

# Human Resource Management System

## Workday Job Aid Onboarding



This Job Aid describes the steps involved for a new employee to manage completing the onboarding process within the County.

- Employees
- People Managers
- Human Resources

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### 1. Onboarding Overview

The purpose of this job aid is to provide you, as the new employee, with guidance on how to complete the onboarding process in Workday. Onboarding is the process of getting you acclimated to the new work environment quickly and efficiently. It also guides you toward completing the documentation required. All of this enables you to feel more at ease and become a productive member of the workforce sooner rather than later. Workday has tools to help achieve this goal. Within this pre-hire stage, you have direct access to Workday to complete tasks necessary to fill out required forms, set up payroll, and other pre-hire functions. You are also able to be brought up to speed with all employee memorandums, county policies, culture, expectations, and the day-to-day responsibilities of your unit.

On the pages that follow, you will learn how you make onboarding a successful part of your hiring process. If you have any questions on any part of this process, reach out to your Human Resources department.

**Note:** Your ability to do certain tasks, later on, is wholly dependent on the completion of preceding screens and fields. You must fill out the applicable fields in each Onboarding task so that you can complete future tasks. It is also important to promptly complete and submit items in your Workday inbox for Onboarding. Not every employee will receive the same tasks in Workday because situations vary.



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### 2. Onboarding Setup (Manager and HR Partner)

The Onboarding Setup step is triggered within the hire process. Once this step is triggered, the manager will receive a notification with further instructions regarding the new employee's onboarding setup:

1. From the Workday Homepage, go to your inbox.
2. Select the message "Onboarding Setup for Hire: [Employee's Name]- Job Title- Date of Hire."
3. You will see defaulted text within the **Message** that will appear for the employee on their Onboarding Dashboard. If you wish, edit/customize this text.
4. Within **People to Meet**, you may select the employees that you wish for this new employee to interact with (employees from your team are automatically defaulted in).
5. The box next to **Notify** should be checked.
6. You may edit the **Notification Subject**.
7. You may edit the **Notification Message**. This message alerts those **People to Meet**, that they were identified as someone that the new hire should interact with during their first week of work.
8. You may edit **Helpful Contacts**: these individuals should be resource persons that may assist the employee in navigating through benefits, orientation, etc.



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**Note:** For your reference regarding Employee Benefits:

Last Name of the employee assigned to the following Employee Benefits

Representatives:

A-C Susan Sheldrick

D-G Grace Dugre

H-K Sherry Wilcox-Mills

L-M Maggie Brown

N-O Robin Vitalino

P-R Sandy Daly

S-Z Diane Bo

9. If you wish to notify the **Helpful Contacts** that they have been identified as a resource person, check the box next to **Notify** and enter a **Notification Message**.
10. Click **Submit**.

Next, the HR Partner must review the Onboarding Setup as established by the new employee's manager:

1. Go to your Workday Inbox and select the message: "Onboarding Setup for Hire:[Employee Name] Job Title"
2. Select the message "Onboarding Setup for Hire: [Employee's Name]- Job Title- Date of Hire."
3. Review the Onboarding Setup. You may edit or add information if you wish.
4. Click **Approve**.

The newly hired employee will begin the Onboarding process. The new hire is given a Workday link (usually given by HR) to access Workday. Please note that the new hire's account is not created until the hire process is completed.

