

### WHO GETS ONBOARDING TASKS?

Onboarding tasks are completed by the following workers in Workday:

- Hires/Rehires
- Newly contracted contingent workers (**Note:** Contingent workers receive a limited list of Onboarding tasks).

Workers who have had a Change Job event (e.g., transfers, promotions, demotions, reassignments, etc.) will not have to complete Onboarding tasks.

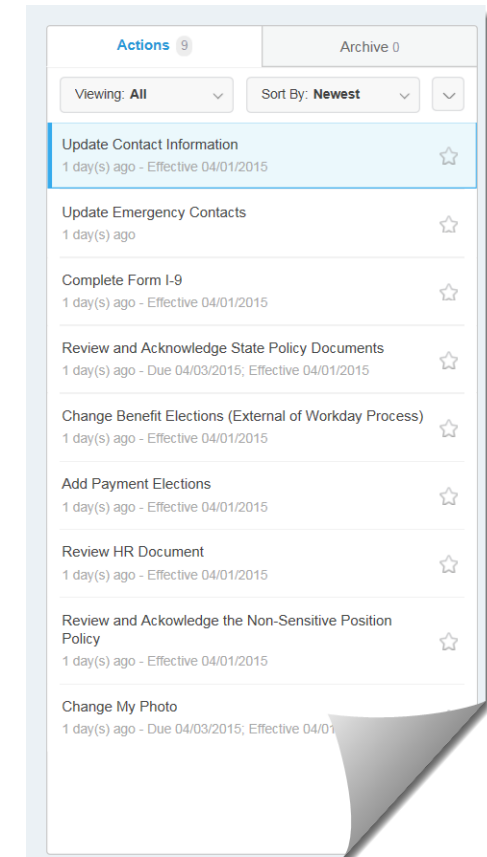
### ONBOARDING ACTION ITEMS

The SPS Workday Onboarding action items are listed below. These tasks display in the worker's inbox when Onboarding is triggered (after the worker's account is created). Tasks marked with an asterisk (\*) indicate contingent worker Onboarding tasks.

**Note:** Onboarding tasks are available to workers once the Hire is complete, even if it is prior to their first day at work.

- **Update Contact Information\***: Allows worker to change address, birthdate, gender, and other information.
- **Update Emergency Contacts\***: Allows worker to add emergency contact information.
- **Change My Photo\***: Allows worker to add a photo that will be sent to HR Coordinator to review.
- **Complete I-9 Form**: Allows worker to complete the electronic I-9 form (if applicable). HR Coordinator can review the I-9 form electronically. Agency does not have to utilize the Federal e-verify program to use this form.
- **Review and Acknowledge State Policy Documents**: Worker reads State policies and acknowledges that they have been read. The State policy documents that are reviewed in this task include the following:
  - State Ethics Law
  - Standards of Conduct
  - Software Code of Ethics
  - Substance Abuse Policy
  - Smoking Policy
  - Sexual Harassment Policy
  - Domestic Violence in the Workplace Policy
  - Code of Fair Employment Practices
- **Change Benefit Elections**: Worker accesses a link to the DBM Benefit home page to download Benefit enrollment forms.
- **Add Payment Elections**: Worker accesses a link to the Payroll Online Service Center (POSC) where you can access the Direct Deposit and Tax Withholdings forms.
- **Review HR Document**: Worker fills out the Education Verification form.
- **Review and Acknowledge the Non-Sensitive/Sensitive Position Policy**: Depending on the position, worker reads and acknowledges the non-sensitive or the sensitive position policy.
- **Review Bargaining Unit Document**: New Employee Service Fee letter needs to be reviewed by employee if the Position is in a Bargaining Unit.

*Example of Onboarding tasks in an employee's inbox.*



## VIEW THE STATUS OF ONBOARDING

To view the status of Onboarding for an individual worker...

1. Search for the employee and then go to the **Job** tab > **Worker History** sub-tab on the worker profile.
2. Find the Onboarding event for the employee. Click on the event and view the **Process** tab to see steps Completed and In Progress.

View Worker History by Category

**Note:** You can also click the button to view by category. The Onboarding event will be in the **Personal Data** category.

To view the status for your Agency...

1. Use the Search field to find the **Onboarding Status Summary** report.
2. Review the report.

**Notes:**

- This report allows HR staff to view of the Onboarding status by Supervisory Organization.
- It includes a summary of workers with Onboarding “In Progress” or “Completed” and the total number of workers that have been assigned Onboarding tasks (an example is shown below).
- The report is actionable -- you can click links to see report detail. For example, click the link in the **In Progress**, **Completed**, or **Total** column to view the employees whose Onboarding tasks by Worker name.

| Onboarding Status Summary |             |           |           |
|---------------------------|-------------|-----------|-----------|
| Supervisory Organization  | In Progress | Completed | Total     |
| SPS Training Unit F17     | 7           | 0         | 7         |
| <b>Total</b>              | <b>27</b>   | <b>1</b>  | <b>28</b> |

## VIEW POLICIES THAT AN EMPLOYEE HAS REVIEWED AND OTHER DOCUMENTS

To view worker documents or electronic acknowledgments...

1. Search for the employee and then go to the **Personal** tab > **Documents** sub-tab on the worker profile (shown below).

Christina Aguilera (W0000000) Corr Officer

218725 Corr Officer II | Hagerstown - 18419 Roxbury Rd | James Bond (W888899) Manager

Job | Contact | **Personal** | Compensation | Benefits

Personal Information | IDs | **Documents** | Personal Notes | Names

Add

1 items

| Worker Document | Document Category | Attachments |             |                        | Edit | Delete |
|-----------------|-------------------|-------------|-------------|------------------------|------|--------|
|                 |                   | File Name   | File Length | Upload Date            |      |        |
| MS-27.pdf       | Salary Exception  | MS-27.pdf   | 52          | 07/07/2015 04:43:35 PM |      |        |

Reviewed Documents

Standard Documents 8 items

| Document         | Effective Date | Document Attachment  | Signature Type | Worker                                     | Signature Date         | Signature Statement   |
|------------------|----------------|----------------------|----------------|--|------------------------|---|
| State Ethics Law | 01/01/1900     | State Ethics Law.pdf | acknowledgment | Christina Aguilera (Terminated) (W2004131) | 07/07/2015 01:55:10 PM | I hereby acknowledge that I have received and understand document regarding the Public Ethics Law, and I agree to abide by the provisions summarized in the document. I understand that this is a general |

OR

2. Search for the employee and then use the Related Actions and Preview icon next to the employee’s name to go to **Worker History > Maintain Worker Documents**.

**Note:** HR Staff can upload other Onboarding documents that are not part of the online Workday Onboarding process that may be specific to their Agency, if desired. Use the **Add** button on the the employee’s profile or the **Maintain Worker Documents** task.