table>
## Appendix 3: Workday Common Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit event</td>
<td>An event that gives you the opportunity to change your benefit elections.</td>
</tr>
<tr>
<td>Business object</td>
<td>A set of related fields. Instances of a business object include rows in a table or a spreadsheet, with each instance representing a unique occurrence of that type of object. A business object can have no instances, one instance or many instances. Workday automatically links related business objects together. For example, supervisory organization details are linked to a supervisory organization; the supervisory organization is linked to positions; positions are linked to employees; etc.</td>
</tr>
<tr>
<td>Business process</td>
<td>A task that you can initiate, act upon and complete to accomplish a desired business objective. Business processes are created using a combination of actions, approvals, approval chains, To Dos and/or checklists. An action can be a single task or sub-process. Examples of business processes include Hire, Change Job, Request Compensation Change, Terminate Employee etc.</td>
</tr>
<tr>
<td>Drill-down</td>
<td>A feature to view more data in a matrix report. When you click a drillable element (such as a drillable field in the table view), a context menu appears that enables you to select a new View By field. If the Enable Drilldown to Detail Data check box is selected on the Advanced tab of the report definition, you can also select details associated with the selected report element</td>
</tr>
<tr>
<td>Event</td>
<td>A transaction that occurs within your organization, such as hiring or terminating a worker.</td>
</tr>
<tr>
<td>Field</td>
<td>An area that contains data related to a particular primary or related business object.</td>
</tr>
<tr>
<td>Filter</td>
<td>A clickable icon used to narrow down data. Clicking this icon will create a row on your report where you filter data to display from one or more columns</td>
</tr>
<tr>
<td>Full Time Equivalent (FTE) %</td>
<td>The ratio of a worker’s scheduled weekly hours to the weekly hours for the business site. If a worker works 20 hours a week and the business site weekly hours are 40, then the worker’s FTE% is 50%</td>
</tr>
<tr>
<td>Functional Area</td>
<td>A group of tasks, reports and objects. For example, the HCM solution includes functional areas such as Benefits, Talent &amp; Performance, Absence and Manager/Employee self-service. Each of Workday’s solutions is grouped into distinct functional areas</td>
</tr>
<tr>
<td>Headcount</td>
<td>The number of workers in an organization.</td>
</tr>
<tr>
<td>I-9</td>
<td>An employment eligibility verification. A document all workers must complete to verify their identity and employment authorization</td>
</tr>
<tr>
<td>Life Event</td>
<td>A benefit event that occurs in your personal life, such as getting married or having a child.</td>
</tr>
<tr>
<td>Open Enrollment Event</td>
<td>A type of enrollment event that typically occurs once per year system wide. Unlike benefit event enrollment, which is triggered by a life event or job change, an open enrollment event applies to an entire employee and retiree population</td>
</tr>
<tr>
<td>Org Chart</td>
<td>A visual depiction of how an organization is structured. It outlines the roles and responsibilities of and relationships among individuals within an organization</td>
</tr>
<tr>
<td>Performance Review Process</td>
<td>The formal process to establish annual worker goals and conduct the performance evaluation process, which includes review and rating of goals, competencies and position responsibilities</td>
</tr>
<tr>
<td>Pre-Hire</td>
<td>A term used in Staffing to identify individuals (candidates) before employment and used in Recruiting to identify candidates who are in the Offer or Background Check stage</td>
</tr>
<tr>
<td>Roles</td>
<td>A group of people with specific responsibilities and permissions. When a business process runs, the role for each step includes all of the workers in that role in the business process target organization</td>
</tr>
<tr>
<td>Staffing Event</td>
<td>Any event that changes your position or job, such as a hire, a transfer or a promotion</td>
</tr>
<tr>
<td>Supervisory Organization</td>
<td>Workers grouped into a management hierarchy. Supervisory organizations are the primary organization type in Workday. All approvals and checklists are established for the supervisory organization hierarchy, with possible variations for particular organizations within that hierarchy</td>
</tr>
<tr>
<td>Task</td>
<td>An action you must take in a business process, unless you reassign or delegate the task. For example, notifications or inbox alerts are triggered by steps in a business process</td>
</tr>
<tr>
<td>To-Dos</td>
<td>Reminders to do something. They can be part of business processes and must be marked complete before the workflow will go to the next step</td>
</tr>
<tr>
<td>W-4</td>
<td>A withholding allowance certificate. This will inform an employer of how much income tax to withhold from your paycheck</td>
</tr>
<tr>
<td>Worker</td>
<td>A person who is either an employee hired by a company or a contingent (contracted) worker</td>
</tr>
<tr>
<td>Worker Profile</td>
<td>A continuously updated page that provides a view of an employee’s experience, skills, education, etc.</td>
</tr>
<tr>
<td>Worklet</td>
<td>A compact report displayed as an app on your Home page, providing easy access to tasks and information you use on a regular basis, including: Pay, Time Off, Personal Information, and Benefits</td>
</tr>
</tbody>
</table>