Onboarding Tasks

Workday will automatically generate a series of onboarding tasks that go to the new hire's inbox. *Please note that some employees may see additional onboarding tasks based on their position type/job family.*

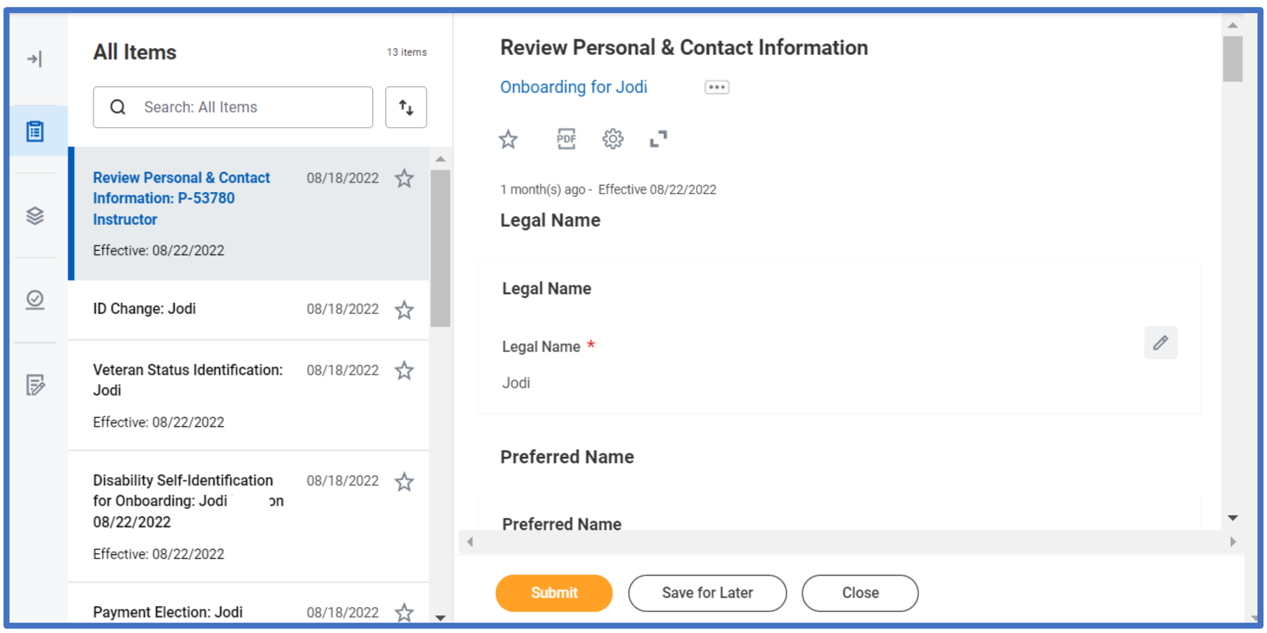
For example, some employees may be asked to sign agreements and other tasks. However, some of the basic required onboarding tasks for new hire employees will be the following:

Note: Some employees will also see a request to complete New Hire Training and register for the soonest available New Employee Orientation. Samples of those emails are in the last two pages of this guide.

1. Review Personal & Contact Information

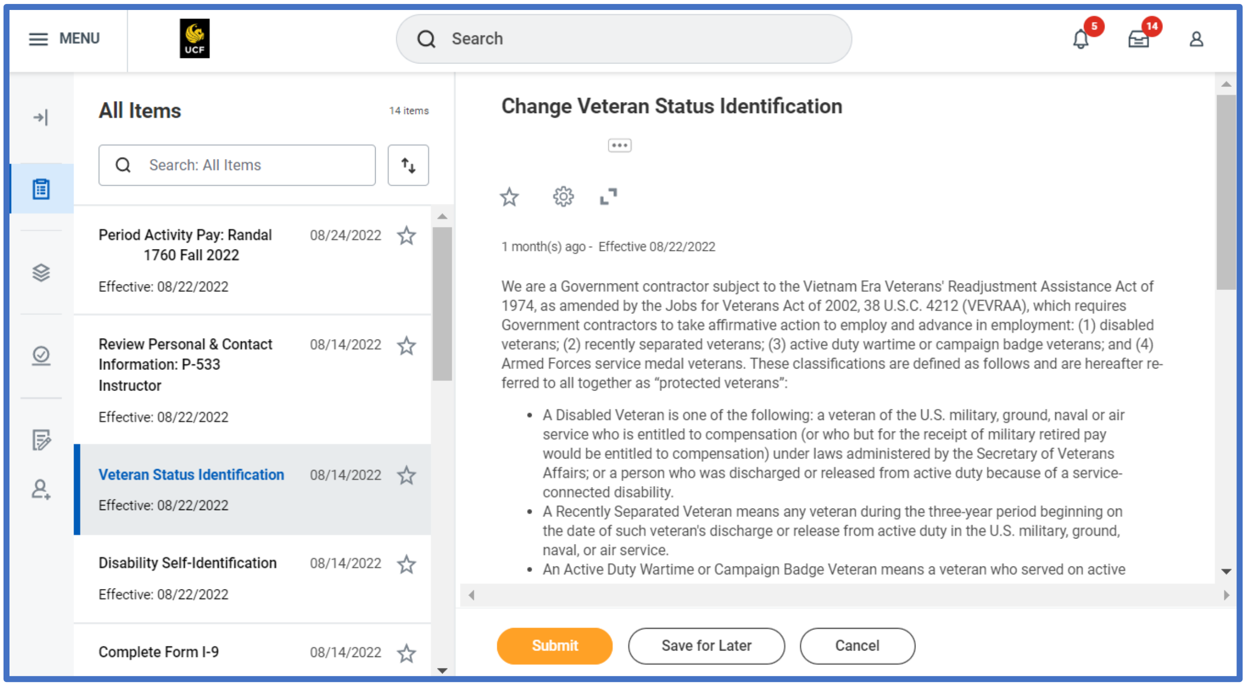
For this onboarding task the employee will review to make sure their biographical information is okay in the system and make any updates as needed.

A. They can enter legal name, preferred name, gender, date of birth, marital status, disability, home address, etc.
B. Once complete, they will click "Submit"
    a. If they have missed any required fields, Workday will give them an error message.

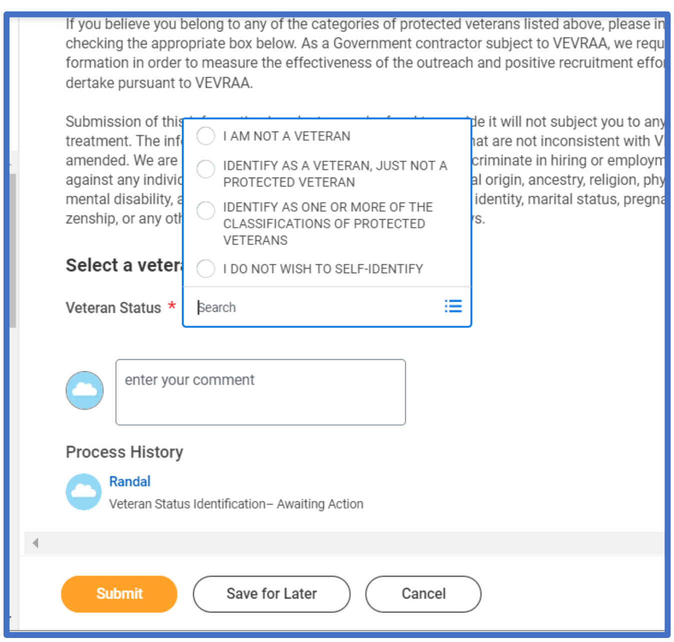


2. Veteran Status Identification

This task asks the employee to select a veteran status from the drop-down options.



