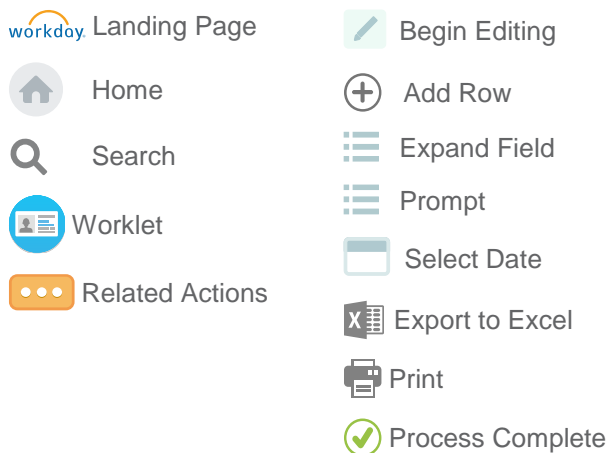


Transform your workday

Workday Basics

Workday is a system used to manage HR, Payroll and Benefits for UM. Workday has user-friendly navigation, allowing you to easily access information with simple, hassle-free tools. It is mobile friendly, allowing you to stay connected wherever you are. Below are some basic navigation tools to help you get started in Workday:



Complete assigned Onboarding Tasks in Workday





When you log in to Workday for the first time, you will see navigation hints.

1. When you are ready, click on **Let's get started!**
2. Click on your name at the top right hand corner to open your navigation menu, then click on **Inbox** to access your assigned onboarding tasks

Review Documents

1. Click **Review Documents**
2. Click on each linked document and review
3. Check the box next to *I Agree* where applicable
4. Click **Submit**

Enter Contact Information

1. Click on **Enter Contact Information**
2. Under *Primary Address*, click **Add**
3. Click  to select *Country* (select **United States of America**)
4. Enter *Address Line 1*
5. Enter *City*
6. Click  to select *State*
7. Enter *Postal Code*
8. Click **Done**
9. Under *Primary Phone*, click **Add**
10. Click  to select *Phone Device*
11. Click  to select *Country Phone Code* (select **United States of America**)
12. Enter 3 digit *Area Code*
13. Enter 7 digit *Phone Number*
14. (Optional) Enter *Phone Extension*
15. Click **Done**
16. Click **Submit**
17. Click  to refresh your *Inbox*



Complete Form I-9

1. Refer to the [Complete Form I-9](#) tip sheet to complete this task

Enter Personal Information









Note: Gender and Date of Birth cannot be edited; contact Central Faculty.

1. Review your Personal Information. Refer to the [View & Update Personal Information](#) tip sheet if you need to make edits









2. Click **Submit**

Change Emergency Contacts

3. Click on **Enter Emergency Contacts**

4. Click  to edit *Legal Name*
 - Click  to select *Country* (if other than **United States of America**)
 - Enter *First Name*
 - Enter *Last Name*
 - Click **Done**
5. Click  and then  to select *Relationship*
6. Under *Primary Phone*, click **Add**
 - Click  to select *Phone Device*
 - Click  to select *Country Phone Code* (if other than **United States of America**),
 - Enter 3 digit *Area Code*
 - Enter 7 digit *Phone Number*
 - (Optional) Enter *Phone Extension*
 - Click **Done**
 - Click  to select *Type*
7. Under *Primary Email*, click **Add**
 - Enter *Address*
 - Click  to select *Type*
8. Continue to *Alternate Emergency Contacts (Evacuation Information)*

Alternate Emergency Contacts (Evacuation Information)


9. Under *Alternate Emergency Contacts*, click **Add**
 - Click  to select *Country* (select **United States of America**)
 - Enter *First Name*
 - Enter *Last Name*
 - Click **Done**
10. Click  to select *Relationship* and choose **Evacuation Address Only**
11. Enter at least one form of contact (phone number or email address)
 - Click  to enter *Phone Number*
 - Click  to select *Phone Device*
 - Click  to select *Country Phone Code* (select **United States of America**),
 - Enter 3 digit *Area Code*
 - Enter 7 digit *Phone Number*
 - (Optional) Enter *Phone Extension*
 - Click **Done**
 - Click  to select *Type*
 - Click **Done**
 - Click  to enter *Primary Email*
 - Enter *Primary Email*
 - Click  to select *Type*
 - Click **Done**
12. Click **Submit**



Add Payment Elections

1. Click on **Add Payment Elections**
2. Click on the **Add Payment Elections** button
3. Select *Account Type*
4. Enter *Bank Name*
5. Enter *Routing Transit Number*
6. Enter *Account Number*
7. Click **OK**
8. If you need to add another account, click **Add Account** and repeat steps 3-7
9. To make edits to an account that was already added, click **Change Account**
10. To remove an account that was already added, click **Delete Account**
11. Click **Done**
12. Click **Submit**

Complete Federal Withholding Elections

1. Click on **Complete Federal Withholding Elections**
2. Click  to select *Marital Status*
3. Enter *Number of Allowances*
4. Check the box next to *I Agree*
5. (Optional) Please review to see if any of the other fields are relevant to you
6. Click **Submit**

Change Benefits

1. Refer to the [Benefits Enrollment for New Hire](#) tip sheet to complete this task

Related Links & Policies

- [UM Policies and Procedures](#)
- [Faculty Manual](#)

Related Tip Sheets

- [Change Contact Information](#)
- [Complete Form I-9](#)
- [Change Legal Name](#)
- [Change Preferred Name](#)
- [View & Update Personal Information](#)
- [View Your Employee Profile](#)
- [Tax Elections](#)
- [Payslips](#)
- [Payment Elections](#)
- [Payroll Calendars](#)
- [Benefits Enrollment for New Hire](#)