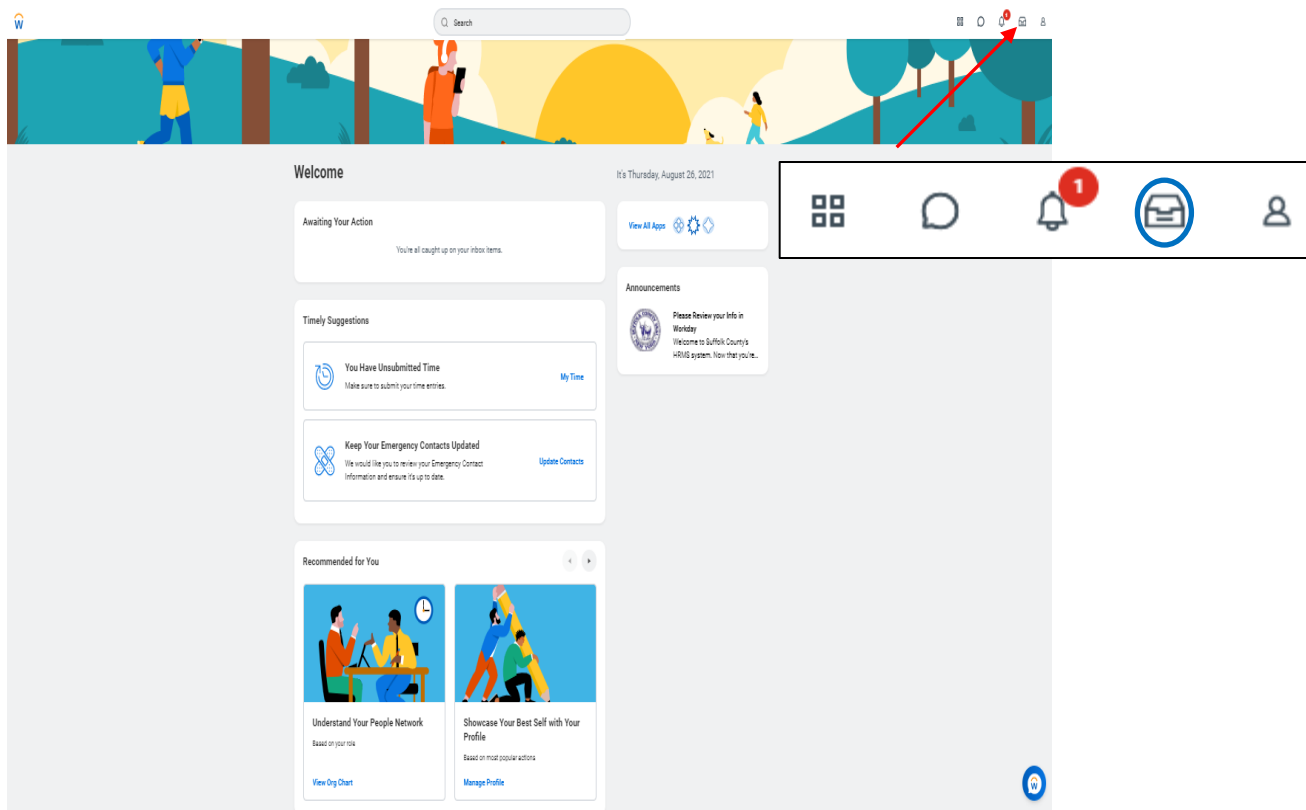


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### 3. Onboarding Dashboard (New Employee)

As a new employee, you were recently given a link from your manager so that you may access Workday. Once you have logged in, you will view the Workday Homepage. You will notice an area labeled "Awaiting Your Action". This is where you will find links to the most recent items added to your Inbox. You can also access your Workday Inbox by clicking on the Inbox icon located at the top right of the page (Circled below).



To open the **Onboarding** application click on the "View All Apps" on the right. This will display a page with all of the applications available to you. Locate the icon labeled Onboarding and click on it to open the application. This gives you access to the Onboarding Dashboard.



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← Onboarding

**Campaign**  
You have required Learning!  
View More

**From My Manager**  
Welcome to the team! We're excited to have you join us. You will play a vital role in helping us reach our objectives. During your first week, please take...

**People to Meet**  
(Retired - Active)  
PARK RANGER I (SEASONAL)  
ADMINISTRATIVE ASSISTANT  
DIR OF MGMT AND RESEARCH  
ADMINISTRATOR I  
View More


**Helpful Contacts**  
SENIOR PERSONNEL ANALYST  
Dir of Research and MGMT

**Onboarding Messages**

**Getting Started**  
0 Completed | 9 Ready  
0% Your Progress  
Go to Inbox

Your Onboarding Dashboard gives you access to a variety of resources:

- You will see required learning within **Campaign** on the top of the page.
- You will see a custom message from your manager on the top left (under **From My Manager**).
- Under **People to Meet**, you will see current employees who are on your team.
- Under **Helpful Contacts**, you will see employees who may serve as a helpful resource for you in navigating through your career at Suffolk County.
- Under **Onboarding Messages**, you will see welcome onboard messages from other county entities (separate from your Workday inbox).
- On the right of the screen, you will see **Getting Started**. This displays the progress you have made so far in completing your Onboarding. There are various steps you must complete to finish the Onboarding process. Please utilize one of your Helpful Contacts if you have additional questions on completing these steps. The steps may be found in your Workday inbox.

