

# Onboarding

## 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.

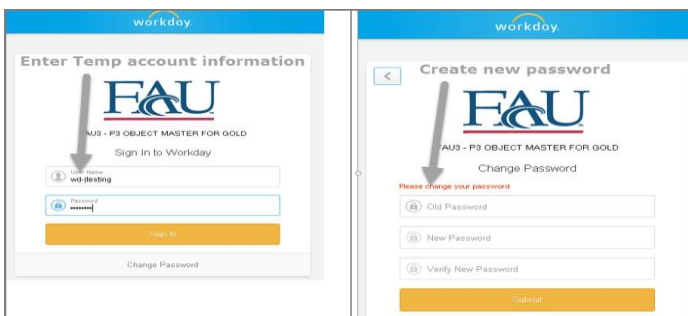
The employee will receive an email from [workday@fau.edu](mailto:workday@fau.edu) with a URL address for Workday (where onboarding will take place), a temporary user name and a series of steps to be completed. A temporary password will be sent in a separate email.

## 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](mailto:hres@fau.edu) (for non-student employees), [stuemp@fau.edu](mailto: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](mailto: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

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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. At the top-right corner of your homepage, click on the middle icon to view your **Inbox**.

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

Enter Contact Information task:

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

Home Contact Information

Primary Address

Address  
1234 ABC Way, Boca Raton, FL 33431

Country  
United States of America

Address Line 1  
1234 ABC Way

Address Line 2

City  
Boca Raton

State  
FL Florida

Postal Code  
33431

County

11. Enter an **Additional Address**, if applicable
12. Click **Add** under **Primary Phone**. Select the **Phone Device**, then enter the **Phone Number** (area code included). Click ✓ when complete.

Primary Phone

Phone  
+1 561 291 3000 (Mobile)

Phone Device  
Mobile

Country Phone Code  
United States of America (US)

Phone Number  
561 291 3000

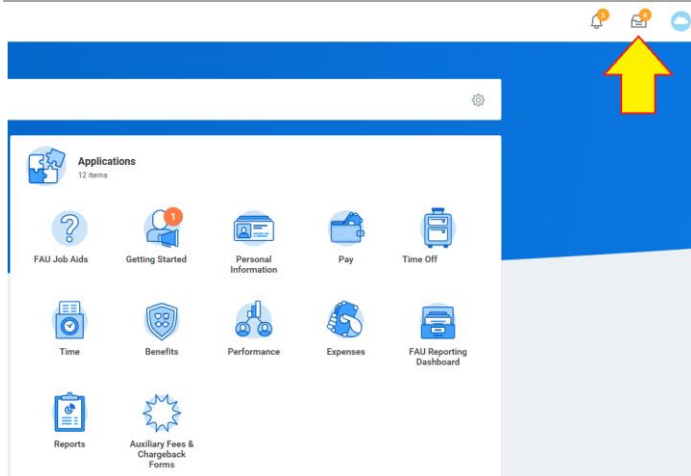
Phone Extension

Details

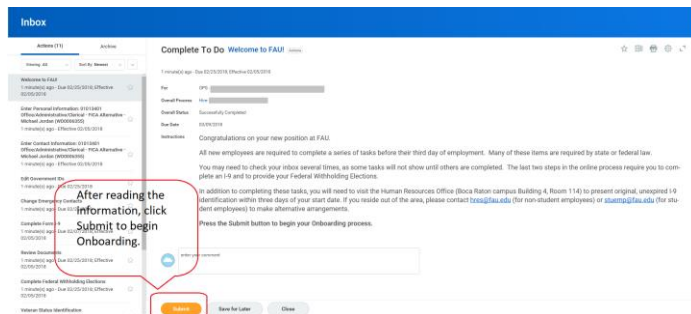
13. Enter any **Additional Phone** numbers, if applicable.
14. Verify the correct **Email Address** is listed, edit if needed.
15. Click **Submit**.

Edit Government ID's:

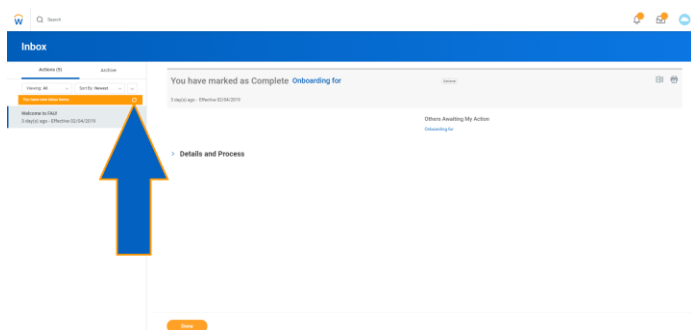
**NOTE: This action requires a social security number to be entered. If you do not have a**



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. A list of action items can be found within the *Actions* tab. These actions will need to be submit in order to complete onboarding.



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



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social security number, email **Benefits & Retirement** ([benefits@fau.edu](mailto:benefits@fau.edu)) and **Workforce Administration & Records Control** ([hres@fau.edu](mailto:hres@fau.edu)).

16. Click the Plus (+) button under **National IDs**.

17. Use the Prompt icon (ⓘ) under **Country** to search for **United States of America**

Only select United States of America. Contact HR if you do not have a SSN#

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

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

Social Security Number (SSN)

U.S. Individual Taxpayer Identification Number (ITIN)

19. Enter your SSN in the **Identification #** field.

20. Leave the **Issue Date** and **Expiration Date** fields blank.

21. Click **Submit**.

*Enter Personal Information task:*

22. **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.**

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23. Click on the Edit icon (✎) to update your **Legal Name**, if it differs from what appears. Click **Done** when complete.

