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!*

Day 1 Checklist

Complete this checklist when you login to Workday!

workday.

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.