When you are ready to begin the Onboarding process, go to your Workday inbox (from the Workday Homepage, you can click the link **Go to your Inbox**, located in the middle left of the page, or you can click the icon  on the top right of the page.



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**Inbox**

Actions      Archive

Viewing: All      Sort By: Newest

- Employee Signature Required - New Hire Documents: ADMINISTRATIVE ASSISTANT - Calvin Klein  
16 hour(s) ago - Effective 12/08/2020
- Deferred Compensation: ADMINISTRATIVE ASSISTANT - Calvin Klein  
16 hour(s) ago - Effective 12/08/2020
- Edit Government IDs  
16 hour(s) ago - Due 01/13/2021
- Harassment Prevention: ADMINISTRATIVE ASSISTANT - Calvin Klein  
16 hour(s) ago - Effective 12/08/2020
- Update Personal Information: ADMINISTRATIVE ASSISTANT - Calvin Klein  
16 hour(s) ago - Effective 12/08/2020
- Update Contact Information: ADMINISTRATIVE ASSISTANT - Calvin Klein  
16 hour(s) ago - Effective 12/08/2020
- All Employee Memos - Reading Required New Hire Documents: ADMINISTRATIVE ASSISTANT - Calvin Klein

You will now see various tasks you must complete/submit to finish the onboarding process.

- [Review and Submit Documents](#)
- [Manage Payment Elections](#)
- [Manage Tax Elections](#)
- [Update Skills and Work Experience](#)
- [Update Personal Information](#)
- [Update Contact Information](#)
- [Confirm Government IDs](#)
- [Photo Change](#)
- [Complete I-9](#)



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### 4. Review and Submit Documents (New Employee)

1. From the list of messages, select the first message, "Employee Signature Required- New Hire Documents: [Job Title] – [Employee Name]."
  - You must sign all documents within this message using e-sign.
  - Once it has been completed, click **Submit**.
2. From the list of messages, select the message, "Notarized Signature Required- New Hire Documents: [Job Title] – [Employee Name]."
  - You must notarize these documents. Please speak with your manager regarding where these notarized documents must be submitted.
  - Once this task has been completed, click **Submit**.
3. From the list of messages, select the message, "All Employee Memos: Reading Required New Hire Documents."
  - Read the attached documents.
  - Once this task has been completed, click **Submit**.
4. From the list of messages, complete the 'To Do' "Maintain Worker Documents."
  - Provide a copy of your social security card.
  - Once this task has been completed, click **Submit**.





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### 5. Manage Payment Elections

From the list of messages, select the message, "Payment Election Enrollment Event." Within this message, you will manage your payment elections (how you will receive your pay from the county).

- Under the **Preferred Payment Method**, select how you wish to be paid for your **Regular Payroll Payment** (you may choose Check, Direct Deposit, or Manual).
- If you select Direct Deposit under the preferred payment method, you will see additional fields populate: **Account Nickname, Routing Transit Number, Bank Name, Bank Identification Code, and Account Type**. Enter the relevant information. Use the check graphic on the screen as a reference to determine what to input within each field.
- Also, select how you wish to be paid for any **Special Payroll Payment** -this may relate to payment upon leaving the county or other special payroll events (you may choose check or direct deposit).
- Select New York under **State**.
- Select the **Withholding Form Type** (most common is IT-2104 – Withholding).
- Click **Ok**.



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### 6. Manage Tax Elections

From the list of messages, select the message, “Complete State and Local Withholding Elections.”

- Your name should be listed under **Worker**.
- Select County of Suffolk under **Company**.
- Select New York under **State**.
- Select the **Withholding Form Type** (most common is IT-2104 – Withholding).
- Click **Ok**.

