This process is required in order to start work as a Florida Atlantic University employee.

Welcome to Florida Atlantic University!

Onboarding is completed by the new or returning employee.

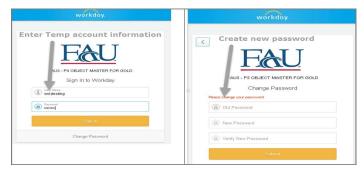
The employee will receive an email from workday@fau.edu with a URL address for Workday (where onboarding will take place), a temporary user name and a series of steps to be completed. A temporary password will be sent in a separate email.

The onboarding process needs to be completed in the Workday system prior to the first day of employment.

For assistance with the onboarding process, contact the Human Resources department at <u>hres@fau.edu</u> (for non-student employees), <u>stuemp@fau.edu</u> (for student employees) or call 561-297-6156.

ONBOARDING OVERVIEW

- Log into the FAU Onboarding website using the URL, temporary user name and password received in the onboarding email from workday@fau.edu. NOTE: this is a nonresponsive account. Do not send emails to it.
- When you first log into Workday with your temporary account information, you will be asked to change your initial temporary password.



The new password will need to be 8+ characters containing both upper and lower case letters, at

least 1 number, and a symbol (Ex. !, %, \$, ?, etc.).

- Once logged into the Workday system, your inbox will have a series of **To Do** tasks that are required in order to complete your employee record.
- 4. Review the instructions for each of these tasks carefully and follow each step; the next transaction will not appear until each prior task is successfully completed. Some of the tasks will kick off additional tasks. Watch the inbox for an orange bar indicating that you need to refresh your page to view the additional tasks.
- After completing the onboarding steps, you will receive an email letting you know that your FAU Net ID has been generated and your permanent FAU account is ready to be activated.

Once you receive the activation email, your temporary account information will no longer be valid and you will need to activate your FAU account. Activation of your FAU account also gives you access to many FAU services including your FAU email.

ONBOARDING STEPS

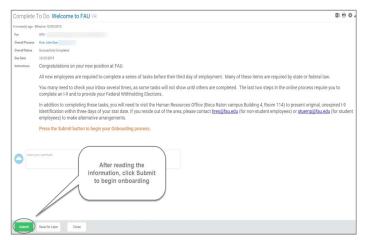
 The first time you log into Workday, the system will default to a Welcome screen. Click on Let's Get Started:



7. Click on your **Profile**, then click on your **Inbox**.



 The onboarding process begins with a Welcome to FAU notice that includes instructions for the onboarding process. Read the information and click **Submit** to begin onboarding.



An orange bar will appear in the inbox, notifying you of new inbox items. Click the bar to refresh the page.

Inbox		
Actions S Viewing: All v	Archive 1	You have marked as Complete Onboarding for John Doe
Welcone to FAU 4 minute() ago-Effective 100		Click the orange bar to refresh the page and begin onboarding

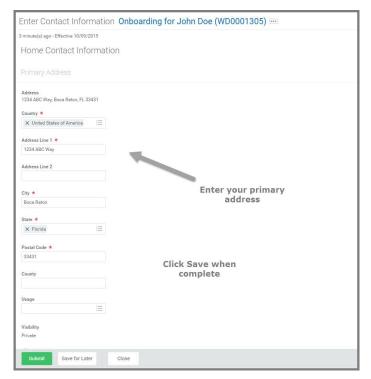
 The onboarding process begins with five (5) tasks that need to be completed. Click on each task and complete. When finished with a task, select the next until all have been completed.

Actions 3 Archive 1 Vewing: All v Sort By: Newest v v		Edit Governme 3 minute(s) ago - Due 10,		The onboarding process begins with 5 tasks to complete				
Edit Government IDs 3 minute(s) ago - Due 10/11/2015		Proposed IDs						
Change Emergency Contacts 3 minute(s) ago-Due 10/11/2015	ŵ	0	*Count	"National ID Type	Identification #	Issued Date	Expiratio	
Add Payment Elections 3 minute(s) ago - Due 10/11/2015; Effective 10/09/2015	ŵ 🗖	*				No Data		
Enter Contact Information: 01002634		Additional Governmen	t IDs 0 items					
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NOTE: The tasks may not be in the order listed on this job aid.

