

Onboarding

New employees

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.

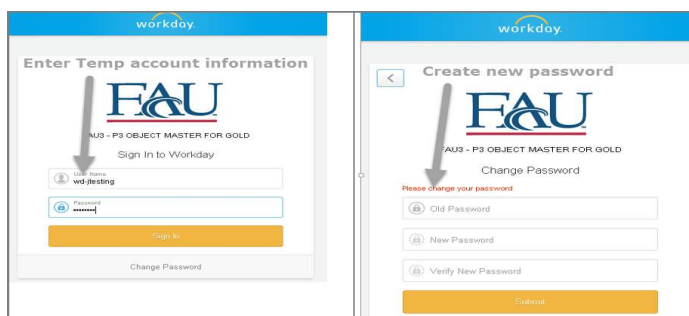
The employee will receive an email from workday@fau.edu with a URL address for Workday (where onboarding will take place), a temporary user name and a series of steps to be completed. A temporary password will be sent in a separate email.

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 hres@fau.edu (for non-student employees), stuemp@fau.edu (for student employees) or call 561-297-6156.

ONBOARDING OVERVIEW

1. 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 non-responsive account. Do not send emails to it.
2. 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

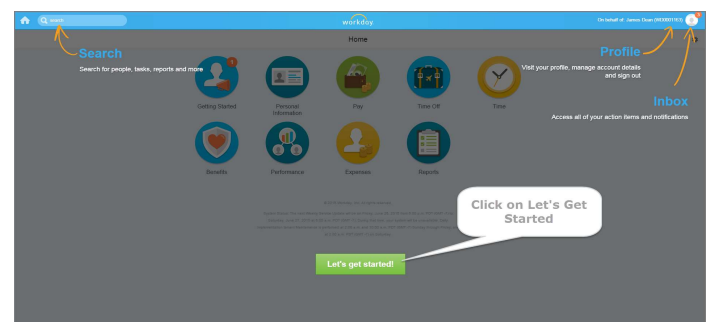
least 1 number, and a symbol (Ex. !, %, \$, ?, etc.).

3. 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.
5. 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

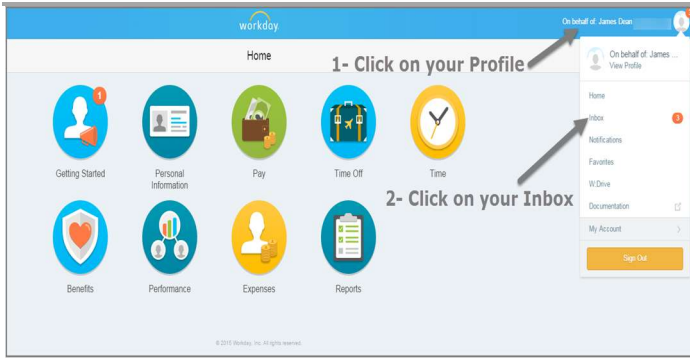
6. The first time you log into Workday, the system will default to a Welcome screen. Click on Let's Get Started:



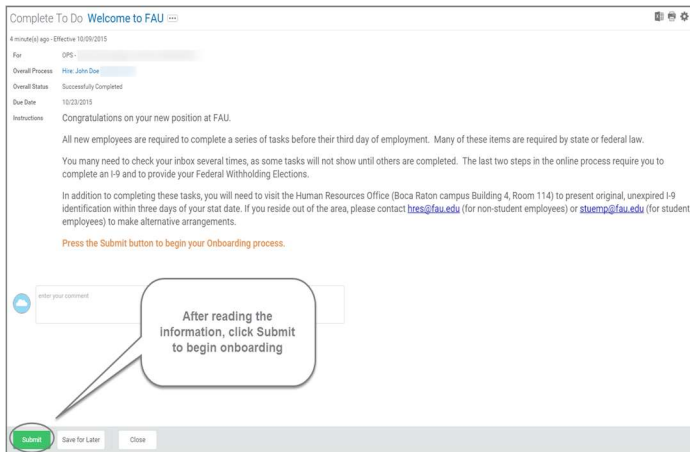
7. Click on your **Profile**, then click on your **Inbox**.

