

(Last Revised: 01/20/2017)

Quick Reference Guide: *Onboarding (New Hire Tasks)***Welcome to the University!**

- Workday is the University of Chicago's Human Resources Information System and before your start date, there are required new hire tasks that need to be completed by logging in to Workday.
- To get started, visit: workday.uchicago.edu and click on the Login link. You will need to activate your CNET ID, in order to login.
- If you are a foreign national employee, you will be required to upload the UPP-192 document. Please contact your department's HR Administrator for more information about this document.

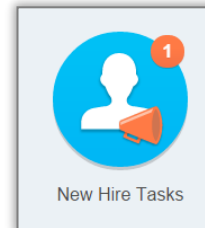
Information Needed

Once logged in, Workday will prompt you to enter the following (in no particular order):

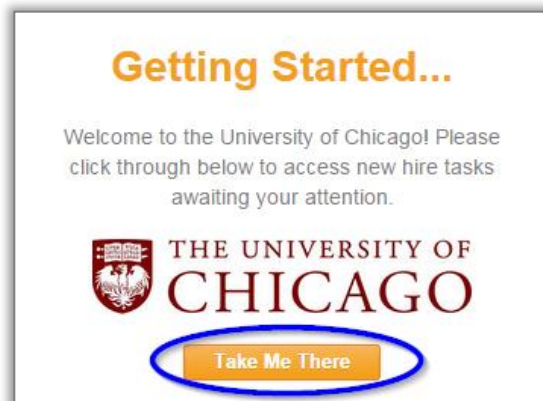
- Personal Information
- Contact Information
- Emergency Contacts
- Review & Acknowledge Documents
- Complete Federal Withholding Elections (Federal W-4)
- Complete Section 1 of the Form I-9
- Review Self ID of Disability Acknowledgement
- Veteran Status Identification

Steps:

1. From the Home page, click the **New Hire Tasks** worklet.



2. In the **Getting Started** section, click **Take Me There**.



Quick Reference Guide: *Onboarding (New Hire Tasks)*

3. To start completing your new hire tasks, click **View Inbox** under the **Your Onboarding Checklist** section.

Please review **“What to complete before your first day?”** This section contains important information regarding the Form I-9 requirement for all employers in the United States.

IT IS IMPORTANT THAT ALL OF THESE STEPS ARE COMPLETED IN THEIR ENTIRETY. IF ANY STEPS REMAIN IN AN INCOMPLETE STATUS, YOUR NEW HIRE INFORMATION WILL BE UNABLE TO BE SENT TO HUMAN RESOURCES FOR PROCESSING. THE ONBOARDING PROCESS IS NOT COMPLETE UNTIL THERE ARE NO MORE ACTION ITEMS IN YOUR INBOX AND YOUR ONBOARDING WORKLET HAS DISAPPEARED.

Onboarding

Welcome

- What to complete before your first day** On or before your first day of work, you will need to complete the following steps in Workday by navigating to your inbox. -Enter
- Important Information for Benefits Eligible Employees** In order to select your benefit elections, you must wait until the Benefit Change task appears in your inbox. Please do not selec...


Your Onboarding Checklist

You have onboarding actions to complete in your Workday inbox:

[View Inbox](#)

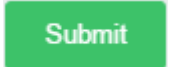
(Last Revised: 01/20/2017)

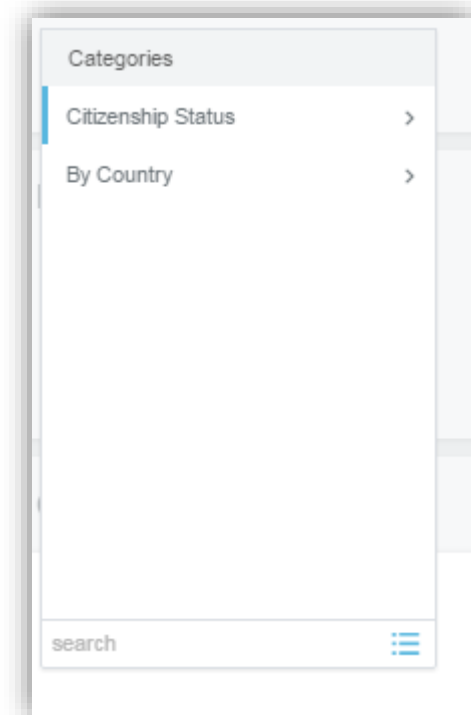
Quick Reference Guide: *Onboarding (New Hire Tasks)*

4. On the **Enter Personal Information** screen, use the **Edit Icon**  to update your Personal Information including Gender, Date of Birth, Marital Status, Ethnicity, Citizenship Status, Disability and Military Service. **Gender, Date of Birth** and **Citizenship Status** are required.
5. Regardless of your United States citizenship status, or your citizenship status in other countries, you will need to select the **Citizenship Status** filter when using the **Search Prompt** and select a **Citizenship Status** that lists United States of America next to the name. If you are unsure of your status, select **Unkonwn**.

