

Workday Onboarding Tasks for Employees

This job aid provides information and links to step-by-step instructions on how to complete employee onboarding tasks in Workday. Contact your manager for specific agency onboarding tasks, such as computer, badge, access, etc.

Onboarding tasks covered in this job aid include:

- Signing on to your Workday worker account for the first time
- Welcome Letter & Statewide Policy Review
- Agency Policy Review (where applicable)
- Form I-9 Completion
- Direct Deposit Agreement
- Direct Deposit Questionnaire
- Payment Election Enrollment
- Federal Withholding
- State Withholding
- Emergency Contacts Identification
- Onboarding Questionnaire
- Update My Talent Profile

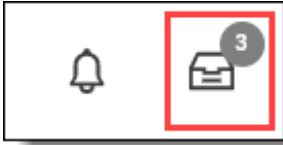
This document contains links to Workday knowledge article that will provide step-by-step instructions to complete the tasks. Please refer to these resources for assistance with these tasks.

Reach out to your supervisory for tasks not covered in this job aid, such as but not limited to: computer, badge, access, etc.

External candidates applying for jobs through Workday are required to set up an External Workday Account using a personal email address. When a candidate is hired, Workday sends two emails to the new employee's personal email address. These emails provide information needed to access Workday as an employee. The first email contains the Username which is the employee ID number (OR #). The second email contains a temporary password and link to Workday. These emails are generated from a Workday web address different from the recruitment correspondences. At times, these emails may appear in the employee's junk folder. Employees should check their junk folders before contacting their agency team for assistance. [Agency contact information](#).

To allow future use of Workday from your personal device, use this job aid to set up multifactor authentication. [Workday Multifactor Authentication](#)


Step 1: Once into the system, you will have actions to complete in your Workday My Tasks page. Click on the inbox icon in the upper right-hand corner of the screen.



Complete each task. See details on next page.

<p>Welcome Letter & Statewide Policy Review: Custodian - SR10 - Non Exempt</p> <p>Effective: 03/04/2024 Updated: 02/22/2024</p>	02/22/2024 ☆
<p>Agency Policy Review: Custodian - SR10 - Non Exempt</p> <p>Effective: 03/04/2024</p>	02/22/2024 ☆
<p>Complete Form I-9</p> <p>Effective: 03/04/2024</p>	02/22/2024 ☆

Documents

Document  Onboarding Welcome 2024-05-07.pdf

Signature Statement I hereby acknowledge I have read the Welcome letter.

I Agree

Document Link Discrimination and Harassment Free Workplace Number: 50.010.01

Signature Statement I hereby acknowledge I have read and understand the Discrimination and Harassment Free Workplace 50-010-01. I understand this record will become part of my official personnel file.

I Agree

Welcome Letter and State Policy Review – Click on the link to review each document. Click each **I Agree** box and **Submit**. Tip: You can click *Save for Later* and come back to the task if you aren't able to review all the documents at once.

Agency Policy Review – Click on the link to review each document. Click each **I Agree** box and **Submit**. Tip: You can click *Save for Later* and come back to the task if you aren't able to review all the documents at once.

Note: Not all agencies will have a policy review task.

Complete Form I-9 - 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. All fields with a red asterisk are required. Click **Submit**.

Note: Employees do not receive a Form I-9 task until Payroll has assigned a work schedule. If you do not have the Form I-9 task, immediately notify your supervisor, Workforce Liaison or HR contact. [Agency contact information](#)

Step 2: Once the I-9 form is completed by HR and the Welcome Letter and Policy Reviews are submitted, the employee will receive the following tasks:

Direct Deposit Agreement: Custodian - SR10 - Non Exempt Effective: 03/04/2024	03/04/2024	☆
Direct Deposit Questionnaire: Custodian - SR10 - Non Exempt Effective: 03/04/2024	03/04/2024	☆
Payment Election Enrollment Event	03/04/2024	☆


View this knowledge article for step-by-step instructions [Payment Election \(Direct Deposit\)](#). You must be signed into Workday to view this knowledge article.

Direct Deposit Agreement – Click on the link to review the agreement, then check the **I Agree** box and click **Submit**.

Direct Deposit Questionnaire – Complete the questionnaire and click **Submit**.

Payment Elections Enrollment Event – Select your **Preferred Payment Method (Check or Direct Deposit)**. Enter Account Information if selecting Direct Deposit. Click **OK**. Manage Payment Elections screen comes up next. Add additional accounts or update if needed. Click **Submit**.

Step 3: Up next will be a task to complete Federal Withholding. See this knowledge article for step-by-step instructions. [Entering and Updating Withholding Elections \(W-4\)](#) You must be signed into Workday to view this knowledge article.




Do not complete these next steps prior to your first working day.

Complete Federal Withholding Elections Effective: 03/04/2024	03/04/2024	☆
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Complete Federal Withholding Elections – Complete the form, click **I Agree** and **Submit**.

Step 4: Up next will be a task to complete State Withholding. View this knowledge article for step-by-step instructions [Entering and Updating Withholding Elections \(W-4\)](#). You must be signed into Workday to view this knowledge article.