Enter Contact Information task:

- **10.** Enter your contact information. If it is already showing, confirm the information is correct, edit if needed.
- 11.Click Add under Primary Address. Enter a valid mailing address and click ✓ when complete.



- 12. Enter an Additional Address, if applicable
- 13. Click Add under Primary Phone. Select the Phone Device, then enter the Area Code, and Phone Number. Click ✓ when complete.



- Enter any Additional Phone numbers, if applicable.
- Verify the correct Email Address is listed, edit if needed.

16. Click Submit.

Edit Government ID's:

NOTE: This action requires a social security number to be entered. If you do not have a social security number, do not proceed with the rest of Onboarding until you are issued one.

- 17. Click the Plus (+) button under National IDs.
- Use the Prompt icon (<) under Country to search for United States of America

Edit Govern 3 minute(s) ago - Du Proposed IDs	1ment IDs John 10/11/2015	n Doe 🚥		
National IDs 1 ita				
0	*Country	*National ID Type	Identification #	
Additional	referred Countries United States of America	Only State Conta	select United as of America. ct HR if you do have a SSN#	fication #
*Cor		Identificatio	n # Issued Date	Exp

NOTE: Do not use any other country besides United States of America.

19.For the **National ID** Type, select **Social Security Number (SSN).**

Nationa	I IDs				
0	*Country	*National ID Type	Identification #	Issued D	
Θ	United States of America 🛛 🗐	Social Security Number (.) search	2	
Additio	nal Government IDs		U.S. Individual Taxpayer Identification		
0	*Country	*Government ID Type	Number (ITIN)		
				p Da	

- **20.** Enter your SSN in the **Identification #** field.
- **21.**Leave the **Issue Date** and **Expiration Date** fields blank.
- 22.Click Submit.

Enter Personal Information task:

23.Legal Name and **Preferred Name** will automatically populate. Edit the information if needed.

NOTE: When editing your Legal Name, please include your middle name, if applicable.

- 24. Click on the Edit icon () to update your LegalName, if it differs from what appears. ClickDone when complete.
- **25.**If you have a **Preferred Name** that you would like listed, click on the Edit icon (**1**), add the preferred name and click ✓ when complete.

mation Onboarding for John Doe	¢ /
5	
Enter any name changes to Legal Name or Preferred Name, if applicable	
Click the Edit icon to begin editing the name	
2	
Enter changes and click Save	
	" Enter any name changes to Legal Name or Preferred Name, if applicable Click the Edit icon to begin editing the name

New employees

26. Click the Edit icon (🕜) for each field under

Change Personal Information and select the appropriate response.

This includes the following fields:

- Gender
- Date of Birth
- Marital Status
- Ethnicity
- Citizenship Status
- Disability, if applicable
- Military Service, if applicable
- 27. Click Submit when complete.

Change Emergency Contacts task:

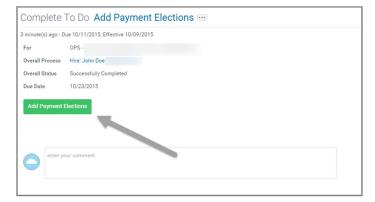
- 28. To enter the Legal Name for an emergency contact click on the Edit icon (), enter the First Name and Last Name, then click ✓.
- **29.** Enter the **Relationship** of the emergency contact by clicking on the Edit icon (), and selecting the appropriate relationship from the drop down menu.



- **30.** Enter at least one contact information for the emergency contact by clicking on **Add** and entering the appropriate information.
 - Primary Phone is recommended.
- **31.Alternate Emergency Contacts** may be entered by clicking on **Add** and entering the appropriate information.
- 32. When complete, click Submit.