**IMPORTANT INFORMATION FOR FOREIGN**

NATIONAL EMPLOYEES: By selecting a citizenship status other than **U.S. Citizen** or **Permanent Resident**, another task will appear in your **inbox**. This task will instruct you to upload the **UPP 192**. Please contact your HR Administrator for more information on this form. Your HR Administrator may upload this form on your behalf, however you must click **Submit** on this task in order for your hire to be approved.

6. Click on the **Submit Icon**  to submit this task.
7. You will see the next task to complete.





Quick Reference Guide: *Onboarding (New Hire Tasks)*

8. Use the **Edit Icon**  to update your **Home Contact Information**.

Home Contact Information

Primary Address



Address
1234 Main Street, Chicago, IL 60618  

Usage

Visibility
Private



Additional Address

Primary Phone

Phone
+1 312-555-1212 (Home)  

Additional Phone

Primary Email



Address *
lmcneil@gmail.com  

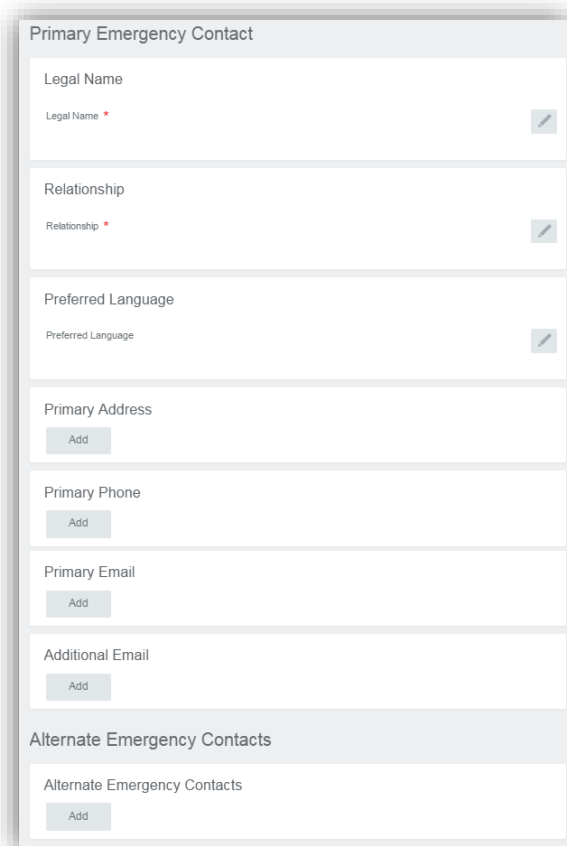
Additional Email

9. Click on the **Submit Icon**  to submit this task.

Quick Reference Guide: *Onboarding (New Hire Tasks)*

10. Return to your Inbox and click **Refresh** button if no action item appears. Elect the **Change Emergency Contacts** task.

11. Use the **Edit Icon**  or **Add Icon**  to update your Primary and Alternate Emergency Contact Information.



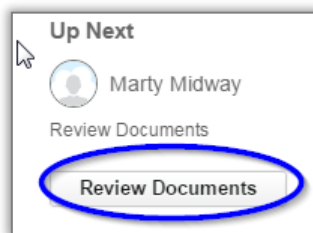
The screenshot shows a form titled "Primary Emergency Contact" with the following sections:

- Legal Name:** A text input field with a red asterisk and an edit icon.
- Relationship:** A text input field with a red asterisk and an edit icon.
- Preferred Language:** A text input field with an edit icon.
- Primary Address:** A section with an "Add" button.
- Primary Phone:** A section with an "Add" button.
- Primary Email:** A section with an "Add" button.
- Additional Email:** A section with an "Add" button.
- Alternate Emergency Contacts:** A section with an "Add" button.