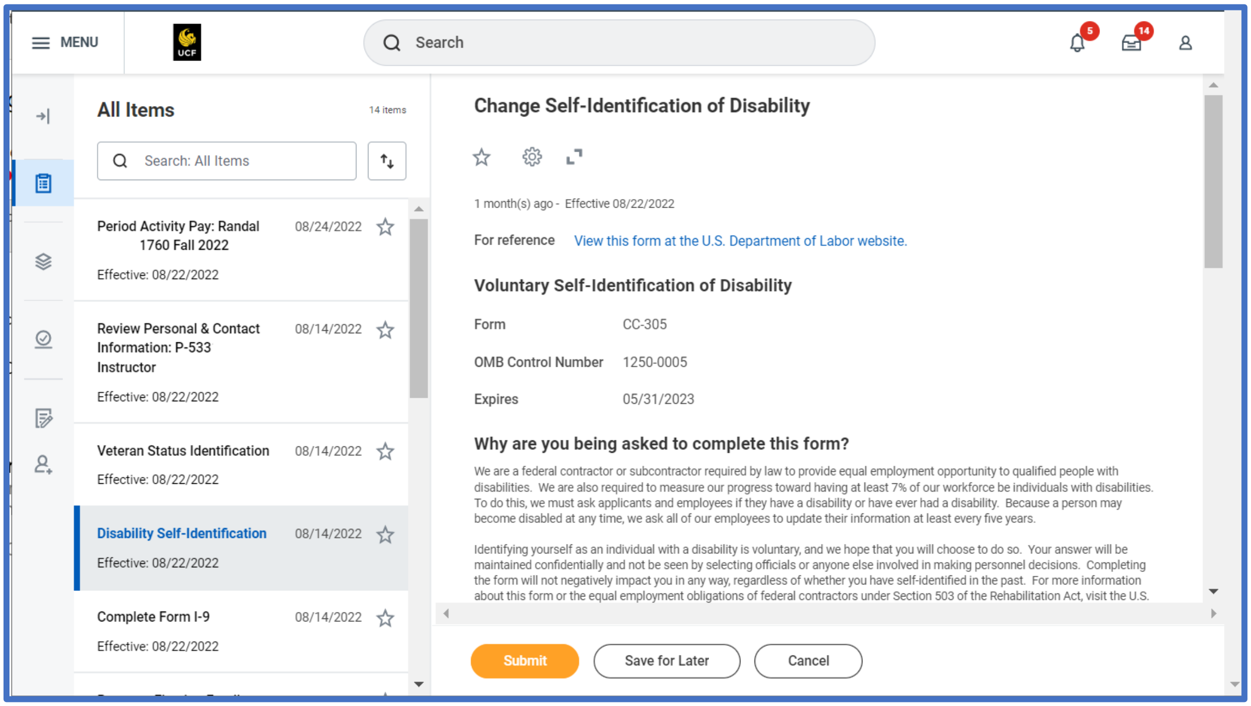
A. The employee will read the statement and then scroll to the bottom of the message to select a Veteran Status choice from the drop-down choices.
   a. Note: "I do not Wish to Self-Identify" is a possible response.



B. Then the employee will click "Submit"

3. Disability Self Identification

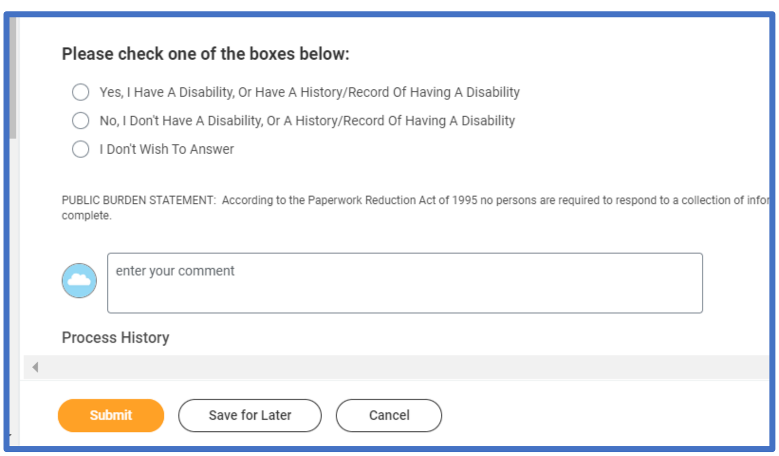
This task asks the employee to choose the appropriate response from a drop-down menu regarding self-identification of disabilities and a statement regarding why this question is being asked.



A. The employee will read the statement and then scroll to the bottom.

B. Then the employee will select one of the boxes.

a. Note: “I Do Not Wish to Answer” is a choice that the employee can select.



C. The employee will then click “Submit”.

4. Complete Form I-9

This onboarding task must be completed **on or before the employee's first day** of employment. There is an entire step-by-step guide of completing the I-9 form in the Workday Articles. If you search for Completing I-9 Form in the Workday search box, you will be able to find some helpful articles with screenshots.

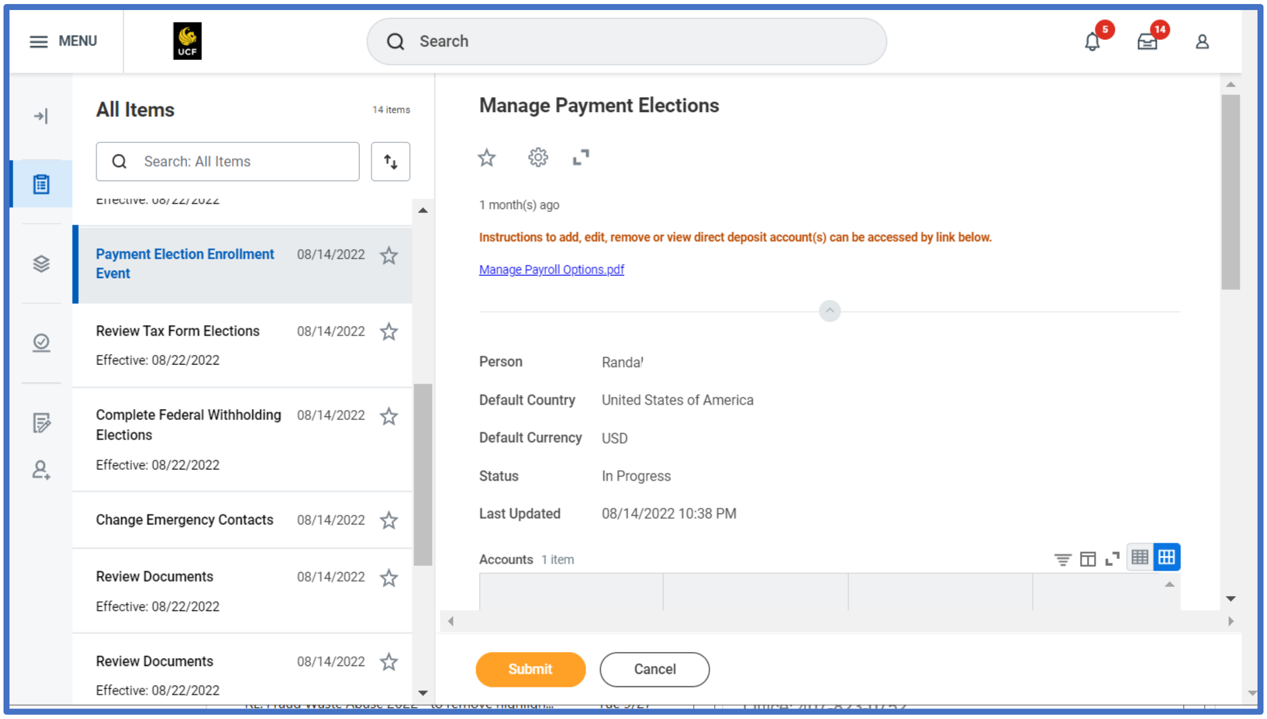
They are also linked below:

Completing Section 1 of the I-9 as a Domestic Employee :
https://impl.workday.com/ucf/d/inst/eb522d9850a61001526e7ac6fc9b0000/rel-task/2998$40834.htmld