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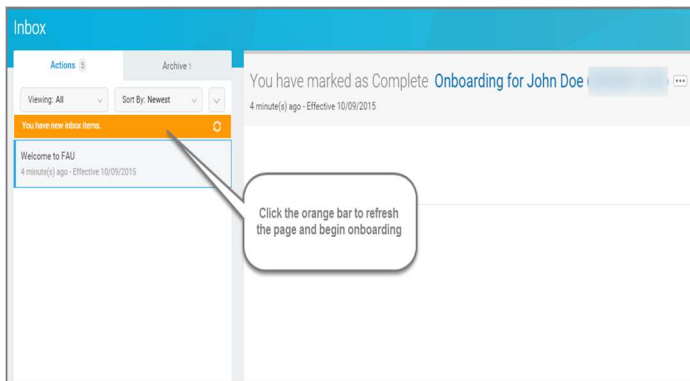
New employees



8. 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.

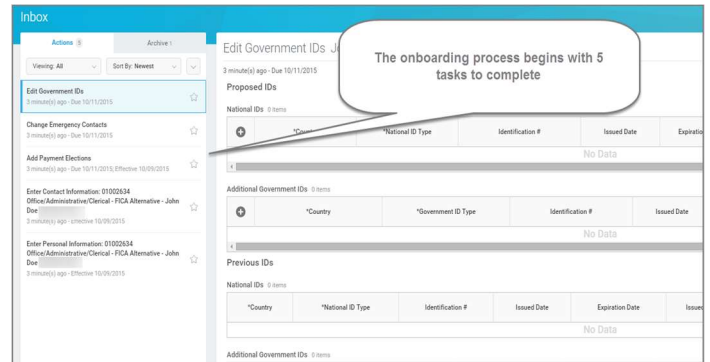


An orange bar will appear in the inbox, notifying you of new inbox items. Click the bar to refresh the page.



9. 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.

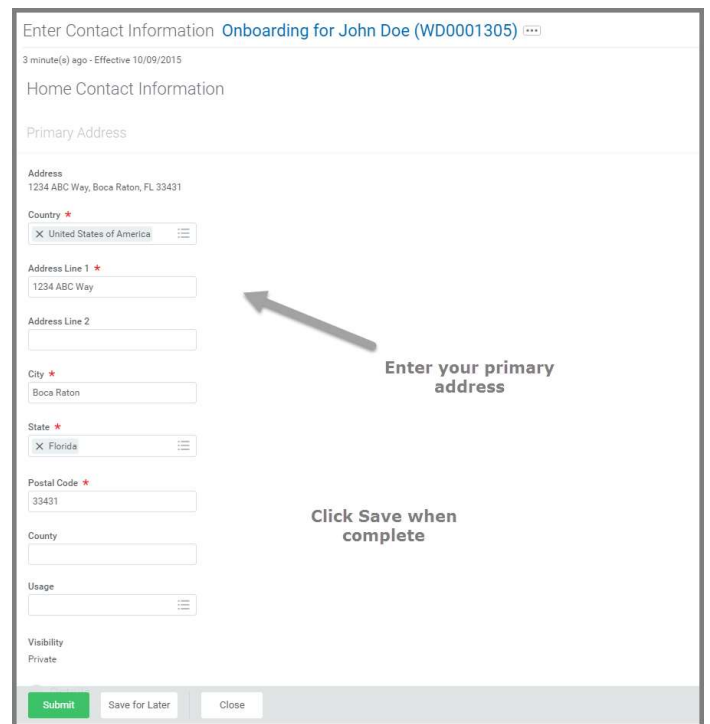


NOTE: The tasks may not be in the order listed on this job aid.

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.



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- 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.

- 14. Enter any **Additional Phone** numbers, if applicable.
- 15. 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**.
- 18. Use the Prompt icon (ⓘ) under **Country** to search for **United States of America**

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

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

- 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 **Legal Name**, if it differs from what appears. Click **Done** when complete.
- 25. If you have a **Preferred Name** that you would like listed, click on the Edit icon (✎), add the preferred name and click ✓ when complete.

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.

Primary Emergency Contact

Legal Name

Name
Jane Doe

Country *
United States of America

Prefix

First Name *
Jane

Middle Name

Last Name *
Doe

Suffix

Save Cancel

Enter the name of the contact and click Save

Select the appropriate relationship in the following field

Enter at least one contact information

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**.

Complete To Do **Add Payment Elections** ...

3 minute(s) ago - Due 10/11/2015; Effective 10/09/2015

For OPS - [redacted]

Overall Process Hire: John Doe

Overall Status Successfully Completed

Due Date 10/23/2015

Add Payment Elections

enter your comment

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**.

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 onboarding process.

Complete Federal Withholding Elections (W-4 information) task:

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

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.

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**.

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**.

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.

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:
https://www.uscis.gov/system/files_force/files/form/i-9-paper-version.pdf?...1.

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

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 hres@fau.edu 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.