From the list of messages, select the message, “Complete Federal Withholding Elections.”

**Note:** This screen represents you filling out your W-4 electronically.

- Select your **Marital Status**.
- Check the box next to **Multiple Jobs or Spouse Works** if relevant to you.
- Enter the number of dependents, qualifying children, other dependents, and/or other adjustments.
- If relevant to you, enter **Deductions** and **Extra Withholding**.
- Click the box next to **I agree**.
- Once all relevant fields are completed, click **Submit**.



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### 7. Start Talent Review

1. Select the message 'Update Profile: Talent Review Employee: [Employee Name].'
2. You will now update your talent profile within Workday. Within the message, you will update your information by either using the **Guided Editor** (step-by-step guide to updating the talent profile) or the **Summary Editor** (you can edit everything on one page). Click either **Go to Guided Editor** or **Go to Summary Editor**.

#### If you selected **Go to Guided Editor**:

- **Talent Statement:** Identify your primary performance talents, explain how these abilities show in your performance and work habits.
  - a. Click **Add** under Talent Statement.
  - b. Under **Type**, select **Personal**.
  - c. Write your **Statement**.
  - d. Click **Next**.
- **Job Details:** This information is based on your current job details only. You can review but not update. Your supervisor will be reviewing this information as well once you submit your Talent Review.
  - a. Review the listed information then click **Next**.
- **Job History:** In this section, you will be asked to review your job history external to Suffolk County. Your past experiences help our management team take advantage of the full complement of your talents. If your talent profile does not accurately reflect your external job history, please update it accordingly.
  - a. Click **Add** under Job History.
  - b. Fill in the required information. Try to be as detailed as possible. You may explore additional fields by clicking **Details**.
  - c. You may update pre-existing information listed as well.
  - d. If you wish to add external work experience, click **Add**.
  - e. When you have finished adding/updating your job history, click **Next** at the bottom of the page.



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- **Education:** In this section, you will be asked to review/enter your Education.
  - a. To add education, click **Add**.
  - b. Fill in the required information. You may explore additional fields by clicking **Details**.
  - c. You may update pre-existing information listed as well.
  - d. If you wish to add education, click **Add**.
  - e. When you have finished reviewing/entering your education, click **Next** at the bottom of the page.
  
- **Training:** In this section, you will be asked to review your training inventory (this is training you have previously taken). Enter in your training or update the existing information to make sure it is up to date.
  - a. To add training, click **Add**.
  - b. Fill in the required information. You may explore additional fields by clicking **Details**.
  - c. You may update pre-existing information listed as well.
  - d. If you wish to add additional training, click **Add**.
  - e. When you have finished reviewing/entering your training, click **Next** at the bottom of the page.
  
- **Languages:** In this section, you will be asked to review your languages. Please update your language abilities or proficiencies to reflect your current attainment.
  - a. To add a language, click **Add**.
  - b. Fill in the required information. You may explore additional fields by clicking **Details**.
  - c. You may update pre-existing information listed as well.
  - d. If you wish to add language, click **Add**.
  - e. When you have finished reviewing/entering your languages, click **Next** at the bottom of the page.



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- **Certifications:** In this section, you will be asked to review your certifications. If you have existing certifications or are qualified for new ones, please update your information. Some certifications must be validated and will only update your profile once verified.
  - a. To add a certification, click **Add**.
  - b. Fill in the required information. You may explore additional fields by clicking **Details**.
  - c. You may update pre-existing information listed as well.
  - d. If you wish to add a certification, click **Add**.
  - e. When you have finished reviewing/entering your certifications, click **Next** at the bottom of the page.
- **Talent Summary:** In this section, you will be asked to write a summary talent statement. This statement should be three to five lines describing your strengths, the position you may be interested in seeking (if applicable), and what you will bring to the job.
  - a. Click the pencil symbol to the right of **Employee Summary**.
  - b. Write your **Employee Summary** and **Talent Summary Details**.
  - c. When you have finished, click the check symbol to the right of **Employee Summary**.
  - d. Click **Next**.
- **View your entire talent review:** You will now review all your entered information from each section to verify its accuracy. You may go into each section if preferred and make edits/corrections. When this has been completed, click **Submit** at the bottom of the page.
- You have now submitted your talent review.