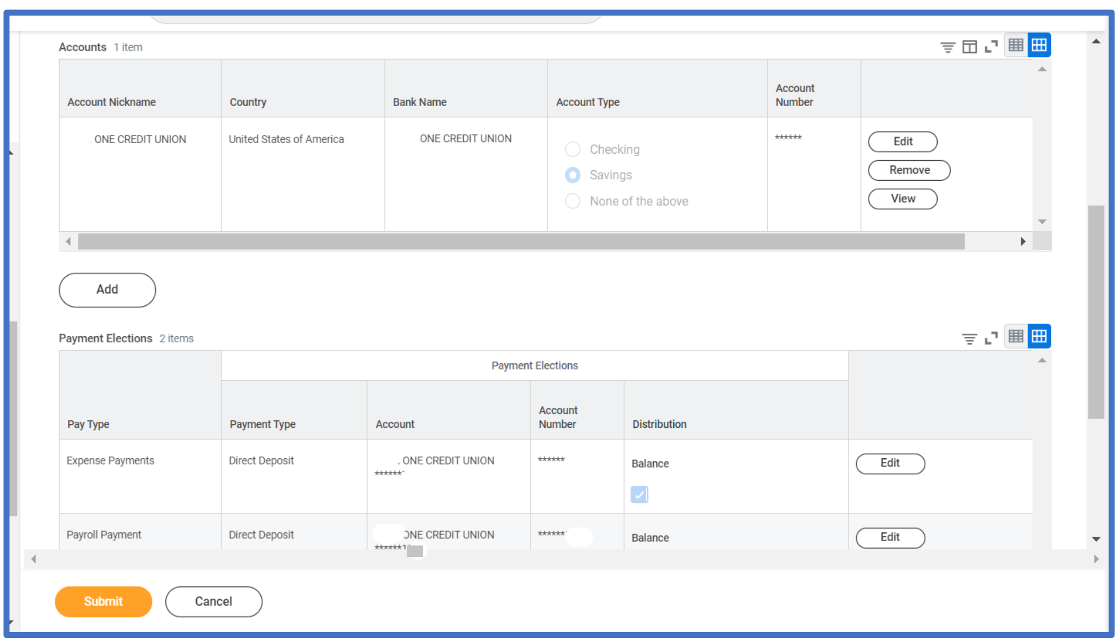
Completing Section 1 of the I-9 as an International Employee:
https://impl.workday.com/ucf/d/inst/eb522d9850a610015388666c70d10000/rel-task/2998$40834.htmld

5. Payment Election Enrollment

This task requires the employee to enter their direct deposit information so that they can get their paychecks deposited into their bank account. If the information is already in the system, then they just need to verify the information.



A. The employee will first click the "Add" button to enter their banking account information if it is not already displaying on the screen.

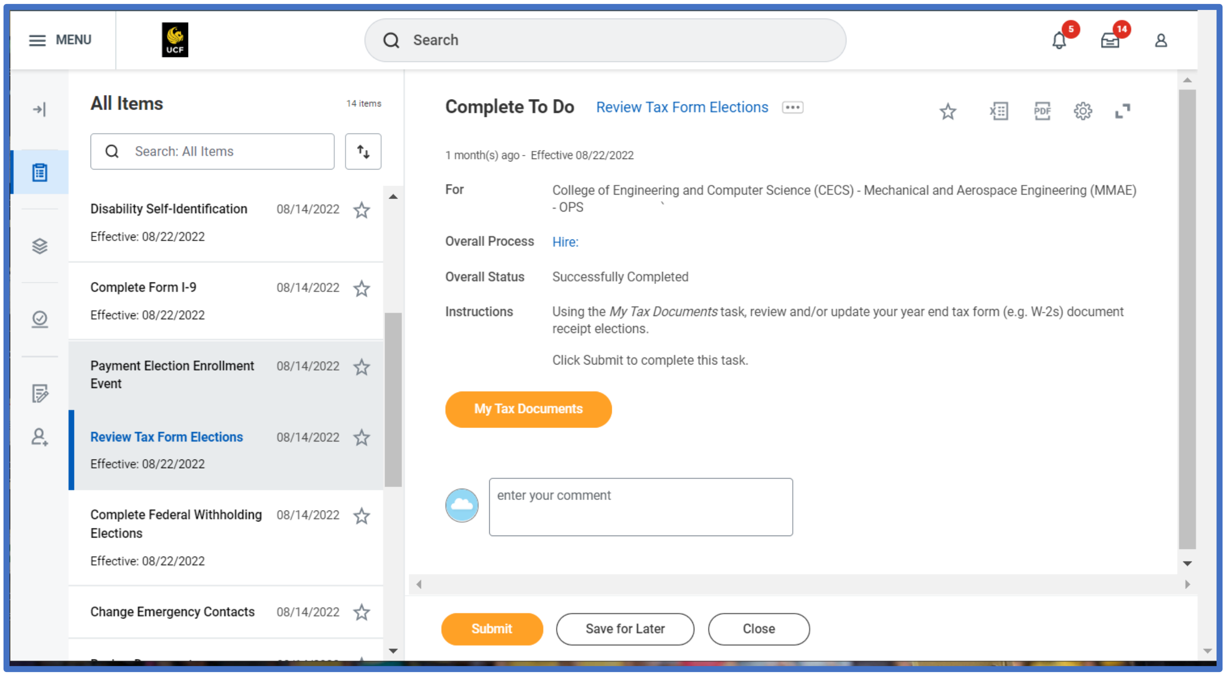


B. The employee will then enter the payment election associated with Expense and Payroll payments. If the employee entered multiple bank accounts in the "Accounts" section, this is the portion of the form where they can enter if they want the first $200 of their payroll to go to one account and the remainder to go to a different account.

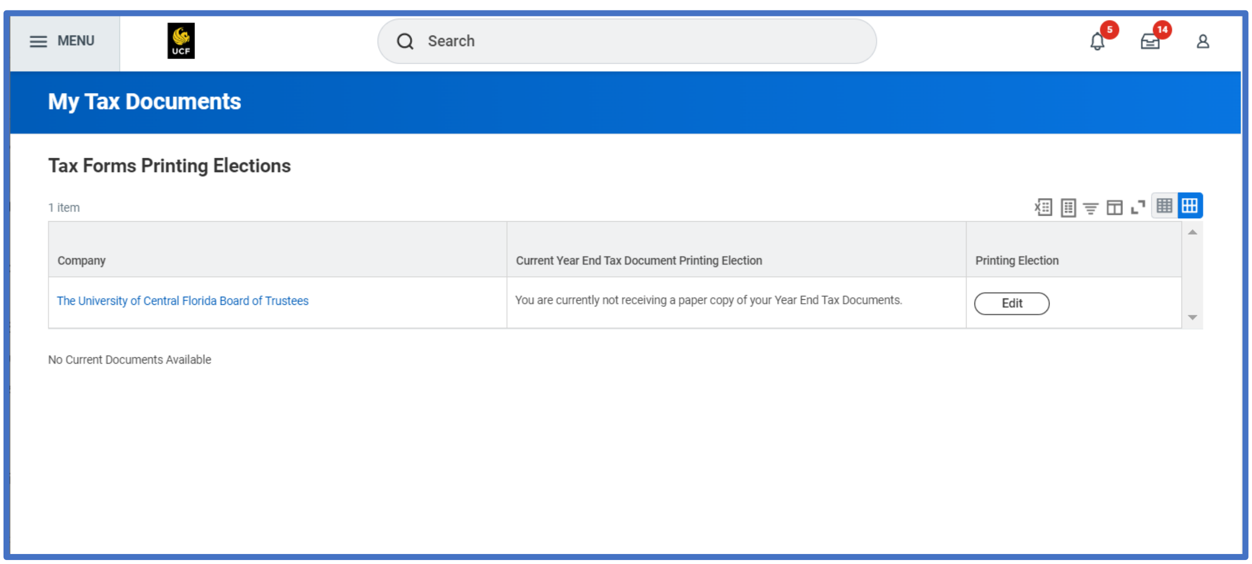
C. The employee will then click "Submit".

6. Review Tax Form Elections

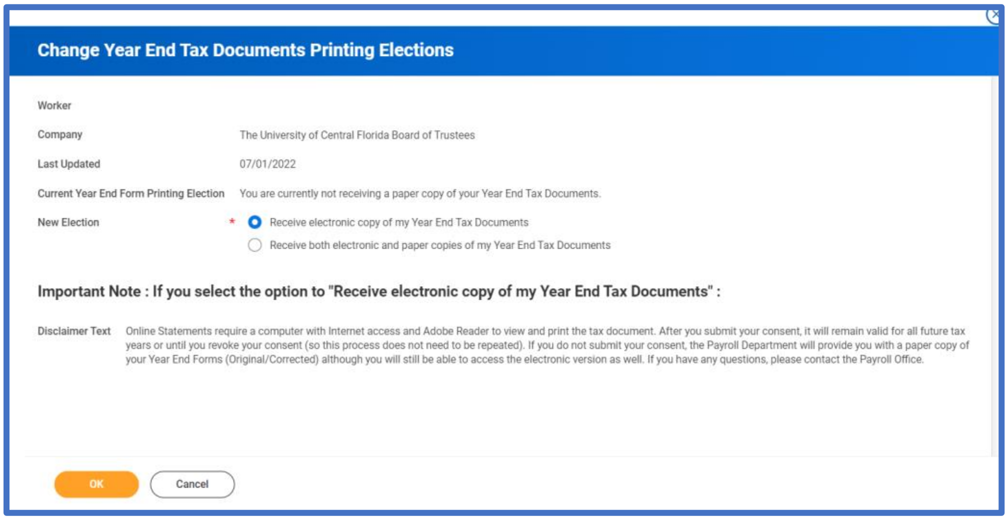
This task is a "To Do" step. The employee will identify whether they would like to receive a paper copy of year end tax forms or if they would like to receive it electronically.



