**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

**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**
Onboarding: Faculty

**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**
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