

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 **Steps** **APP-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

1. Navigate to your **Inbox**. You can do this by clicking on the **Awaiting Your Action** section on the home page, or the tray icon



in the upper right-hand corner of the screen. You can also find all of your new hire tasks by clicking on "View All Apps" in the **Quick Tasks** section of the home page and selecting **New Hire Tasks**. (This app will disappear when all of your new hire tasks are completed.)

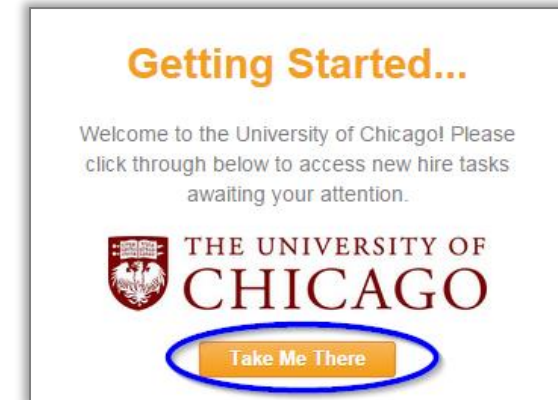


(Last Revised: 03/30/2022)

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2. If you went through the **New Hire Tasks** app, in the **Getting Started** section, click **Take Me There** and click **View Inbox** under the **Your Onboarding Checklist** section.

You may also wish to 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. If you are eligible for benefits, there will be an additional link with important information regarding the process of selecting benefit elections.



Onboarding Landing Page

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 your personal information-Enter your contact and emergency con...
- 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 select the Benefits logo on the homepage of Workday until you have full...

Your Onboarding Checklist

You have onboarding actions to complete in your Workday inbox:

[View Inbox](#)




It is **extremely** important that all onboarding steps are completed **in their entirety**. If any steps remain incomplete, your new hire information will not be sent to Central HR for processing. **Your onboarding process is not complete until there are no more action items in your inbox.** Delays in completing onboarding may lead to delays in receiving your first paycheck.

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You will receive two phases of onboarding, each with multiple tasks. The tasks may or may not be in the same order in your inbox as they are in this guide. Some categories of workers will not receive certain steps: for instance, student workers will not have to complete the employment affiliate questionnaire, those working outside the US will not receive an I-9, staff employees will not receive the Conflict of Interest agreement, and contingent workers will not have to enter tax withholdings. If you believe you are missing an onboarding step, please reach out to your local HR department and/or the Shared Services office.

3. Enter Personal Information



- a. On the **Enter Personal Information** screen, use the **Edit Icon**  to update your Personal Information including Gender, Date of Birth, Marital Status, Race/Ethnicity, and Citizenship Status. **Gender, Date of Birth** and **Citizenship Status** are required.
- b. If you have any questions or concerns about the data collected or our use of the data, please read the Employee and Job Applicant Data Privacy Notice, located at the following link:
<http://humanresources.uchicago.edu/fpg/policies/Employee%20and%20Applicant%20Data%20Privacy%20Notice%20Draft%20for%20Publication%20on%205-15-2018.docx>
- c. Please note that the Race/Ethnicity options are exclusive of the Hispanic or Latino option. If you wish to identify only as Hispanic or Latino, please check the “Hispanic or Latino” box and do not select a Race/Ethnicity option.
- d. Regardless of your citizenship status in other countries, you will need to select your citizenship status as it pertains to the United States. Click the **Recommended** 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. The task will remain in your inbox unless and until you click **Submit**.

- e. Click the **Submit Icon**  to submit this task.

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- a. Some contact information may have defaulted in from your job application or prior employee record, if applicable. Please review any preexisting information and update it if necessary.
- b. Click on the **Edit Icon**  in the **Primary Address** section. Use the **Prompt Icon**  to select the **Country** you live in.
- c. Enter the **Address, City, State, and Postal Code** in the corresponding text fields. Do not include any punctuation (periods, commas, dashes, etc.) **at all** in these text fields.



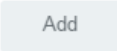



If you have entered **any punctuation at all** in the text fields of an address, you will not be able to submit the task.

