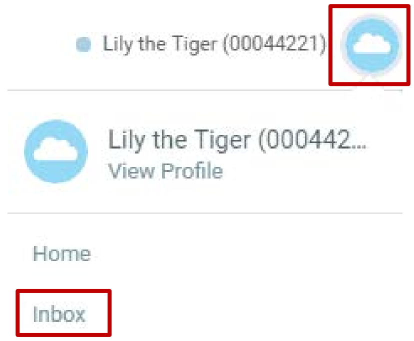
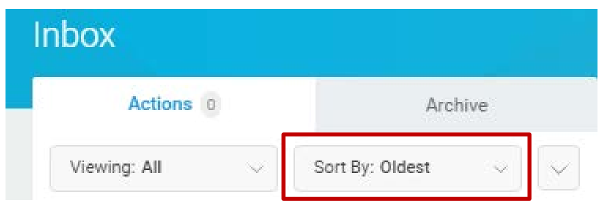
ONBOARDING

1. Log into Workday using your LSU username and password. First time screen information will appear. Click **Let's Get Started!** button to proceed.



2. Click on the **cloud icon** on the right hand side of the screen.
3. Click the **Inbox** option under the cloud.

4. From your Inbox, change **Sort By:** to **Oldest.** *(You need to complete your onboarding steps beginning with the oldest actions.)*



5. Starting with the first (oldest) item, Complete all Action Items in your Inbox:
   - **Personal Information Change** Action Item
     i. Complete all sections including: **Gender**, **Date of Birth**, Marital Status, Race/Ethnicity, **Citizenship Status**, Nationality, Disability, Military Service, and any comments. You can click the **pencil** to access a section; click the **check mark** to close the section.
     ii. Click **Submit** (Save for Later or Close). Click **Done.**
   - **Enter Contact Information** Action Item
     i. Complete/confirm **Home Contact Information** (**Primary Address**, Additional Address, **Primary Phone**, **Primary Email**, Primary Instant Messenger, Primary Web Address). Click the **pencil** to the right to access a section. Click the **check mark** to close a section.
     ii. Click **Submit** (Save for Later or Close). Click **Done.**

Once you have completed those Action Items in your Inbox, additional Action Items will appear in your Inbox.

NEXT STEP: COMPLETE ADDITIONAL ACTION ITEMS IN YOUR INBOX (The following action items may not appear in the same order. Complete them from oldest to newest.)

- **Disability Self-Identification** Action Item
    i. Review and complete information as required. Please select one: **Yes I have a disability**, **No I do not have a disability**, or **I do not wish to answer.**
    ii. Add any comments.
    iii. Click **Submit** (Save for Later or Cancel). Click **Done.**
- **Add Payment Elections** Action Item
    i. Click the **Add Payment Elections** button to add your banking (direct deposit) information.
    ii. **Confirm Payment Type** > Direct Deposit
    iii. **Use for Pay Type** > Expense Payment and/or Payroll Payment
    iv. Under Account Information, complete the following:
        - Account Nickname (optional)
        - **Account Type** (checking or savings)
        - **Bank Name**
        - **Routing Transit Number** (ABA Number)
        - **Account Number**
    v. Click **OK** (or Cancel).
    vi. Confirm information entered is correct.
    vii. Click **Done.**
    viii. Click **Submit.** Click **Done.**
- **Complete Federal Withholding Elections** Action Item
    i. Review and complete information as required in the W-4 Data section (**Marital Status**, **Number of Allowances**, etc.); click **I Agree** and add any comments.
    ii. Click **Submit** (Save for Later or Cancel). Click **Done.**
- **Complete Form I-9** Action Item
    i. Review and complete information as required (**Name, Other Names Used** [If no other names used, check **N/A**], **Address, Date of Birth,** and **Social Security Number**).
    ii. Check appropriate box regarding Citizenship and complete additional information as required
    iii. Click **I Agree** checkbox.
    iv. **If completed by a Preparer and/or Translator, complete the Preparer and/or Translator Certification and check the box by I Agree.**

v. Add any comments if necessary.

vi. Click **Submit** (Save for Later or Cancel). Click **Done.**

- **Complete State Withholding Elections** Action Item

  i. Complete/confirm **Company** and **State**. Click **Continue.**

  ii. Complete **Marital Status**, Dependents, Personal Exemptions, Increase or Decrease Withholding Amount. Click **I Agree.**

  iii. Click **OK**. Click **Done.**

- **Nepotism** Action Item

  i. Select **YES** or **NO**. If you answered **YES**, enter relative's information in the text box provided – including name(s), relationship(s), and department(s).

  ii. Click **Submit** (Save for Later or Cancel). Click **Done.**

- **Veteran Status Identification** Action Item

  i. Read and select your answer; add any comments.

  ii. Click **Submit** (Save for Later or Cancel). Click **Done.**

- **Prior State Service** Action Item

  i. Answer all questions on the questionnaire.

