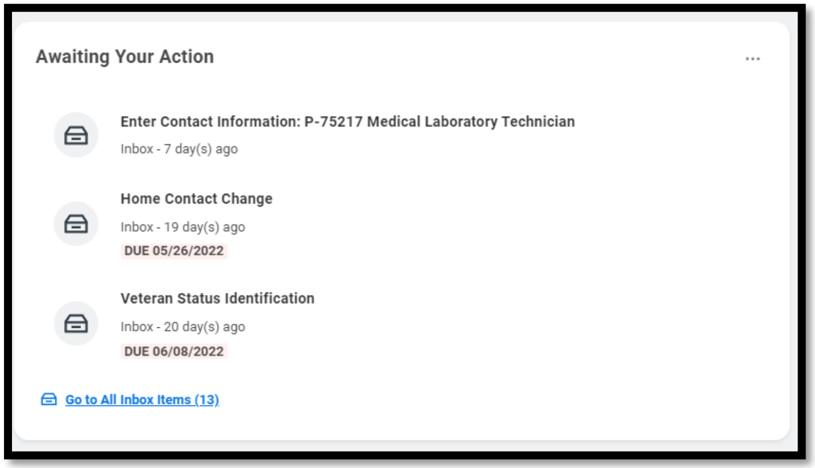
New Hire Onboarding: Employee Tasks

WHAT IS ONBOARDING?

Onboarding provides a set of tasks to ensure your record is completely updated in our HR & Payroll system. You can find these tasks in your **Workday inbox** by clicking **Go to Inbox**.



There are several tasks you'll need to complete as part of Onboarding. Some are available to you prior to your start date while others will appear in your Workday inbox on or after your start date.

This job aid covers all tasks that have the potential to be completed on or after your start date.

You may have already completed some tasks prior to your first day, which is great!

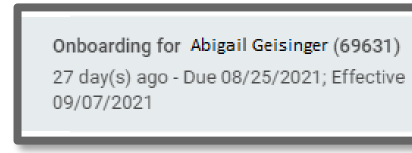
It's important to complete the following tasks within 5 days of your start date.

Document Tasks

REVIEW DOCUMENTS FOR ONBOARDING

There are several documents you will need to review

1. Click the **Onboarding for [your name]** task. The top of the screen will say **Print Generated Document**.



2. The first one will be a PDF called **Hire Position Acknowledgement**. Click on the blue link and review the document.
3. Then use the **arrow** in the top left corner to return to your Inbox

4. Check the **I Agree** box.
5. **Repeat steps 2-4** for all documents on the screen. The remaining documents are instructions for how to use **UKG**, which is our Timekeeping system.
6. Once you've checked all the I Agree boxes, click **Submit.**

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Personal Information Related Tasks

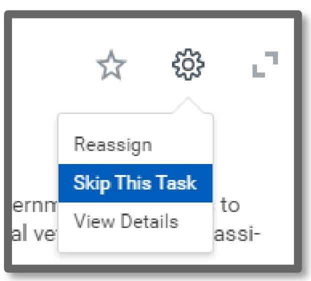
ENTER CONTACT INFORMATION

It is extremely important that we have your correct contact information. Your address drives many things including taxation.

7. Click the **Enter Contact Information** task. The top of the screen will say **Enter Contact Information**.
8. Using the **Edit icon**, enter in your **Primary Address**. Be sure to select **Mailing*, Payroll Tax Form, and Street Address** as the **Usages**.

Note: If you have a mailing address that is separate from your street address (such as a PO Box), click **Add** under **Additional Address** and fill out the address fields. You should list **Mailing** as the usage for your additional address and **Payroll Tax Form** and **Street Address** for your **Primary Address**.

9. Using the **Edit icon**, enter in your **Primary Phone Number** and **Primary Email**.
10. Review the information under the **Work Contact Information** section. If you know your **Work Phone Number**, input it.
11. Click **Submit** to save your changes.



VETERAN STATUS IDENTIFICATION

This task is an optional step that allows you to self-identify your veteran status. **You can choose to skip the task** by clicking the gear icon and selecting Skip This Task, **or you can complete the form using the following steps:**

1. Click the **Veteran Status Identification** task. The top of the screen will say **Change Veteran Status Identification**.
2. **Read the screen**.
3. **Select** a veteran status in the drop down.
4. Click **Submit** to save your changes.