For street directions, use “N” or “North” instead of “N.”

For street abbreviations, use “St” or “Street” instead of “St.”

For apartment numbers, use “1” instead of “#1” or “No. 1”

- d. If you are currently working from home, select “Work from Home” in the **Usage** field and enter the appropriate **Number of Days Per Week**. You do not need to enter any other usage types. When finished, click outside the Address section to move on.
- e. Click on the **Edit Icon**  in the **Primary Phone** section. Use the **Dropdown Icon**  to select the **Phone Device** type and enter the **Phone Number** in the text field. When finished, click outside the Phone section to move on.
- f. Click the **Add Icon**  in any of the rows to add additional information and click the **Edit Icon**  in rows with existing details to change the information.








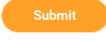
Your **Business Location** and **Primary Work Address** cannot be edited; this information reflects your work location. If this is incorrect, please contact your local HR department to have it updated.

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Your **Primary Work Email** will always default to your @uchicago.edu email address once claimed. Any changes to this field will be automatically overwritten. Please enter any additional work emails (such as @bsd.uchicago.edu or @chicagobooth.edu addresses) in the **Additional Email** section under **Work Contact Information**.

- g. Click the **Submit Icon**  to submit this task.

5. Change Emergency Contacts


- a. Click on the **Edit Icon**  in the **Legal Name** section.
- b. Use the **Prompt Icon**  to select the **Country** where the contact lives. “United States of America” is the default.
- c. Enter the **First Name** and **Last Name** (or other name types) in the corresponding text fields.
- d. Click on the **Edit Icon**  in the **Relationship** row and use the **Prompt Icon**  to select the **Relationship** type.
- e. Click the **Add Icon** in any of the rows to add additional information about your emergency contact and click the **Edit Icon**  in rows with existing details to change the information. The minimum information necessary for an emergency contact is a primary email address or a primary phone number, but you may enter as much additional information as you like.
- f. Click on the **Submit Icon**  to submit this task.

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- a. For PDF documents, click on the PDF icon to open each document. Carefully review the details.
- b. To save a copy of any PDF document, click on the **Download** icon  in the upper right-hand corner of the screen. Click on the **Print** icon  next to it to print a copy.
- c. For linked documents, click on the **Document Link** to open the document. Carefully review the details, as well as any additional information included on the Document Review screen.
- d. Select the **I Agree** checkbox for each document.
- e. Click the **Submit Icon**  to submit this task.

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

7. Complete Federal Withholding Elections

- a. Review the help text and then scroll down to the W-4 Data section. Complete the Federal W-4 form by updating the following where applicable:
 - Marital Status – use the **Prompt Icon**  to select your marital status. This field is required.
 - Multiple Jobs or Spouse Works
 - Number of Qualifying Children Under Age 17
 - Number of Other Dependents
 - Override Total Dependent Amount
 - Other Income (not from jobs)
 - Deductions
 - Extra Withholding – additional amount, if any, you want withheld from each paycheck


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- Exempt – check this box if applicable
- Nonresident Alien checkbox – check this box if applicable

(Please note that the fields and available values on the federal W-4 are subject to change by the federal government. If there has been a recent change in the federal W-4, the fields above may not be accurate. Please reach out to the Payroll department if you have questions.)

- b. Click the **Submit Icon**  to submit this task.

8. Complete State and Local Withholding Elections


- Select the **State** where you would like to complete withholding elections, and (if applicable) the **Withholding Form Type**. Not all states offer tax withholding, and not all states have multiple withholding form types. Click **OK** to proceed.
- The fields and values that appear on the next screen will depend on the selections made in the previous step. If you are unsure how to fill out the withholding form, you can click the **View Blank Form** button for a PDF copy of the paper version of the form, or contact the Payroll department.
- Click the **Submit Icon**  to submit this task.

9. Complete Form I-9

- 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.

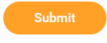
Section 1. Employee Information and Attestation

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.