  ii. Click **Submit** (Save for Later or Cancel). Click **Done.**

- **Change Emergency Contacts** Action Item

  i. Add **Emergency Contacts** to your Worker Profile.

  ii. Complete **Legal Name, Relationship, Primary Address**, and **Primary Phone**. Click **Add** button under Alternate Emergency Contacts to add additional contacts. Click the **pencil** to the right to access a section. Click the **check mark** to close a section.

  iii. Click **Submit**. Click **Done.**

- **Review Documents** Action Item

  i. Click on each Document Link and review, then click **I Agree** checkbox next to each document. Documents include: **Loyalty Oath**, **Misuse of Drugs and Alcohol Policy – PS-67** (only for LSU Baton Rouge employees)**, Equal Opportunity Policy PS-1** (only for LSU Baton Rouge employees)**, Title IX and Sexual Misconduct Policy, LSU Board of Supervisors Bylaws and Regulations, LSU Permanent Memoranda, and Campus Policies and Procedures Acknowledgement**, and **Health Insurance Coverage Notice.**

  ii. **New Employee Orientation** link is also included (only for LSU Baton Rouge employees). Please click on the link for registration instructions.

- **Annual Leave Accrual Election** Action Item (will only appear for leave eligible and unclassified employees)

  i. Review the Leave Accrual information and select your desired leave accrual. **This election is IRREVOCABLE.**

    - **LSU Schedule** – Accrual rate based on 14 hours per month, maximum of 176 hours for first 10 years.
    - **Civil Service Schedule –** Accrual rate starts at 8 hours per month, no maximum leave balance. Accrual rate increases over 15 year period.

  ii. **If "None of the above" is selected, you will be automatically defaulted into the LSU accrual schedule.**

iii. Click **Submit** (Save for Later or Cancel). Click **Done.**

iii. You can add comments.

iv. Click **Submit** (Save for Later or Cancel). Click **Done.**

- **Complete To Do: Benefit Election-Dependent** Action Item

  i. If adding dependents to benefit coverage, please click **Dependents** button in order to add dependents to benefits.

  ii. Click **Add** button.

  iii. Complete **Effective Date**, **Reason**, Use as Beneficiary, **Legal Name, Gender, Date of Birth,** Citizenship, Nationality, Full Time Student, **Relationship**, **Primary Address, Primary Phone**, Primary Email, National ID (Social Security Number), and Government IDs.

  iv. Click **Submit.**

- **Review Documents** Action Item is now in Inbox.

  i. Attach required dependent verification documents. A list of required documents is attached for your review.

  ii. Click Select Files to upload your document(s). Select file(s) and click **Open.** Type in comments under the attachment name.

  iii. Click **Submit.** Click **Done.**

  iv. Dependent Verification documents must be reviewed and approved by your campus HRM. Once the documents have been approved, you will receive a Change Benefit Elections task (action item) in your inbox.

- **Change Benefit Elections New Hire** Action Item is now in inbox. You have 30 days from your hire date to select and submit your benefits elections. Please review the information you received at New Employee Orientation for your options when making your selections.

  i. Review all **Health Care Elections** (health insurance, dental and vision options appear on this screen), and make your selections, as desired. Enroll dependents at this time by selecting Employee + Spouse, Employee + Child(ren) or Employee + Family. (If your dependents are not listed under **Enroll Dependents** prompt, please confirm with the Benefits Department that your request to add dependents has been approved. That step must be approved before your dependents will appear.) Click **Continue.**

  ii. **Health Savings Account Plan (HSA)** – If you enrolled in the Pelican HSA 775 health plan then you are eligible to participate in the HSA. You will receive an inbox item after enrollment with a link to the form that is needed to enroll in the HSA. The completed form should be submitted to HRM. If you are not eligible, the Elect/Waive radio buttons will not be active. Click **Continue.**

  iii. Review **Spending Account Elections** and make your selections, if desired. Click **Continue.**

  iv. Review **Insurance Plan Dependencies and Coverage Limitations** (Life, AD&D, Long Term Disability and Critical Illness), and make your selections, if desired. Click **Continue.**

  v. Review your **Beneficiary Designations.** Add beneficiaries, as applicable by clicking the plus **+** icon next to each Benefit Plan that allows you add beneficiaries. You can add **Beneficiary Persons** (who have already been put into the system), add **Trusts** (that have already been put into the system), or you can **Create** Beneficiaries (Add Beneficiary, Add Beneficiary Using Existing Contact or Add Trust). If you have not selected any plans that are benefit eligible, this section will be blank. Click **Continue.**

  vi. Carefully review your elections, click the '**I Agree' checkbox**, and click **Submit.** Once you click Submit, you have the option to **Print** your Elections Confirmation for your records. Once you have printed your elections click **Done.**

Once you have completed those Action Items in your Inbox, the Onboarding process will route for approvals. Once approved, the process is complete.