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:

- Landing Page
- Home
- Search
- Worklet
- Related Actions
- Begin Editing
- Add Row
- Expand Field
- Prompt
- Select Date
- Export to Excel
- Print
- Process Complete

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*

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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**

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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