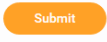
Last Name *	McNeil	First Name *	Logan	Middle Initial		Other Names Used (if any)		N/A	<input type="checkbox"/>
Address *		Apt. Number		City or Town *		State *			
Zip Code *									
Date of Birth *	MM / DD / YYYY		Social Security Number	__-__-____	Email Address		Telephone Number	+1 312-555-1212	

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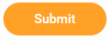
*NOTE: Foreign National employees should NOT enter a placeholder SSN in this field. The Placeholder SSN should be entered on the **Enter IDs** step.*

- b. Select the citizenship option that applies and enter any additional required information (foreign passport number, USCIS number, etc.) Also, check the **I Agree** checkbox.
- c. 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.
- d. Click the **Submit Icon**  to submit this task.



10. Change Self-Identification of Disability

- a. Review the information provided regarding why you are being asked to complete this form and the definition of disability.
- b. Select one of the options provided.
- c. Click the **Submit Icon**  to submit this task.

11. Change Veteran Status Identification



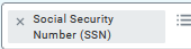


- a. Review the information provided regarding why you are being asked to complete this form and the protected veteran status classifications.
- b. Select one of the options provided.
- c. Click the **Submit Icon**  to submit this task.

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- Click on the **Add Icon**  to add a new row in the **National IDs** table.
- Use the **Prompt Icon**  to select the **United States of America** as the **Country**, and the applicable **National ID Type** (Social Security Number or Individual Taxpayer Identification Number). If you would like to include additional
- Enter the ID number in the **Add/Edit ID** field, as well as the **Issued Date** and/or **Expiration Date** if applicable.

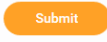
Proposed IDs

National IDs 1 item


	*Country	*National ID Type	Current ID	Add/Edit ID	Issued Date	Expiration Date	Issued By	Series	Verification Date
				123-45-6789	MM/DD/YYYY 	MM/DD/YYYY 			03/30/2022

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 (Edit Government IDs) to replace the placeholder with the permanent SSN.


13. Change Year-End Tax Document Printing Options

- Review the instructions on the task. Determine whether you would like to receive your year-end tax documents as a paper copy, an electronic copy, or both.
- If you would like to opt out of receiving a paper copy of your year-end tax documents, follow the provided instructions to change your printing elections.
- If you are not able to complete the My Tax Documents task, please submit the task in order to move forward. You will be able to change your tax document printing elections at any point after your first day of work.
- Click the **Submit Icon**  to submit this task. This task will remain in your inbox unless and until you click **Submit**.

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- a. Review the task instructions.
- b. Select “Yes” or “No” to indicate whether you have previously been employed by a University of Chicago affiliated employer (including, but not limited to, the Marine Biological Laboratory, the University of Chicago Medical Center, and UChicago Argonne LLC.)
- c. If your answer to the first question was “Yes,” please indicate your position title at the UChicago affiliate.
- d. If your answer to the first question was “Yes,” please indicate your dates of service at the UChicago affiliate.
- e. Click the **Submit Icon**  to submit this task.

15. Complete Conflict of Interest Agreement

- a. Review the task instructions.
- b. Click on the provided link to AURA to complete your conflict of interest agreement.
- c. If you are receiving this task before your official start date, and you are unable to complete the Conflict of Interest agreement in AURA, please submit this task to move on. You will receive another reminder to complete the Conflict of Interest form after your start date.
- d. **Workday and AURA are separate systems.** If you need assistance logging in to AURA, contact AURA-Help@uchicago.edu.
- e. Click the **Submit Icon**  to submit this task. This task will remain in your inbox unless and until you click **Submit**.

Your HR Partner will need to review and approve some of your onboarding tasks before you receive the final onboarding task. They will need to complete Section 2 of the I-9, for instance, and your contact change may also need approval depending on the specific values. You should receive an email notification when the next phase of onboarding is ready for your action; please keep an eye on both your email and your Workday inbox.

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- a. Review the provided information on the University of Chicago's COVID-19 policies and the action required from you.
- b. Please complete the steps applicable to your situation **before** you click the checkbox.
- c. When you have submitted your proof of vaccination or exemption request, select the **I Agree** checkbox.
- d. Click the **Submit Icon**  to submit this task.