DISABILITY SELF-IDENTIFICATION

This task is also an optional step, and it allows you to self-identify your disability status. **You can choose to skip the task** by clicking the gear icon and selecting Skip This Task, **or you can complete the form using the following steps:**

1. Click the **Disability Self-Identification for Onboarding** task. The top of the screen will say **Change Self-Identification of Disability**.
2. **Read the screen**.
3. **Select** the appropriate option by clicking the radio button.
4. Click **Submit** to save your changes.

CHANGE EMERGENCY CONTACTS

It is important that we have up-to-date emergency contact information for you, in the event of an emergency.

1. Click the **Change Emergency Contacts for Onboarding** task. The top of the screen will say **Change Emergency Contacts**.
2. Using the **Edit icon**, enter in the **Legal Name** and **Relationship** for your **Primary Emergency Contact**.
3. Click **Add** to enter the **Primary Phone Number**.

4. If you have an **Alternate Emergency Contact**, you can click **Add** and repeat steps 2-3 for this person.
5. Click **Submit** to save your changes.

ID CHANGE

It is of the utmost importance that your **Social Security Number** is on file. This information is vital for correct payment and taxation.

1. Click the **ID Change** task. The top of the screen will say **Edit Government IDs**.
   You may have already entered your **Social Security Number** at the time you signed your **Offer Letter**.
2. If you did, click **Submit.**
3. If you did not, enter it now. **You will be required to attach an image** of your **Social Security Card** for confirmation purposes. Then click **Submit** to save your changes.

Payroll Related Tasks

COMPLETE FEDERAL WITHHOLDING ELECTIONS

Federal Withholding Elections is your W-4 form, which must be completed for proper taxation.

1. Click the **Complete Federal Withholding Elections** task. The top of the screen will say **Complete Federal Withholding Elections**.
2. **Read** the screen and enter in all applicable information, specifically the required * information.
3. Click **OK** to save your changes.

PAYMENT ELECTIONS

You must set up your payment elections (direct deposit) prior to the end of the pay period in which you start.

1. Click the **Payment Election Enrollment Event** task. The top of the screen will say **Manage Payment Elections**.
2. **Read** the screen enter in all applicable information, specifically the required * information.
3. Click **OK** to save your changes

PRINTING ELECTIONS: W-2

1. Click the **Printing Elections: W-2** task. The top of the screen will say **Complete To Do: Printing Elections: W-2**.
2. **Read** the screen and follow the instructions.
3. When you are done, navigate back to your inbox 14 and be sure to click **Submit** on the task.

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Benefits Related Tasks

If you are benefits eligible, you will have three tasks to complete related to your benefit elections:

Benefits tasks **must be completed within 30 days of your start date**. However, it's *recommended* that you complete them within 5 days of your start date.

ADD DEPENDENTS FOR BENEFITS

1. Click the **Add Dependents for Benefits** task. The top of the screen will say **Complete To Do: Add Dependents for Benefits**.
2. **Read** the screen. If you have any dependents to add, click on the orange **Dependents** button.
3. Click Add.
4. Using the **Edit icon**, enter in all applicable information, specifically the **required** * **information and National ID**.
5. Click **Submit**.
6. Repeat steps 3-4 for all your Dependents.
7. When you are done, navigate back to your inbox and be sure to click **Submit** on the task.

CHANGE BENEFITS

1. Navigate to your Home page by clicking on the Workday icon in the top left corner.
2. Click the Need Help? icon in the top right. This feature is called **WalkMe**. It's available for common processes you may need to perform as a Geisinger employee.
3. **For this occasion, click on** New Hire Benefit Enrollment
4. Follow the **on-screen prompts** to complete your Benefit Enrollment.

PRINTING ELECTIONS: 1095-C

1. Click the **Printing Elections: 1095-C** task. The top of the screen will say **Complete To Do: Printing Elections: 1095-C**.
2. **Read** the screen and follow the instructions.
3. When you are done, navigate back to your inbox and be sure to click **Submit** on the task.