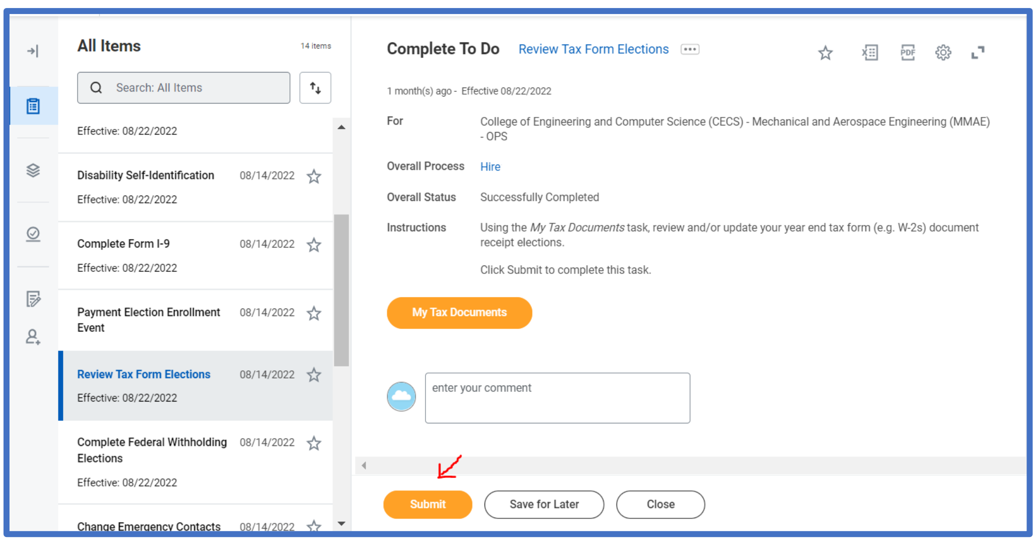
A. First the employee will click the orange button that says "My Tax Documents" to see the current election.
B. On the next screen they can see if they are currently receiving a paper copy and they can edit this selection to say if they want a print or paper by clicking "Edit"



C. The employee can make an election choice and then click OK.

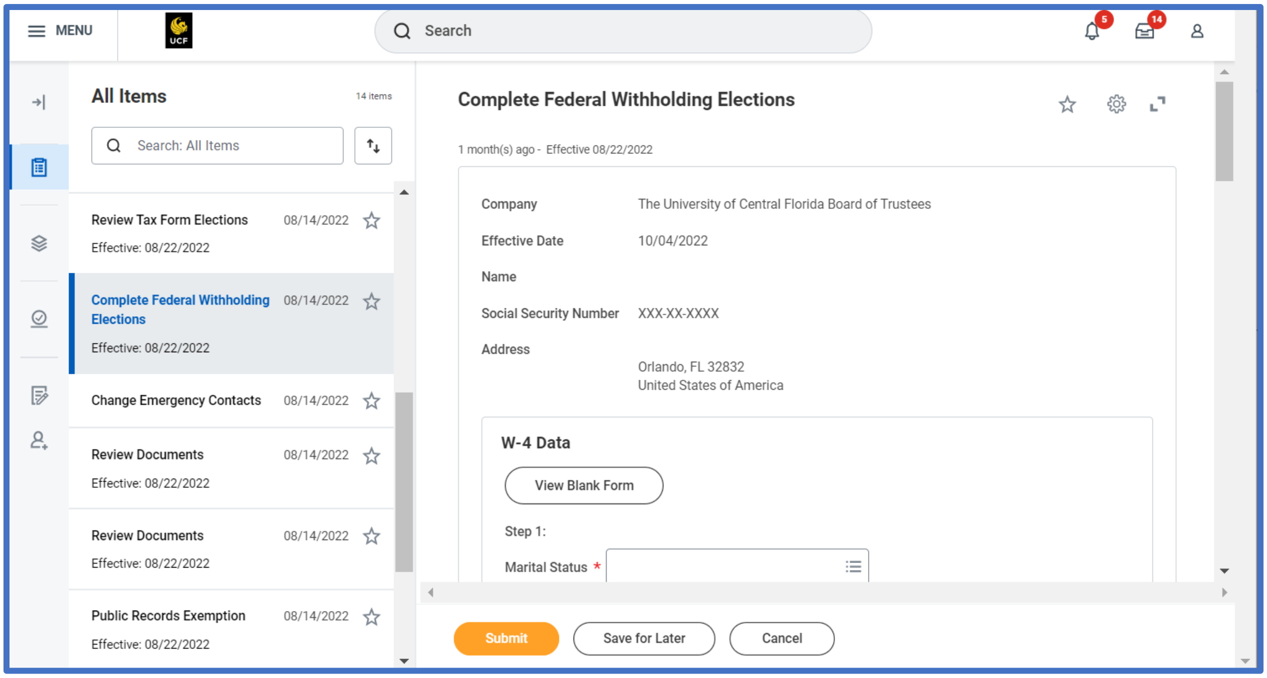


D. The employee will then click "Done"
E. The employee will then need to go back to their Workday Inbox to mark the task complete by clicking "Submit".
    a. A "To Do" step does require that after you do the Task that Workday has requested, you go back to mark it complete in your inbox.



7. Complete Federal Withholding Elections

For this onboarding task the employee will fill out their W-4 Federal Withholding Information.

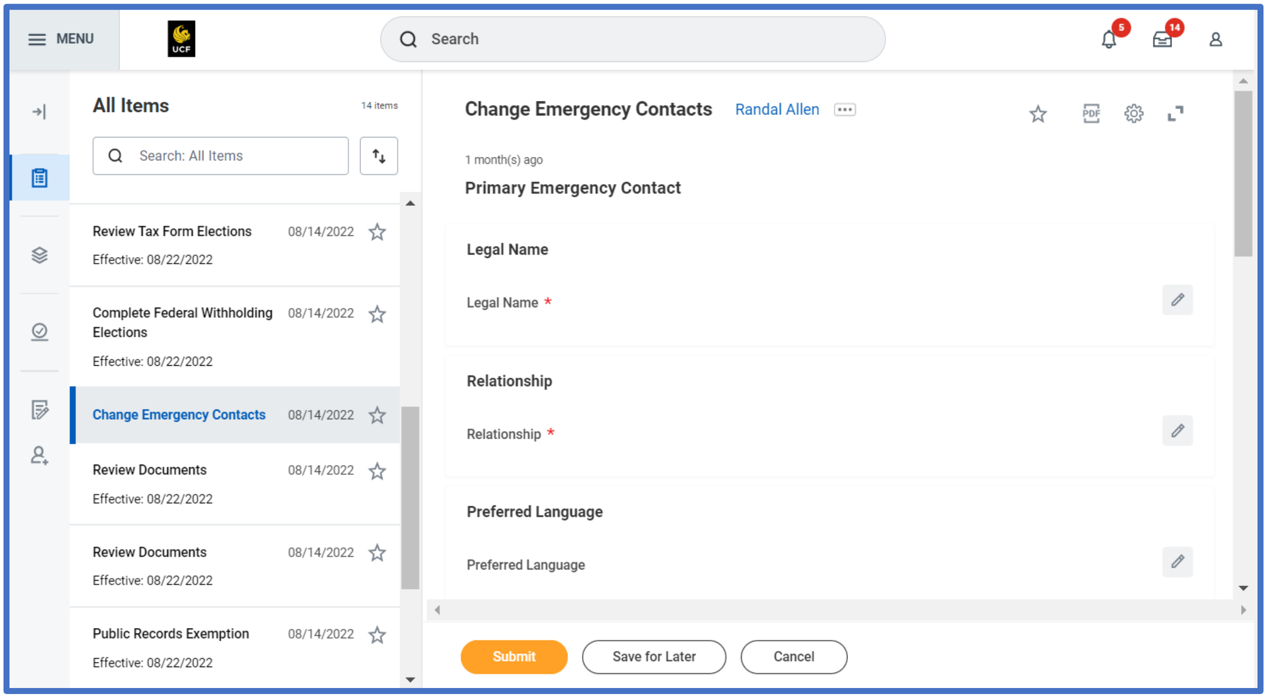


A. The employee will fill out the W-4 with their marital status, dependent information, etc.

B. After the employee has filled out the W-4, the employee can click “Submit”.

8. Change Emergency Contacts

This onboarding tasks requests that the employee enter an emergency contact.

