

# Onboarding

## Onboarding

The objective of this guide is to review the Onboarding inbox actions for new Teammates in their inbox.

## Security Role

- Worker as Self

## Contents

Onboarding.....	1
Update Basic Information .....	1
Update Personal Information .....	2
Change / Add Emergency Contacts .....	2
Review Documents – W4 – Federal Withholding .....	2
Review Documents – W4N – Nebraska Withholding .....	3
Payment Election Enrollment Event .....	3
Name   Complete Form I-9 – Click Open .....	3
Click Review Documents – Parking Application.....	3
Change Benefit Elections – see appropriate User Guide.....	4
Complete Onboarding Experience Survey .....	4

## Onboarding

You will receive two emails.

- One lists your User Name.
- The other one includes your temporary password to log in to begin your Onboarding process.

Click the link in the first email. For the time being, you will have to log in with your User Name and password.

You need to complete the Basic Information and Personal Information steps before the remaining steps will be available to complete.

### Update Basic Information

1. On your Home Page, under Your Top Apps, click Onboarding.
2. In the Getting Started section, click the number above where it says “Ready.”
3. Click on Update Basic Information item – Position / Worker Name.
  - a. Complete all the mandatory fields marked with a red asterisk.
  - b. Click Home Contact Information.
    - i. Primary Address – click Add.
      1. Country.
      2. Address Line 1.
      3. DO NOT enter anything into Address Line 2.
      4. City.
      5. State.

## Onboarding

6. Postal Code.
7. County (NOT Country).
8. Usage, if applicable.
- c. If applicable, type your Primary Home Phone Number.
- d. If applicable, Type Primary Email Address.
  - i. **PLEASE do NOT enter your Work Email Address in the Home Contact Information section!**
- e. Click Submit.

## Update Personal Information

4. Click on Update Personal Information item – Position / Worker Name.
  - a. Select Gender.
  - b. Enter Date of Birth.
  - c. If desired, enter Marital Status.
  - d. Check the box for Hispanic/Latino, IF APPLICABLE.
  - e. Select from the Race/Ethnicity list.
  - f. Select the correct value from the Citizenship Status list.
  - g. If desired, add Disability ... click the Add button.
  - h. If desired, add Military Service ... click the Add button.
  - i. Click Submit.

## Change / Add Emergency Contacts

5. The next step is Change Emergency Contacts. In the Primary Emergency Contact section, update the following information:
  - a. Complete all the mandatory fields marked with a red asterisk.
  - b. You must add a Phone Number or an Email Address.
  - c. Press Submit.
6. You can also add Alternate Emergency Contacts, if needed:
  - a. Complete all the mandatory fields marked with a red asterisk.
  - b. Press Submit.

## Review Documents – W4 – Federal Withholding

7. Click the link for Federal Fillable W-4.
8. Complete all required fields in the form. **Note: you MUST sign the form for it to be considered valid.** If needed, instructions for adding an electronic signature to a PDF are below.

**How to Add a Signature to a PDF:**

  1. Download and open the PDF file in Adobe Acrobat Reader.
  2. Click on Fill & Sign in the Tools pane on the right.
  3. Click Sign, and then Select Add Signature.
  4. A popup will open, giving you three options – Type, Draw and Image. Select an option and complete signature. Once you're done, click the Apply button.
  5. Drag, resize, and position the signature inside your PDF file on the signature line.
9. Save a copy to your computer.
10. Check the I Agree box.
11. Drag and drop your saved W4 document to the grey box OR click Select files.

# Onboarding

## Review Documents – W4N – Nebraska Withholding

12. Click the link for W-4N Fillable 12-2020.
13. Complete all required fields in the form. **Note, you MUST sign the form for it to be considered valid.** If needed, instructions for adding an electronic signature to a PDF are below.  
**How to Add a Signature to a PDF:**
  1. Download and open the PDF file in [Adobe Acrobat Reader](#).
  2. Click on **Fill & Sign** in the Tools pane on the right.
  3. Click **Sign**, and then Select **Add Signature**.
  4. A popup will open, giving you three options – **Type, Draw** and **Image**. Select an option and complete signature. Once you're done, click the **Apply** button.
  5. Drag, resize, and position the signature inside your PDF file on the signature line.
14. Save a copy to your computer.
15. Check the I Agree box.
16. Drag and drop your saved W4N document to the grey box OR click Select files.

## Payment Election Enrollment Event

17. Direct Deposit will populate in the “For Payroll” prompt.
18. Select the Account Type.
19. Enter the Routing Transit Number.
20. Enter the Account Number.
21. Enter the Bank Name.
22. Account Nickname is optional.
  - a. If you need to add other accounts, there is a separate User Guide for that.
23. Click Submit.

## Complete Form I-9

**Complete Form I-9 needs to be completed on or before your first day of employment.**

24. Verify that all of the following fields are correct;
  - a. Name
  - b. Address.
  - c. Date of Birth.
  - d. Social Security Number.
  - e. Email Address.
  - f. Phone Number.
25. Check the correct box in the “I attest” section.
26. Check I Agree.
27. Check the appropriate box in the Preparer and/or Translator Certification section.
  - a. If you check “A preparer(s) and/or ...”, the Preparer will have to complete all sections in the Signature of Preparer or Translator AND check the the I Agree box.
28. Click Submit.

## Click Review Documents – Parking Application

29. Parking Agreement – complete the form to apply for State parking. Read the instructions carefully.
30. Click Submit.

## Onboarding

### Change Benefit Elections – see appropriate User Guide

**Benefit Change New Hire event needs to be completed within 30 days of your first day of employment.**

### Complete Onboarding Experience Survey

This questionnaire will show up in your Workday Inbox two weeks after your start date.

31. Open and complete the survey.
32. Click Submit.