Day 1 Checklist

Complete this checklist when you login to Workday!

Accessing Workday
- To access Workday, use Google Chrome, the recommended browser for Workday.
- Navigate to myapps.microsoft.com (bookmark this page!)
- Login with your institution credentials for Office 365.
  - You may be prompted to authenticate via Multi-Factor Authentication (MFA) or set up MFA if you have not done so previously.
- Locate and click the ‘Workday’ icon from the available applications list.
  - When you click the Workday app, you will be prompted to validate MFA again to log into Workday. This is normal security protocol.
- You will automatically be logged into Workday.

Multi-Factor Authentication (MFA) Setup
- If you have not previously set up MFA to access the Workday Training App, you will be prompted to set up MFA the first time you log into Workday.
- This short video explains how to set up MFA to access Workday.

Record Your Time Worked
- Starting on July 7, if you are an hourly or non-exempt employee and not on TimeClock Plus, you should start recording your time worked in Workday.

Review your Personal Information
- To access your Workday profile page, click your Profile icon, then View Profile.
- Add your professional photo by clicking Actions > Personal Data > Change My Photo.
- Add or edit your contact information under the Contact tab.
  - Addresses
  - Email Addresses
  - Phone Numbers
- Add or edit your emergency contacts under the Contact tab.
- Modify your Personal Information by clicking on the Personal tab.
- If necessary, change your legal name or preferred name by clicking Actions > Personal Information > Change My Legal Name / Change My Preferred Name.
- Check to see if your Manager is correctly listed.
  - Let your Manager know if this information is incorrect.

Review your Benefits
- View your benefits elections by clicking the Benefits App on your home page.
- Verify your benefits elections are correct by clicking the Benefit Elections button.
  - Let your HR team know if this information is incorrect.
- View or add dependents by clicking Change > Dependents.
- Add beneficiaries by clicking Change > Beneficiaries.
  - This must be completed when you log into Workday!
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Review your Payment Options
- View or edit withholding deductions by clicking Actions > Withholding Elections.
- Add or edit a direct deposit account and manage payment elections by selecting Actions > Payment Elections.
- View your tax documents by clicking View > My Tax Documents.
- In the future, you can view or print payslips by clicking View > Payslips.

Review your Time Off and Leave of Absence Balances
- View time off and leave of absence balances by clicking View > My Absence.
  - Let your Manager know if this information is incorrect.
  - On July 7, your time off and leave of absence requests will be up-to-date as of April 2020. On July 10, your time off and leave of absence requests will be fully up-to-date.
- Submit upcoming time off and leave of absence requests by clicking Request > Request Absence.

Change Your Work Space
- In the Search bar, type Change My Work Space.
- Enter the Effective Date of today, and your Work Space.
- Update your Work Space to your current building and room location.
- Click Submit.

Check your Workday Inbox
You can access your Inbox using your desktop/web browser or mobile device.
- Access your Workday Inbox by clicking the Inbox icon next to your Profile icon.
  - Your Inbox includes tasks, approvals, to dos, and other items sent to you as part of your institution’s business processes.
- Click the Actions tab to view your business process tasks, approvals, and to dos.

MANAGERS ONLY: Review and Manage your Direct Reports
All Managers have the My Team Management app on their Workday home page.
- Review your direct reports in My Team.
  - My Team displays the photo, name, job title, and work location of all employees you supervise.
  - You may need to click View More to view your full team. Clicking on an employee will take you to their Workday Profile.
  - Alert your institution’s HR Partner and Security Partner if your direct reports listed are incorrect.