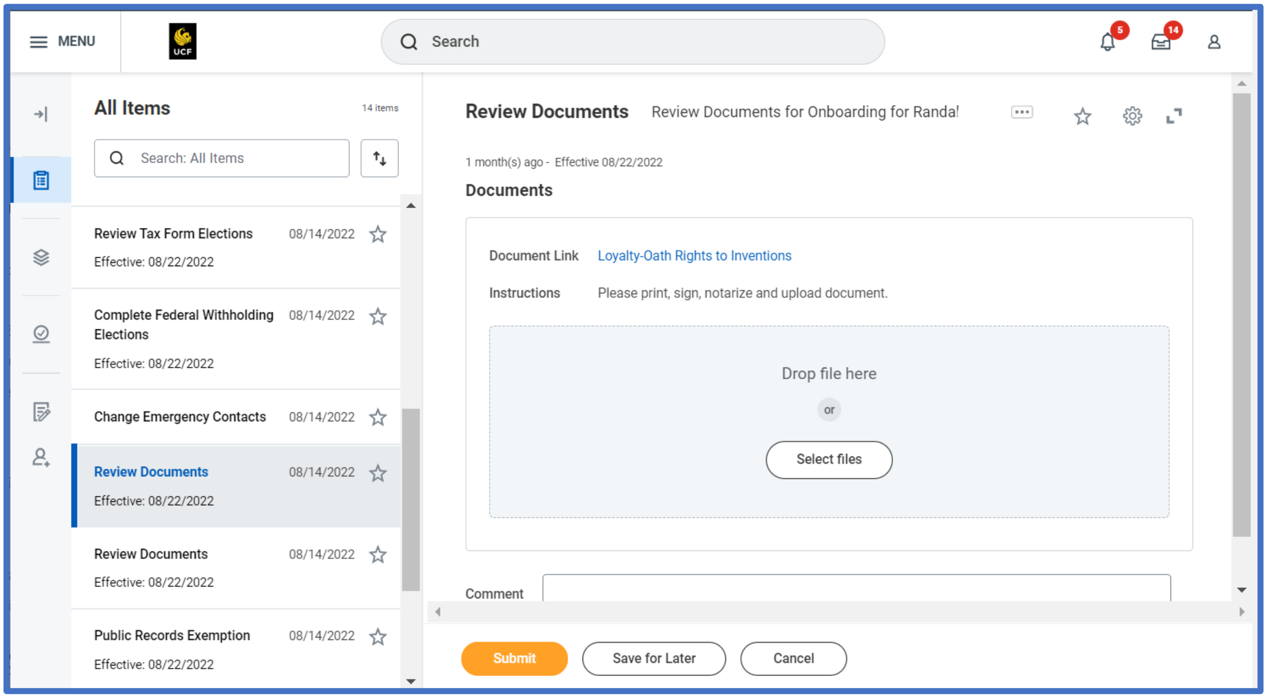


A. After the employee has entered the emergency contact information, the employee can click “Submit”.

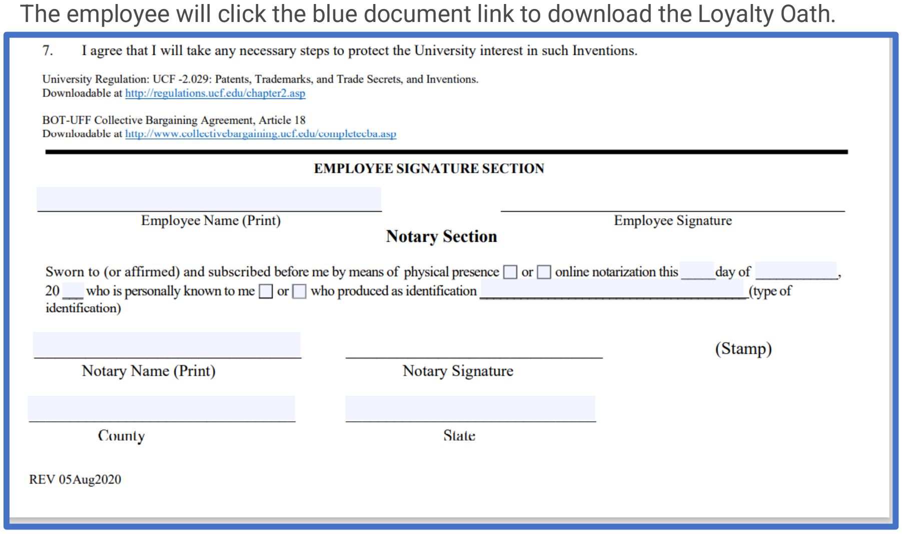
9. Review Documents

- Loyalty Oath

This review documents task requires that the employee complete the Loyalty Oath and get it notarized.



A. The employee will click the blue document link to download the Loyalty Oath.



7. I agree that I will take any necessary steps to protect the University interest in such Inventions.

University Regulation: UCF -2.029: Patents, Trademarks, and Trade Secrets, and Inventions.
Downloadable at http://regulations.ucf.edu/chapter2.asp

BOT-UFF Collective Bargaining Agreement, Article 18
Downloadable at http://www.collectivebargaining.ucf.edu/completecba.asp

EMPLOYEE SIGNATURE SECTION

Employee Name (Print) Employee Signature

Notary Section

Sworn to (or affirmed) and subscribed before me by means of physical presence ☐ or ☐ online notarization this ____day of __________, 20 ___ who is personally known to me ☐ or ☐ who produced as identification ______________________________(type of identification)

Notary Name (Print) Notary Signature (Stamp)

County State

REV 05Aug2020

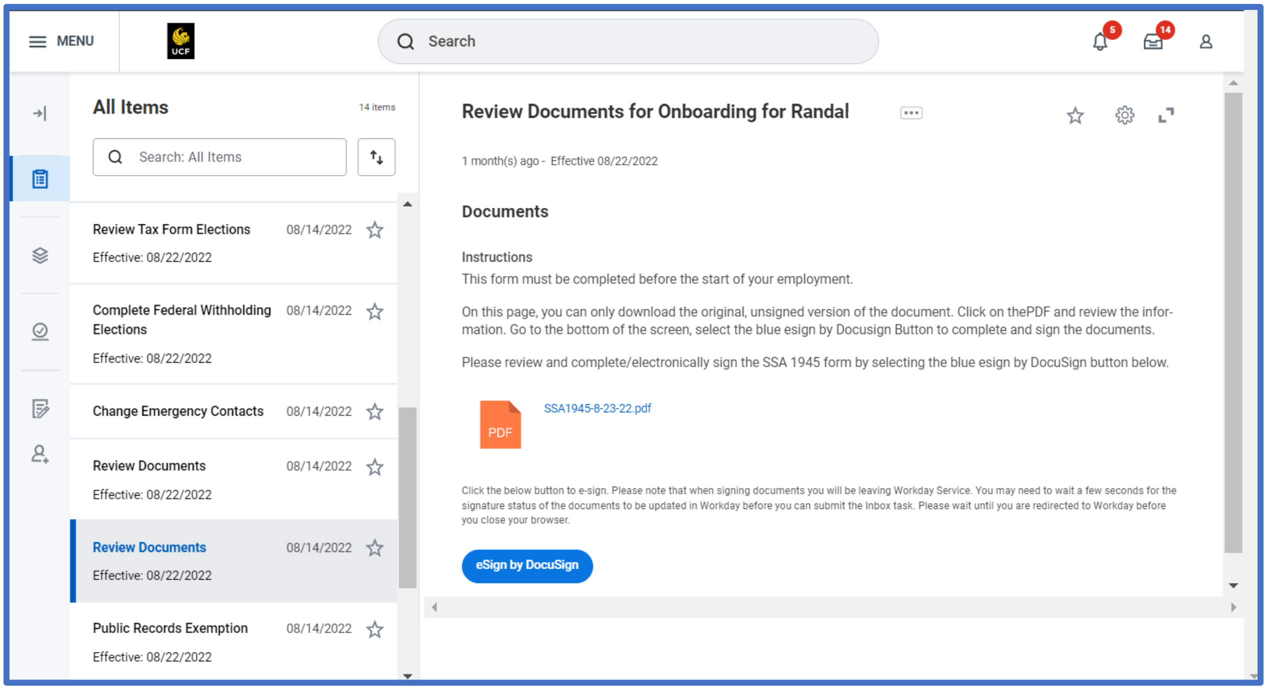
B. The form needs to be notarized and signed. After the form has been completely filled out the document will be dropped back into the Workday onboarding task so that it is added to their employee file in Workday.