### If you selected **Go to Summary Editor**:

- You are now viewing the entire talent review on one page. Go through each section to review/update the information.
- Begin with **Talent Statement**: Identify your primary performance talents, explain how these abilities show in your performance and work habits.
  - a. Click **Add** under **Talent Statement**.
  - b. Under **Type**, select **Personal**.
  - c. Write your **Statement**.
  - d. Click the check box to the right of **Talent Statement** to save your entry.
- Go to the **Job Details** section. This information is based on your current job details only. You can review but not update. Your supervisor will be reviewing this information as well once you submit your Talent Review.



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- Go to the **Job History** section. In this section, you will be asked to review your job history external to Suffolk County. Your past experiences help our management team take advantage of the full complement of your talents. If your talent profile does not accurately reflect your external job history, please update it accordingly.
  - a. Click **Add** under Job History.
  - b. Fill in the required information. Try to be as detailed as possible. You may explore additional fields by clicking **Details**.
  - c. You may update pre-existing information listed as well.
  - d. If you wish to add external work experience, click **Add**.
  - e. When you have finished adding/updating your job history, click the check box to the right of **Job History** to save your entry.
  
- Go to the **Education** section. In this section, you will be asked to review/enter your Education.
  - a. To add education, click **Add**.
  - b. Fill in the required information. You may explore additional fields by clicking **Details**.
  - c. You may update pre-existing information listed as well.
  - d. If you wish to add education, click **Add**.
  - e. When you have finished reviewing/entering your education, click the check box to the right of **Education** to save your entry.
  
- Go to the **Training** section. In this section, you will be asked to review your training inventory (this is training you have previously taken). Enter in your training or update the existing information to make sure it is up to date.
  - a. To add training, click **Add**.
  - b. Fill in the required information. You may explore additional fields by clicking **Details**.
  - c. You may update pre-existing information listed as well.
  - d. If you wish to add additional training, click **Add**.
  - e. When you have finished reviewing/entering your training, click the check box at the right of **Training** to save your entry.



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- Go to the **Languages** section. In this section, you will be asked to review your languages. Please update your language abilities or proficiencies to reflect your current attainment.
    - a. To add a language, click **Add**.
    - b. Fill in the required information. You may explore additional fields by clicking **Details**.
    - c. You may update pre-existing information listed as well.
    - d. If you wish to add a language, click **Add**.
    - e. When you have finished reviewing/entering your languages, click the check box at the right of **Languages** to save your entry.
  
  - Go to the **Certifications** section. In this section, you will be asked to review your certifications. If you have existing certifications or are qualified for new ones, please update your information. Some certifications must be validated and will only update your profile once verified.
    - a. To add a certification, click **Add**.
    - b. Fill in the required information. You may explore additional fields by clicking **Details**.
    - c. You may update pre-existing information listed as well.
    - d. If you wish to add a certification, click **Add**.
    - e. When you have finished reviewing/entering your certifications, click the check box at the right of **Certifications** to save your entry.
  
  - Go to the **Talent Summary** section. In this section, you will be asked to write a summary talent statement. This statement should be three to five lines describing your strengths, the position you may be interested in seeking (if applicable), and what you will bring to the job.
    - a. Click the pencil symbol to the right of **Employee Summary**.
    - b. Write your **Employee Summary** and **Talent Summary Details**.
    - c. When you have finished, click the check symbol to the right of **Employee Summary** to save your entry.
  
  - **View your entire talent review:** You will now review all your entered information from each section to verify its accuracy. You may go into each section if preferred and make edits/corrections. When this has been completed, click **Submit** at the bottom of the page.
  - You have now submitted your talent review.
3. Your manager will now view your submitted talent review. If you accidentally submitted the talent review before completion, contact your manager to send the talent review back to you for additional edits.