Add Payment Elections (Direct Deposit information) task:

33. Click on Add Payment Elections.

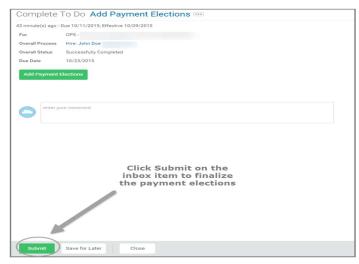


- **34. Payment Type** will default to Direct Deposit. Florida Atlantic University uses direct deposit as the method of salary payments for employees.
- **35.**Select the **Account Type** (Checking or Savings).
- **36.**Enter your **Bank Name, Routing Number,** and **Account Number** for direct deposit.
- 37.Click Ok.

New employees

onboarding process. Elect how to receive payment for the selected types of pay. If selecting direct deposit, also set u John Doe (WD0001305) Default Country United States of America Default Currency USD Payment Type * × Direct Deposit := information) task: Use for Pay Type 🛛 Expense Rule Regular Payments Account Setup required. Worker John Doe Sample Check DATE MPI DO NOT INCLUDE 43. Click Submit. 1123456789: 0001234567890 - 00423 9 Digit Routing # Account # Include all zeros Account Information Account Nickname (optional) Enter your Account Type * 🔿 Checking direct Savings deposit Bank Name * Bank Name banking information Routing Transit Number * 123456789 Account Number 1 * 98765432100 Cancel

- **38.** After adding the banking information, a review page will appear. If entered correctly, click Done.
- 39. At the inbox, the To Do: Add Payment Elections will still appear. After adding the banking information, click Submit to finalize the payment elections.



40. After completing the initial onboarding steps, refresh the inbox. Three additional tasks will

need to be completed to finish the online

Complete Federal Withholding Elections (W-4

- 41. Complete the information on the W-4 as
- **42.** When finished, click the **I Agree** checkbox.

<form> Marcine State <t< th=""><th>cond(s) ago - Due 10/11/2</th><th>015; Eff</th><th>ctive 10/09/2015</th><th></th></t<></form>	cond(s) ago - Due 10/11/2	015; Eff	ctive 10/09/2015					
non complete the W-4 as required. Complete the W-4 as require	Company	Florid	Atlantic University					
best by the base of the base	Effective Date	10/09	2015					
MANING Manufactoria Manufactoria Manufactoria	Name	John	loe	Complete the W-4 as required				
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Vince listed kolonic Noncoder		Whet?	er you are entitled to claim a certain	n number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a c				
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LEGAL NOTICE Your Name and Pass-most est considered as your "Destroate Signature" and will save as your continuous of the accuracy of the information term of a source and complexe. Destroate passing of parity your accuracy that is an examined this certificate and to the bit of the your however and an advected term of the source of the information term of the source of the information term of the source of the information term of the information tere of the information term of the			* This year I expect a refund of all :	federal income tax withheld because I expect to have no tax liability.				
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LAgee The form is not rold and balance is signalize LAgee Check the I Agree box and Submit when complete			2. You understand that your payrol	Il tax withholding election is a legal and binding transaction.				
Check the I Agree box and Submit when complete								
when complete	I Agree							
·								
and second				when complete				
			Cancel					

Review Documents task:

- 44. Review the documents in this task by clicking on the title of the document.
- 45. After reviewing each document, check the I Agree box acknowledging receipt of the document and that you have read the information.

New employees

Review Docur	nents Review Documents for Onboarding for	Jim Dean	
1 minute(s) ago - Effect Documents Document Instructions Signature Statement	two 60/192015 403(b) Plan Universal Availability Notce Please take some time to familiarce yourself with the 403(b) Plan Universal Availability Notce I acknowledge receil of the 403(b) Plan Universal Availability Notce.	Click on the title of the form to review the document	e contact Benefits a
I Agree Document Link	Vhen comp	lete, check the I ree box	
Instructions Signature Statement	Please take some time to formatize yourself with the Workers' Compens- I acknowledge for thave read the Workers' Compensation New Claim R		s, please contact E
	Compliance with Florida Statute 119.01 (State Policy On Public Records) read the document and complete the form, sign it and upload the signed do	Review all of th documents	
Comment	:	File	

46. There are three documents that you will need to review, print, complete the information and upload the signed document.

The Loyalty Oath will need to be signed in front of a notary.