C. The employee will then click “Submit”

10. Review Documents

– SSA 1945

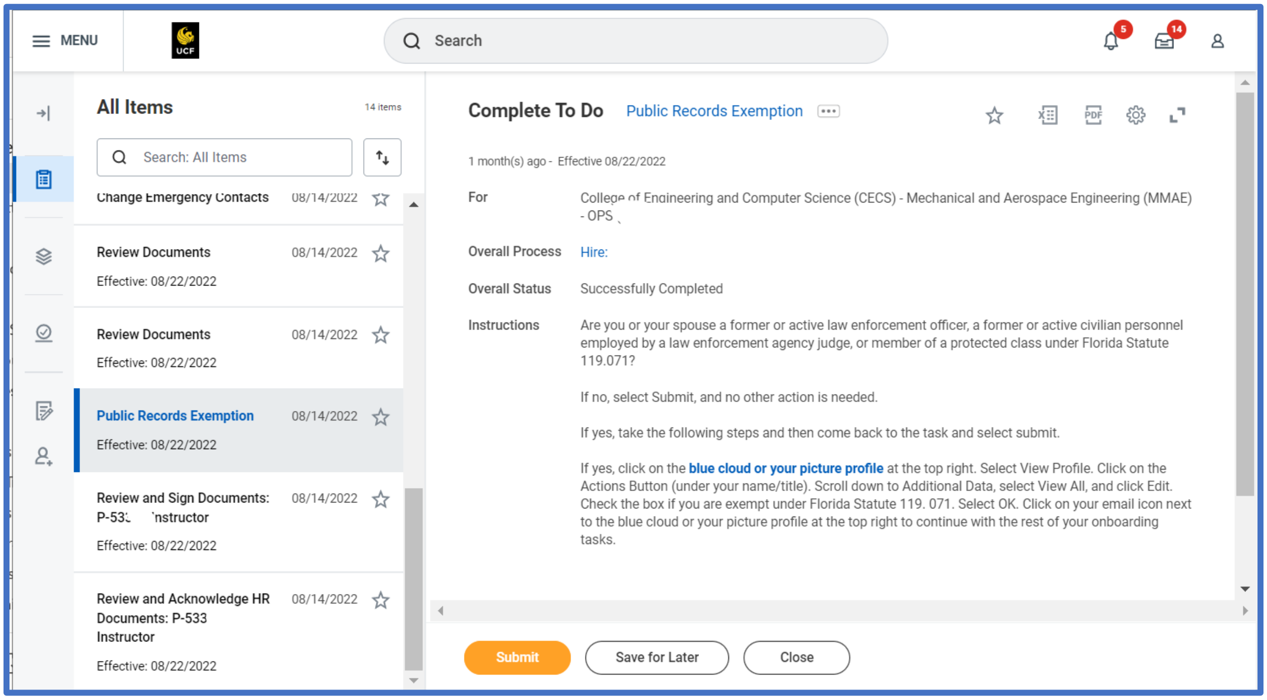
This task requires the employee sign the SSA-1945 form.



A. The employee will click the “eSign by DocuSign” blue button to sign the form using Docusign in Workday.
B. After the document has been signed, this task will be marked complete.

11. Public Records Exemption (Complete To Do Task)

This onboarding task asks employees to identify whether they or their spouse falls under one of the protected classes of Florida Statute 119.071.

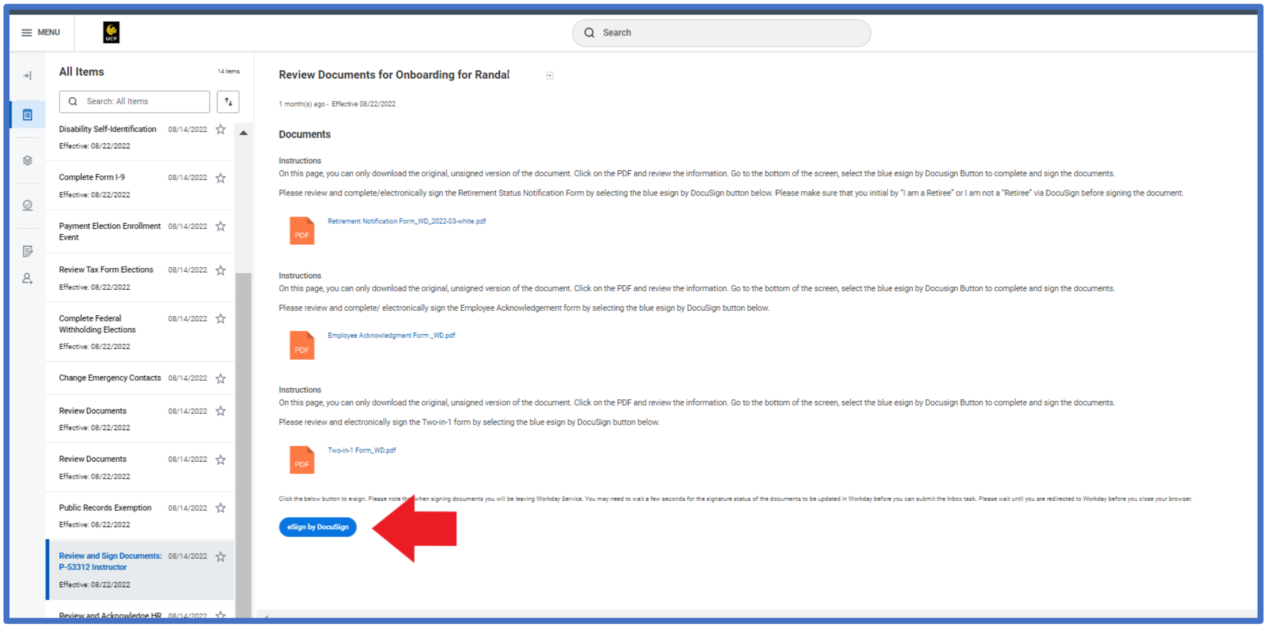


A. Most Common: If the employee **is not** a member of one of the protected classes, then they can simply click “Submit” and not further action is needed.

B. If the employee **does** fall under one of these protected classes, the employee should follow the steps listed in the message. After they have updated the information using the steps listed, they can return to this task to click “Submit” to remove it from their inbox.