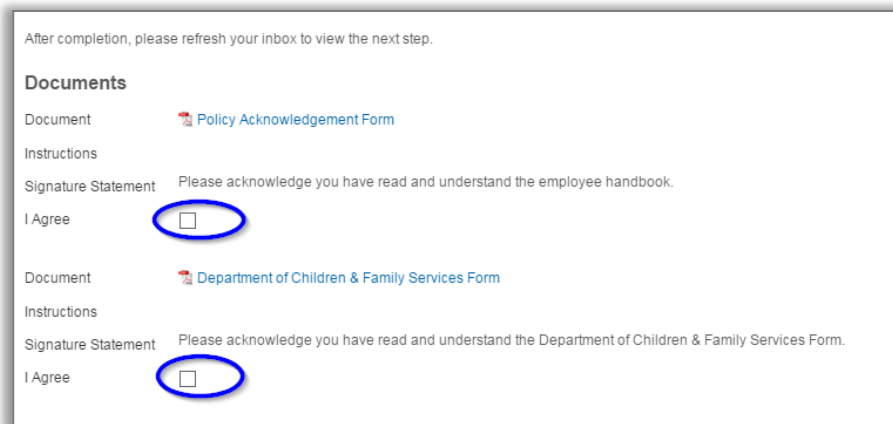
Quick Reference Guide: *Onboarding (New Hire Tasks)*

12. Click on the **Submit Icon**  to submit this task.

13. You will see the next task to complete.




14. Click to open and review each document. Then, select the **I Agree** checkbox.



After completion, please refresh your inbox to view the next step.


Documents

Document  [Policy Acknowledgement Form](#)

Instructions

Signature Statement Please acknowledge you have read and understand the employee handbook.

I Agree

Document  [Department of Children & Family Services Form](#)

Instructions

Signature Statement Please acknowledge you have read and understand the Department of Children & Family Services Form.

I Agree

15. Click on the **Submit Icon**  to submit this task.

(Last Revised: 01/20/2017)


Quick Reference Guide: *Onboarding (New Hire Tasks)*

16. Return to your Inbox and select the **Complete Federal Withholdings** task.

W-4 Data

Last Name Differs from SS
If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card.

Nonresident Alien
If you are a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Marital Status * 
If married, but legally separated, or spouse is a nonresident alien, choose "Single".

Number of Allowances
Total number of allowances you are claiming (from the applicable worksheet on the Form W-4 instructions).

Additional Amount
Additional amount, if any, you want withheld from each paycheck

Exempt
I claim exemption from withholding for 2014 and I certify that I meet both of the following conditions for exemption.
 * Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and
 * This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.
 If you meet both conditions, click the Exempt Box.

LEGAL NOTICE
Your Name and Password are considered as your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are certifying that:

1. Under penalties of perjury, you declare that you have examined this certificate and to the best of your knowledge and belief, it is true, correct, and complete.
2. You understand that your payroll tax withholding election is a legal and binding transaction.
3. You understand that all submissions are contingent upon acceptance by your Payroll representative.

If you do not wish to use the electronic signature option, please cancel this transaction and access the IRS website (www.irs.gov) to download a current year W-4. Manually fill out the form, sign it, and send it to your Payroll Partner.
 The form is not valid without a signature.

I Agree *




Be sure to complete all fields that are applicable. **Marital Status** and the **I Agree** checkbox are required.

17. Click on the **Submit Icon**  to submit this task.

18. You will see the next task to complete.

Up Next

 Marty Midway

Complete Form I-9

(Last Revised: 01/20/2017)

Quick Reference Guide: *Onboarding (New Hire Tasks)*

19. In Section 1, complete all fields marked with a red asterisk. These include **Last Name**, **First Name**, **Address**, **State**, **Zip Code** and **Date of Birth**. Social Security Number is an optional field on this form.

*NOTE: Foreign National employees should NOT enter a placeholder SSN in this field. The Placeholder SSN should be entered on the **Enter IDs** step.*

Section 1. Employee Information and Attestation

Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.