	<p>If you live and work outside of Oregon, work with your agency HR Partner to complete the remote work agreement and verify your alternate work location is entered prior to completing this task. This task may not be required.</p>
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Complete State and Local Withholding Elections 03/04/2024 ☆

Effective: 03/04/2024

Complete State and Local Withholding Elections – Select your **State and Withholding Form Type** and click **OK**. Enter your **W-4 Data**, review the legal notice and click the **I Agree** checkbox, then click **Submit**.

Step 5: Up next will be a task to enter your Emergency Contacts and a questionnaire. View this knowledge article for step-by-step instructions. [Personal Information view and update](#) You must be signed into Workday to view this knowledge article.

Change Emergency Contacts 03/04/2024 ☆

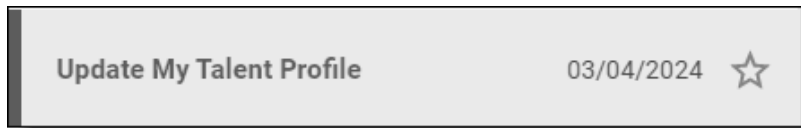
Onboarding Questionnaire: Custodian - SR10 - Non Exempt 03/04/2024 ☆

Effective: 03/04/2024

Change Emergency Contacts – Enter emergency contact information and click **Submit**. View this knowledge article for step-by-step instructions [Personal Information view and update](#). You must be signed into Workday to view this knowledge article.

Onboarding Questionnaire – Complete the questionnaire and click **Submit**.

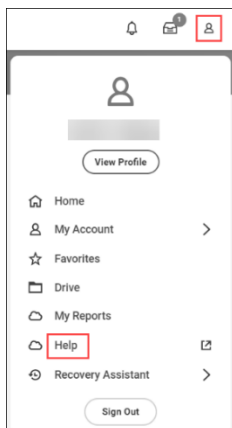
Step 6: Up next is a task to update your Talent Profile.



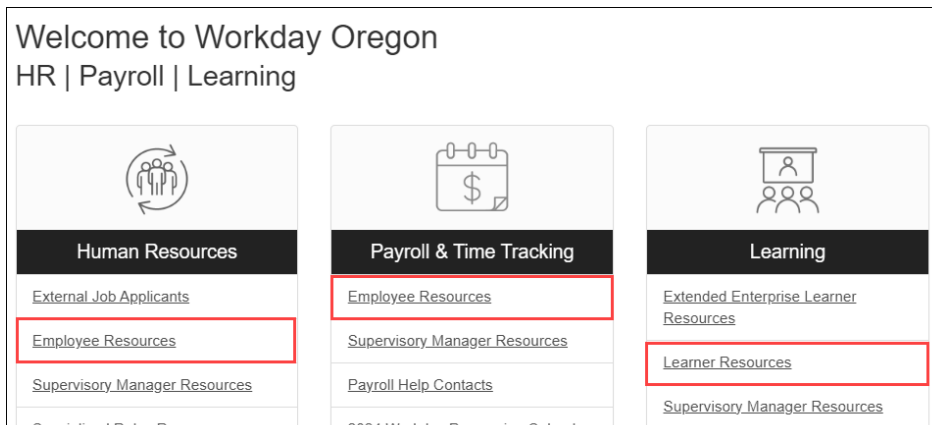
Update My Talent Review - This is your opportunity to let the State of Oregon know of your qualifications and interests. Providing this information is voluntary. Click on **Go To Guided Editor** for a step-by-step guide or **Go to Summary Editor** to edit everything on one page. Update fields as appropriate. Items with a red asterisk are required fields. Click **Submit** when complete. Tip: If you do not wish to update your talent profile, you can click on the gear icon (sprocket) in the upper right-hand corner of the task and select Cancel from the drop-down menu. Enter a comment and click **Submit**.

Additional Information

Other helpful resources can be found by clicking on your **profile icon** in the upper right-hand corner of the screen and selecting **Help** from the menu. A new tab will open, and you will be directed to the Workday Instructions on the Workday Oregon webpage. Link is [here](#).

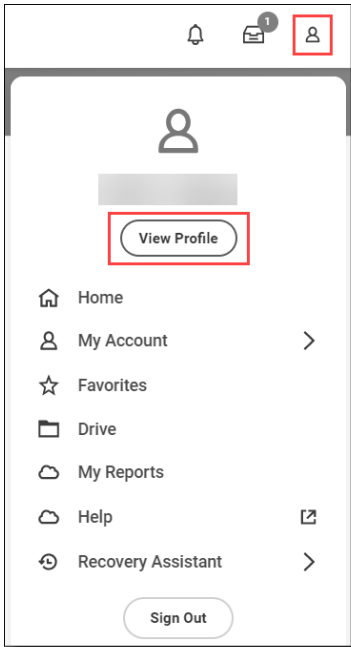


Resources for specific areas can be viewed by clicking on the Employee or Learner resource tab for the resource you need.



Who to Contact

Your agency support contacts can be found by clicking on your **profile icon** in the upper right-hand corner of the screen and selecting **View Profile** from the menu.



You will be directed to your Workday profile page. Click on **Contact** in the left navigation panel (A) and then click on **Support Roles** (B). Click on the *worker name hyperlink* to be directed to their profile page when you can view their phone number and email address.