12. Review and Sign Documents

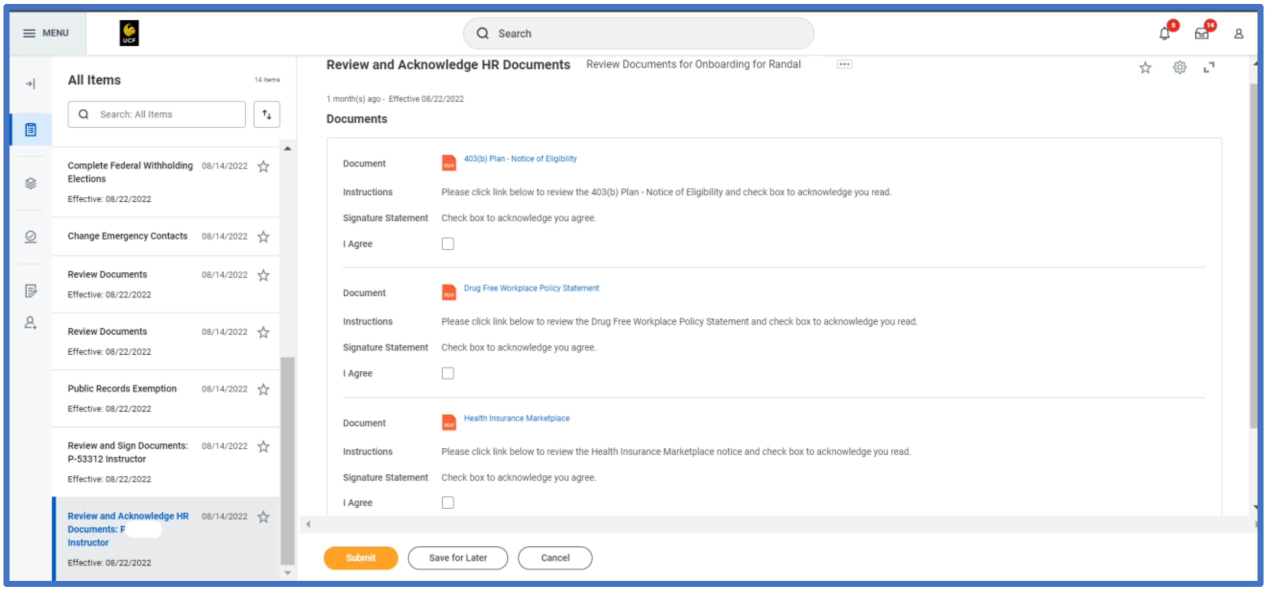
This onboarding task requires that the employee sign the Retirement Notification, Employee Acknowledgement Form, and Two-in-1 Form.



A. Each document has a blue link where they can view the document, but they should click the "eSign by Docusign" blue button at the bottom of the message to sign all three forms.
B. After the three forms have been signed via Docusign, the task will be removed from the employee's inbox.

13. Review and Acknowledge HR Documents

This onboarding task requests that the employees read each of the linked documents and acknowledge that they have read the documents.



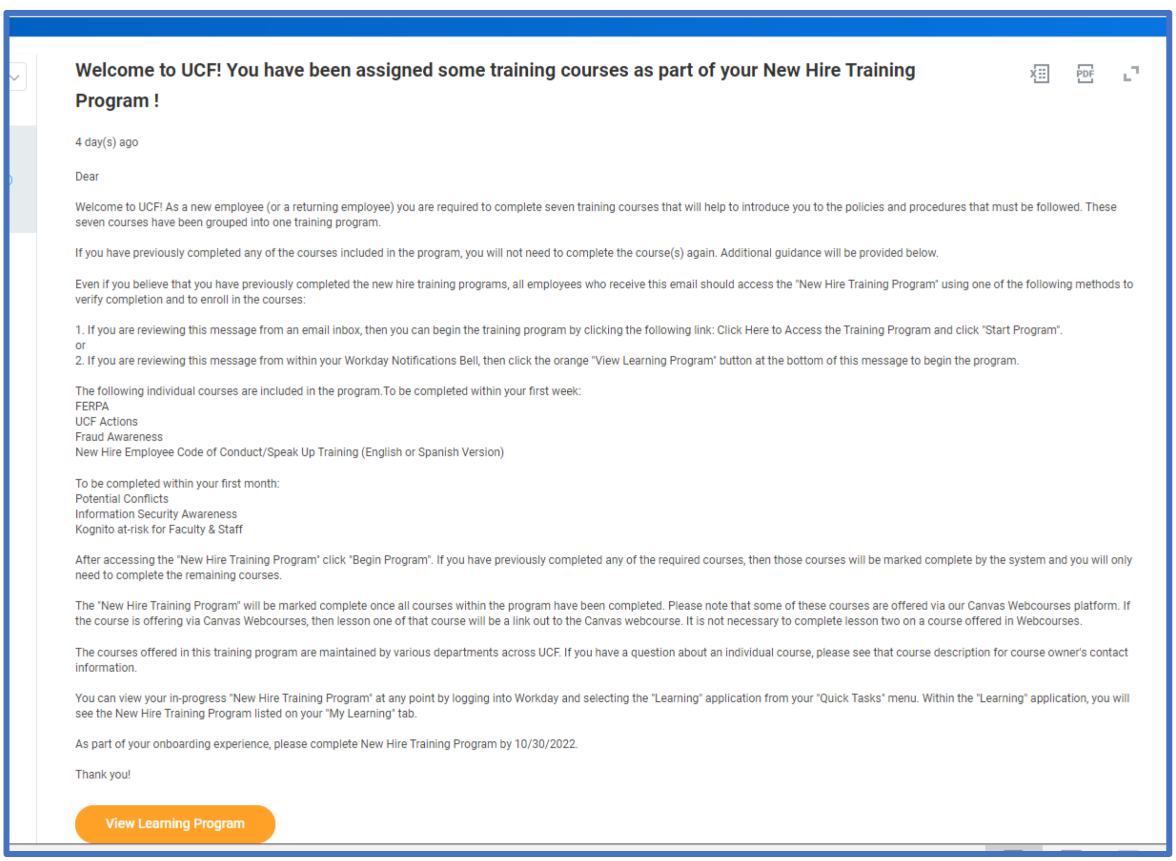
A. The employees can click each blue document link to read the document and then check the “I agree” checkbox under each document to confirm that they have read the document.

B. After all three documents have been agreed to with the check box marked, the employee can click “Submit”.

14. New Hire Training Program Email

NEW EMPLOYEE (AND RETURNING EMPLOYEE) TRAINING PROGRAM

- Prior to Workday, employees were provided a list of 8 new hire training courses that they had to go to PeopleSoft Employee Self Service to search for the required trainings courses one-by-one.
- With the implementation of Workday, new hire employees no longer need to manually search for the new hire trainings as the system! The number of new hire trainings was also reduced from 8 to 7. Workday will automatically send what is known as the “New Hire Training Program” to the employee on their hire date.
  - This “New Hire Training Program” packages all 7 courses together in one group.
  - They will get an email notification when they are assigned this task.
  - **Additional details and a sample of this email is included in the screenshot below.**
  - **PLEASE NOTE: Individuals who previously worked for UCF will also receive this email when they are rehired. If the rehire has at any point in time previously completed the new hire training program courses, they do not need to take the courses again. These individuals will just need to do the following:**
    - Click the link in the email to access the New Hire Training Program.
    - Select “Begin Program” and then the system will verify whether they have completed the training requirements previously.
    - If all seven courses have been completed previously, they will get a trophy icon and a message letting them know that they have completed the program.



Welcome to UCF! You have been assigned some training courses as part of your New Hire Training Program !

4 day(s) ago

Dear

Welcome to UCF! As a new employee (or a returning employee) you are required to complete seven training courses that will help to introduce you to the policies and procedures that must be followed. These seven courses have been grouped into one training program.

If you have previously completed any of the courses included in the program, you will not need to complete the course(s) again. Additional guidance will be provided below.

Even if you believe that you have previously completed the new hire training programs, all employees who receive this email should access the "New Hire Training Program" using one of the following methods to verify completion and to enroll in the courses:

1. If you are reviewing this message from an email inbox, then you can begin the training program by clicking the following link: Click Here to Access the Training Program and click "Start Program".
or
2. If you are reviewing this message from within your Workday Notifications Bell, then click the orange "View Learning Program" button at the bottom of this message to begin the program.

The following individual courses are included in the program.To be completed within your first week:
FERPA
UCF Actions
Fraud Awareness
New Hire Employee Code of Conduct/Speak Up Training (English or Spanish Version)

To be completed within your first month:
Potential Conflicts
Information Security Awareness
Kognito at-risk for Faculty & Staff

After accessing the "New Hire Training Program" click "Begin Program". If you have previously completed any of the required courses, then those courses will be marked complete by the system and you will only need to complete the remaining courses.

The "New Hire Training Program" will be marked complete once all courses within the program have been completed. Please note that some of these courses are offered via our Canvas Webcourses platform. If the course is offering via Canvas Webcourses, then lesson one of that course will be a link out to the Canvas webcourse. It is not necessary to complete lesson two on a course offered in Webcourses.

The courses offered in this training program are maintained by various departments across UCF. If you have a question about an individual course, please see that course description for course owner's contact information.