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### 8. Update Personal Information

From the list of messages, select the message, "Update Personal information: [Job Title] – [Employee Name]." Depending on if this information was entered on your behalf, verify the information listed is accurate (Name, preferred name, gender, date of birth, etc.). Various fields listed are optional.

- If there are required fields (\* symbol), make sure to fill in the information/verify its accuracy.

**Note:** Information may not have been pre-filled on your behalf. Go through the sections to make sure all required information is filled in.

- Once this task has been completed, click **Submit**.





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### 9. Update Contact Information

From the list of messages, select the message, "Update Contact information: [Job Title] – [Employee Name]."

Depending on if this information was entered on your behalf, verify the information listed is accurate.

- If the information has not been added, click the **Add** button to add your address, phone number, and email.
- If the information listed is not correct or must be updated, click the pencil symbol on the right side of the section to edit the information.
- Some fields listed may be optional.
- Once this task has been completed, click **Submit**.

From the list of messages, select the message, "Change Emergency Contacts."

- Enter all required fields (\* symbol) by clicking the pencil symbol to the right of each section. List your primary emergency contact, including first name, last name, relationship, and phone number.
- If you are missing any information, you will see an error message to go back and add additional information.
- Once this task has been completed, click **Submit**.



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### 10. Edit Government IDs

You may have submitted your social security card previously to a Payroll Representative when first hired. On this page, you will see your social security information displayed, under **Previous** IDs (located in the middle of the screen). Verify the information is correct, then click **Submit**.

**Note:** If you have not yet submitted your social security card, you can enter your social security number on this screen.

- Under **Proposed IDs**, click the + sign to add a row. Under your name, you will find a link labeled **View Profile**. Click on that link.
- Choose the United States of America under **Country** and choose Social Security Number (SSN) under **National ID Type**.
- Under **Add/Edit ID**, enter your social security number. Then click **Submit**.



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### 11. Photo Change

#### Employee:

From the list of messages, select the message, "Photo Change."

- Currently, no photo is uploaded to your Workday account. Upload a photo by clicking the **Select Files** button within the gray area on the screen in the message (or simply drag the photo file into the gray area of the screen).
- When your photo is uploaded, fit the picture within the white frame.
- Click **Ok**. Then click **Submit**.
- Your manager will review and approve your selected photo.

#### Manager:

From the list of messages, select the message, "Photo Change: [Employee Name]."

- Review the photo selected by the employee.
- Select **Approve**, **Send Back**, **Deny** or **Cancel**.



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### 12. Complete Form I-9

#### Employee:

1. From the list of messages, select the message, "Complete Form I-9." You will be filling out your I-9 form electronically through this message.

**Note:** For detailed instructions on how to complete the I-9, click the hyperlink **Form I-9 Instructions**.

- Under **Section I. Employee Information and Attestation**, enter all required fields.
- Next, under 'I attest, under penalty of perjury, that I am (check the following boxes:)' check the box that is relevant to you.
- Under **Signature of Employee**, select the box next to **I agree**.
- Under **Preparer and/or Translator Certification (check one)**, select **I did not use a preparer or translator** (if you did use a preparer or translator, then select and enter the below-required fields).
- Click **Submit**.

#### Payroll Representative:

1. The Payroll Representative must now review Form I-9:
  - Go to your Workday inbox and select "Complete Form I-9: [Employee Name]."
  - Review the information listed within the employee's I-9.
  - List the document(s) provided by the employee and list them in the relevant fields (**List A, List B, and/or List C**).
  - Under **Signature of Employer or Authorized Representative**, check the box next to **I Agree** and fill out the required fields.
  - Attach the documents provided by the employee and listed in **List A, List B, and/or List C** by clicking the **Select Files** button and dragging the files into the gray area.
  - Click **Submit**.



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<b>Change Log</b>				
<b>Revision Number</b>	<b>Date of Change</b>	<b>Affected Lesson</b>	<b>Action</b>	<b>Initials</b>
1.1.1.1	09/15/2021		Log Created	RK
1.1.1.1	09/28/2021	Onboarding Overview	Minor Verbiage Updates	RK
1.1.1.2	01/27/2022	Onboard Setup	Identified HR as the person to provide the new hire with the WORKDAY URL, not their manager.	RK