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.**
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 **Unknown**.

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

- **Primary Address**
  - Address: 1234 Main Street, Chicago, IL 60618
  - Usage:
  - Visibility: Private

- **Additional Address**
  - Add

- **Primary Phone**
  - Phone: +1 312-555-1212 (Home)

- **Additional Phone**
  - Add

- **Primary Email**
  - Address: jmonell@gmail.com

- **Additional Email**
  - Add

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

15. Click on the **Submit Icon** to submit this task.
16. Return to your Inbox and select the **Complete Federal Withholdings** task.

- **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, 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** 0.00
  - Additional amount, if any, you want withheld from each paycheck.
- **Exempt** □
  - I claim exemption from withholding for 2017 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.

**I Agree**

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

18. You will see the next task to complete.

**Up Next**

- **Marly Midway**: Complete Form I-9
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.

20. Under the citizenship section, select the option that applies. Also, check the I Agree checkbox.
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](image)

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

![Alert - I Agree](image)

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.
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.

![Disability Self-Identification Form]

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.

![Veteran Status Identification Form]

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.
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.

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.