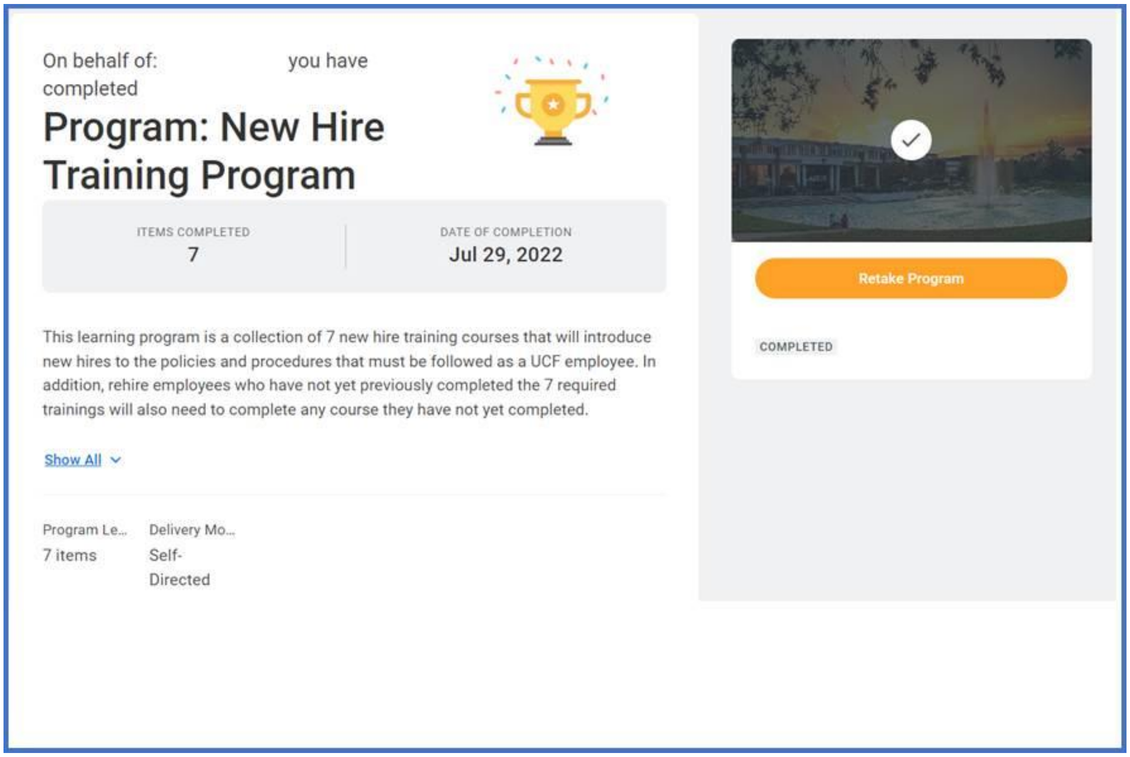
You can view your in-progress "New Hire Training Program" at any point by logging into Workday and selecting the "Learning" application from your "Quick Tasks" menu. Within the "Learning" application, you will see the New Hire Training Program listed on your "My Learning" tab.

As part of your onboarding experience, please complete New Hire Training Program by 10/30/2022.

Thank you!

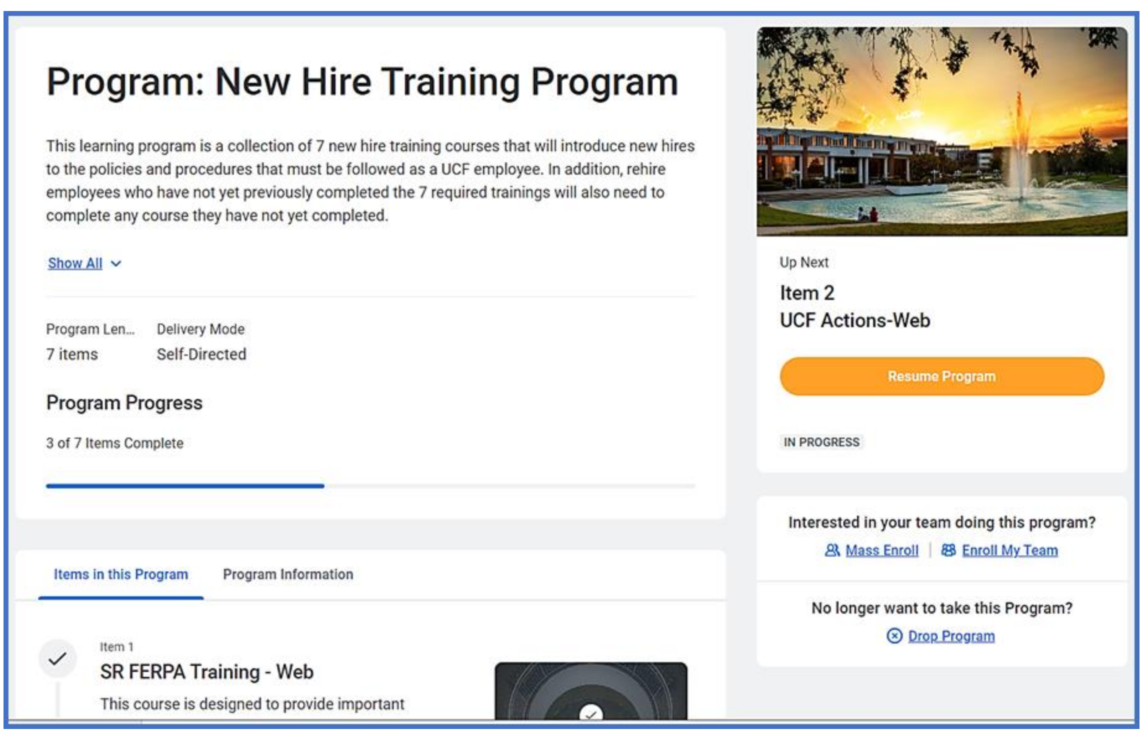
View Learning Program

<u>What it looks like when they successfully completed all 7 training courses:</u>



<u>What it looks like when they still have more courses to complete:</u>

You can see that they have completed 3 of 7 of the new hire trainings:



15. New Employee Orientation Email

NEW EMPLOYEE ORIENTATION

- Prior to Workday, the department reviewed the available NEO sessions from a list in PageUp and employees filled out a New Employee Orientation form that was sent to Central HR. The new hires were then manually added to the New Employee Orientation course sessions.
- Now in Workday, A&P, USPS, Executive Service, and Faculty employee's will receive an automated Workday system message on their hire date asking them to enroll in the first available New Employee Orientation course offering.
  - HR Business Centers should let the employees know that this email is coming and that they should select the soonest available orientation session as quickly as possible.
  - Unlike in the past, they will not be able to take orientation on their first day of hire as they cannot enroll prior to their first day.
    - The orientation team requires advanced notice that an employee is attending and since they cannot enroll until their first day, they won't be able to join an orientation date that is on their first day.

Welcome to UCF! Important Information Regarding Registering For Your New Employee Orientation Training!

4 day(s) ago

Dea

Welcome to UCF!

We look forward to you attending New Employee Orientation. Orientation provides an overview of UCF's culture and mission, as well as information on payroll and benefits. Important policies and procedures are discussed, and various support resources available to UCF employees are presented.

If you have already registered for a New Employee Orientation session, we look forward to seeing you soon. If you have not yet registered for orientation, please work with your department or supervisor to select an orientation date that best meets your onboarding schedule. Due to time-sensitive benefits deadlines, we ask that this date be as close as possible to your first day of work and not more than two weeks beyond.

Please enroll in New Employee Orientation by doing either of the following:

1. If you are reviewing this message from an email inbox, then you can enroll in the course by clicking the following link: Click Here to Select Your Orientation Date and select "Enroll".

2. If you are reviewing this message from within your Workday Notifications, then click the orange "View Course" button at the bottom of this message to enroll.

When choosing a date, please note that sessions occurring after September 2 will be held face-to-face in the HR Training Room (3280 Progress Drive, Suite 100). Each face-to-face session runs from 8:30 a.m. to 3:00 p.m. and includes a shuttle tour of campus and lunch at '63 South.

We look forward to seeing you at New Employee Orientation soon!

Charge On!

The HR Learning & Organizational Effectiveness Team

View Course