Last Name * McNeil First Name * Logan Middle Initial Other Names Used (if any) N/A

Address * Apt. Number City or Town * State *

Zip Code *

Date of Birth * MM / DD / YYYY Social Security Number Email Address Telephone Number +1 312-555-1212

20. Under the citizenship section, select the option that applies. Also, check the **I Agree** checkbox.

I attest, under penalty of perjury, that I am (check one of the following):

A citizen of the United States

A noncitizen national of the United States (See instructions)

A lawful permanent resident (Alien Registration Number/USCIS Number):

An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy) N/A

For aliens authorized to work, provide your Alien Registration Number/USCIS Number OR Form I-94 Admission Number:

1. Alien Registration Number/USCIS Number:

OR

2. Form I-94 Admission Number:

If you obtained your admission number from CBP in connection with your arrival in the United States, include the following:

Foreign Passport Number: N/A

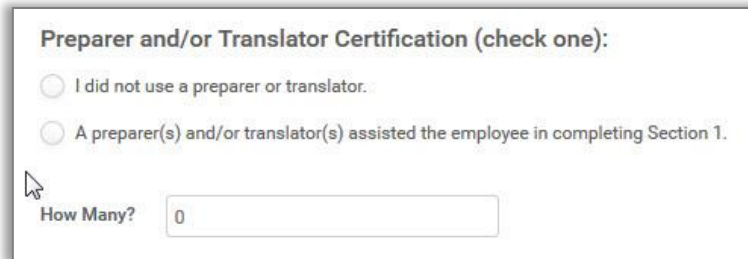
Country of Issuance: (empty)

By checking the I Agree check box, I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I Agree *

Quick Reference Guide: *Onboarding (New Hire Tasks)*

21. Indicate whether or not you used a translator and/or preparer to help complete Section 1 in the **Preparer and/or Translator Certification**. If you did use either a preparer or a translator, they should complete the **Signature of Preparer or Translator** section.



Preparer and/or Translator Certification (check one):

I did not use a preparer or translator.

A preparer(s) and/or translator(s) assisted the employee in completing Section 1.

How Many?

22. When you select the “I Agree” box, you will see the following alert:



By checking the I Agree check box, I acknowledge that I have read the attestation.

I Agree * 

Alert - I Agree

Empty Form I-9 fields in 'Section 1. Employee information and Attestation' are printed with the value N/A indicating they are not applicable.


Preparer and/or translator Certification (check one).

This is to inform you that, in compliance with federal guidelines, an “N/A” will be printed in any field you have left blank, since blank fields are not permitted on the I-9.

23. Click on the **Submit Icon**  to submit this task.


(Last Revised: 01/20/2017)

Quick Reference Guide: *Onboarding (New Hire Tasks)*

- 24.** Return to your Inbox and select **Disability Self-Identification**. Review the information provided regarding why you are being asked to complete this form and how do you know if you have a disability. Select one of the options provided and click on the **Submit Icon**  to submit this task.

Please select one of the below:

- YES, I HAVE A DISABILITY (or previously had a disability)
- NO, I DO NOT HAVE A DISABILITY
- I DO NOT WISH TO ANSWER

- 25.** Return to your Inbox and select **Veteran Status Identification**. Review the information provided regarding why you are being asked to complete this form and the protected veteran status classifications. Select one of the options provided and click on the **Submit Icon**  to submit this task.



Please select one of the below:

- I AM NOT A VETERAN
- IDENTIFY AS A VETERAN, JUST NOT A PROTECTED VETERAN
- IDENTIFY AS ONE OR MORE OF THE CLASSIFICATIONS OF PROTECTED VETERANS
- I DO NOT WISH TO SELF-IDENTIFY


- 26.** Return to your Inbox and select the **Edit Government IDs** task.



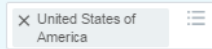
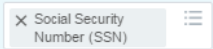


(Last Revised: 01/20/2017)

Quick Reference Guide: *Onboarding (New Hire Tasks)*

27. Click on the **Add Icon**  to enter your social security number under the **National IDs** section of this page. Use the **Prompt Icon**  to select the **United States of America** as the **Country**, and the **Social Security Number** as the **National ID Type**.

Proposed IDs

National IDs 1 items 

	*Country	*National ID Type	Identification #	Issued Date	Expiration Date	Issued By	Series
	 United States of America	 Social Security Number (SSN)	123-45-6789	MM / DD / YYYY 	MM / DD / YYYY 		

For foreign national employees that have been issued a temporary placeholder SSN, enter that number in place of the Social Security Number. Once your permanent Social Security Number has been issued by the Social Security Administration, navigate back to this task (Government IDs) to replace the Placeholder with the permanent SSN.

28. Remember, your onboarding process is not complete until you have no more items in your inbox.