47. When all of the documents have been reviewed, boxes checked, and documents uploaded, click Submit.

Complete I-9 Form task:

- **48.** Verify that the information is correct on the electronic I-9. Add any missing information or make corrections, if needed.
- **49.**Click on the appropriate checkbox for Employment Eligibility.

	nt Eligibility Verification						
Department of	Homeland Security, U.S. Citizenship	and Immigration Servic	eo				
START HERE	Download and read the Form I-9 and	d its instructions before	completing this form.	Form H9 Instructions		the information on the I-9 is correct. Add missi	ng
The instruction	is must be available during completio	on of this form.			informati	ion or make corrections,	if
t is illegal to di	INATION NOTICE: iscriminate against work-authorized i hire an individual because the docum					needed.	
Section 1. E	Employee Information and A	Attestation					
Employees mu	st complete and sign Section 1 of Fo	im I-9 no later than the	first day of employment,	but not before accepting a job offer.			
Last Name 🔹	Doe	First Name 🖈	John	Middle Initial		Other Names Used (if any)	
Address ★ 1;	234 ABC Wey	Apt. Number		City or Town 🛨	Boca Raton	State * PL	Zip Code ★
	01/01/1980 Social Social s		23-45-6789 low attestation, and attest	Email Address	johndoe@gmail.com	Telephone Number	
By checking on	e of the boxes below, I acknowledge n of the United States	that I have read the bel				Telephone Number	
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- **50.**Review the information on the electronic I-9. If you agree, click on the **I Agree** checkbox.
- 51. If someone is preparing and/or translating the I-9 for you, click on "A preparer(s) and/or translator(s) assisted the employee in completing Section 1" under **Preparer and/or Translator Certification** and complete the appropriate information under **Signature of Preparer or Translator**.

For aliens authorized to work, provide ye	our Alien Registration Number/USCIS Number O	R Form I-94 Admission Number:
1. Alien Registration Number/USCIS Nu	mber	
	OR	
2. Form I-94 Admission Number:		
If you obtained your admission number t	from CBP in connection with your arrival in the Ur	nited 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 imprisonmen	at and/or fines for false statements or use of false documents in
I Agree \star 🗹		
Preparer and/or Translator C	ertification	
To be completed and signed if Section 1	is prepared by a person other than the employe	e.
Last Name	First Name	
Address	CIN	State
I attest, under penalty of perjury, that I ha	ave asisted in the completion of this form and the	at to the best of my knowledge the information is true and corr
I Agree		paring and/or translating , enter this information
enter your comment		
Process History		
Complete Form I-9- Awaiting Action		
Jim Dean - Dee 0	6/21/2015	
Submit Save for Later	Cancel	

52. When finished, click Submit and refresh inbox.

To Do: Present Documents to Human Resources Department:

53.A new task will appear after submitting the electronic I-9.

54. The To Do: Present Documents to Human

Resources Department is notifying you that on your first day of employment (no later than within 3 days of start date), you must bring original, unexpired I-9 identification to Human Resources.

This is a federal law.

For a list of acceptable identification, see: <u>https://www.uscis.gov/system/files_force/files/form/</u> <u>i-9-paper-version.pdf?...1</u>.

NOTE: This link provides a copy of the <u>Lists of</u> <u>Acceptable Documents</u> and a paper version of the <u>Form I-9</u>. DO NOT complete the paper <u>Form</u> <u>I-9</u>.

55. After reading the notification, you must click **Submit** in order to finalize the onboarding process in *Workday*.

FAU ACCOUNT INFORMATION

56. The onboarding process is now complete.

At this point, Workday will generate your FAU account. A confirmation message from Workday will be sent to your email, notifying you that your FAU account is ready to be claimed. Follow the directions to enable your account.

FIRST DAY OF EMPLOYMENT

57.Bring original, unexpired I-9 identification to Human Resources.

NOTE: If you reside out of the area, please contact <u>hres@fau.edu</u> for instructions.

If you are a student and you reside out of the area, please contact stuemp@fau.edu for instructions.

58. When this step has been completed, your hiring manager will receive a notification, letting them know you are now eligible to begin work.