24. If you have a **Preferred Name** that you would like listed, click on the Edit icon (✎), uncheck the "Use Legal Name as Preferred Name" box and enter the preferred name. Click ✓ when complete.

Only select United States of America. Contact HR if you do not have a SSN#

25. 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**
- **Place of Birth**
- **Marital Status**
- **Race/Ethnicity**
- **Citizenship Status**
- **Nationality**
- **Relative's Names**, if applicable
- **Disability**, if applicable
- **Military Service**, if applicable

**NOTE: In the event you receive an error message when submitting, please click on the error message and follow its instructions to submit successfully.**

26. Click **Submit** when complete.

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## Change Emergency Contacts task:

27. To enter the **Legal Name** for an emergency contact click on the Edit icon (✎), enter the First Name and Last Name, then click ✓.
28. 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 (first)

Country ▼ United States of America

Prefix

First Name

Middle Name

Last Name

Suffix

Relationship ▼ Relationship

**Add** ✎ ✓

29. Enter at least one contact information for the emergency contact by clicking on **Add** and entering the appropriate information.

**Primary Phone** is recommended.

30. **Alternate Emergency Contacts** may be entered by clicking on **Add** and entering the appropriate information.

31. When complete, click **Submit**.

## Add Payment Elections (Direct Deposit information) task:

32. If you would like to receive your pay via direct deposit, click on **Add Payment Elections**. Otherwise, you may click Submit to proceed with Onboarding.

## Complete To Do Add Payment Elections Actions

1 minute(s) ago - Due 02/25/2018; Effective 02/05/2018

For OPS ▼

Overall Process Hire ▼

Overall Status Successfully Completed

Due Date 03/09/2018

**Add Payment Elections**

☁ enter your comment

**Submit**

Save for Later

Close

## Add Payment Elections (Direct Deposit information ONLY) task:

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

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## Payment Election Option

Select how to receive payment for each type of pay. For direct deposit, be sure to add bank accounts before payment elections. You can add additional accounts later.

Worker [redacted]  
Default Country United States of America  
Default Currency USD

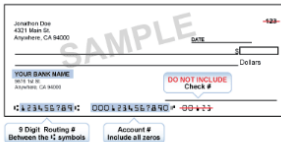
### Preferred Payment Method

Expense Rule \* ☒ Direct Deposit

### Account Information

Account Holder Name [redacted]

Sample Check



### Account Information

Account Nickname (optional) [text box]  
Account Type \* ☒ Checking ☐ Savings  
Bank Name \* [text box]  
Routing Transit Number \* [text box]  
Account Number \* [text box]



- 37.** After adding the banking information, a review page will appear. If entered correctly, return to your inbox.



- 38.** At the inbox, the To Do: Add Payment Elections will still appear. After adding the banking information, click **Submit** to finalize the payment elections.

## Complete To Do Add Payment Elections

1 minute(s) ago - Due 02/25/2018, Effective 02/05/2018

For OPS- [redacted]  
Overall Process Hire [redacted]  
Overall Status Successfully Completed  
Due Date 03/09/2018

[Add Payment Elections](#)

enter your comment [text box]

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

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

Complete Federal Withholding Elections

6 second(s) ago - Due 10/11/2015, Effective 10/09/2015

Company Florida Atlantic University  
Effective Date 10/09/2015  
Name John Doe  
Social Security Number [redacted]  
Address [redacted]

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy.

W-4 Data

[View Blank Form](#)

Nonresident Alien ☐

Last Name Differs from SS ☐

Marital Status \* ☐ Single ☐ Married

Number of Allowances 0

Additional Amount 0.00

Exempt ☐

LEGAL NOTICE

I Agree ☒

[Submit](#) [Save for Later](#) [Cancel](#)

Check the I Agree box and Submit when complete

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## Veteran Status Identification:

42. Click on the prompt under "Select a veteran status" to select the appropriate veteran status. When finished, click Submit.

## Review Documents task:

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

45. When all of the documents have been reviewed and boxes checked, click **Submit**.

## 3 Additional Forms:

46. Complete three Onboarding forms ([State Policy on Public Records](#), [Florida Retirement System Certification](#), and [Loyalty Oath](#)) by accessing the related link provided within the action item.

**NOTE: An activated FAUNet ID is required in order to log into FREVVO. Please be advised to check your email to confirm that you have receive instructions to activate your FAUNet ID. If not, contact the Office of Information Technology (OIT) Help Desk at (561) 297-3999 for troubleshooting.**

47. When finished, return to your inbox in Workday and click Submit on the 3 Additional Forms action.

## 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.

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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**.

**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 business 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](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**.

## COMPLETION OF ONBOARDING

**56.** Below are all of the action items that should have been submitted to finalize the completion of Onboarding. Refresh your inbox within Workday to confirm that there are no awaiting actions. If your inbox remains empty, then the onboarding process is now complete.

Step
To Do: Welcome to FAU!
Edit Government IDs
Change Emergency Contacts
To Do: Add Payment Elections
Enter Contact Information
Enter Personal Information
Review Documents
Complete Federal Withholding Elections
Complete Form I-9
To Do: Present I-9 Documents to Human Resources Department
To Do: 3 Remaining Onboarding Forms
Veteran Status Identification

## FIRST DAY OF EMPLOYMENT

Department of Human Resources

02/26/19



Your screens and processes may vary from those described here.



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

**NOTE:** If you reside out of the area, please contact [hres@fau.edu](mailto:hres@fau.edu) for instructions.

If you are a student and you reside out of the area, please contact [stuemp@fau.edu](mailto: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.