INTRODUCTION

New hires (including rehires) at Marathon County add much of their personal information in Workday during the onboarding process. You may encounter some onboarding tasks that are not covered in this guide. These will show up in your Workday Inbox when it is time to complete.

ONBOARDING APPLICATION

The **Onboarding** application appears under **Menu**. A message from your Manager will display along with helpful contacts and County information you need to review. *Go to the Onboarding Application in this aid to learn more.*

All Onboarding tasks appear in your Workday Inbox.

Once you are hired, you will receive an email notification to log into Workday to complete tasks. *You are encourgaced to compelte these tasks prior to your start date.*

Your first three tasks are:

- Edit Government IDs
- Review Name and Home Contact Information
- Change Personal Information

Once those are completed, several more will be sent to your Workday Inbox.

ID CHANGE: EDIT GOVERNMENT IDS

1. To locate this task, click on your **Workday Inbox** and select Edit **Government IDs** task. *You will be required to present the government ID documents on your first day.*
2. If your **ID** is already populated, click **Submit**.
3. Under national IDs, click the **Add Row** icon ⊕
4. Select the **Country** and **National ID Type**. Enter the **Identification #**.

*National ID Type	Identification #
✕ Social Security Number (SSN) ☰	123-45-6780

5. Type in or use the calendar icon to select the **Issued** and **Expiration Dates**. If entering in your SSN, you would not need to enter in an expiration date as they don't expire.

REVIEW NAME AND HOME CONTACT INFORMATION

To locate this task, click on your **Workday Inbox** and select the **Review Name and Contact Information** task.

1. Use the **Pencil** ✎ icon to edit your **Legal Name** if applicable. You must attach the appropriate documentation, such as a new social security card if you change your legal name at this time.
2. *If you would like to use a preferred name* (e.g., Susan vs Sue) deselect **Use Legal Name as Preferred Name** if they differ and enter your preferred **First** and **Last Name**.

Use Legal Name As Preferred Name ☐

3. Click **Add** to add a **home address**. Enter your **Address**, **City**, select the **State** and enter the **Postal Code**. Select the **Usage**.
4. Click **Add** to add a **phone number** and **email**. Select the **Usage**.
5. Click **Submit** and **Done**.

CHANGE PERSONAL INFORMATION

To locate this task, click on your **Workday Inbox** and select the **Change Personal Information** task. This is needed for Federal and State EEOC reporting. Use the **Pencil Icon** ✎ to make updates to each section.

1. Select your **Gender**.
2. Use the calendar icon or enter in your **Date of Birth**.
3. Select your **Race/Ethnicity** if needed. Select **Hispanic or Latino** if applicable.
4. Marital Status, Gender Identity and Disability are note required, but you can enter information in these fields.
5. Click **Submit**.

Note: **Finding Workday Aids**:

To view aids, videos, and FAQs for Workday, click **Menu** and scroll down to the bottom under **External Links**. Click on **Help- Workday Job Aids**, to be taken to our Support Site.

**External Links**

🔗 HELP - Workday Job Aids

The next tasks to be completed are:

- Payment Election
- Veteran Status Identification
- Change Emergency Contacts
- Photo Change
- Change Benefits for Life Event (if applicable)

PAYMENT ELECTION

Adding or changing account for Direct Deposit

1. From your home page, click on your profile icon in the upper right of Workday and click **View Profile**.
2. Choose **Pay** tab on the left.
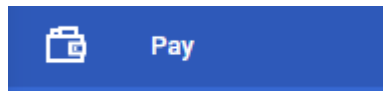
3. From the top banner, select **Payment Elections**

Tax Elections   Payment Elections   Payslips   Tax Documents   Absence Balance

4. Under **Accounts**, you can Edit, Remove or View the existing account(s). There must always be an account listed before removing one.
5. To add a new account, click **Add**.
6. **Direct Deposit** is the only option for Marathon County.
7. Using a check from your bank account, enter in your **Routing Transit Number, Bank Name, choose the Account Type and Account Number.** Click **OK**.

8. To add another account(s), click **Add**.

> **Note**: You can only remove an account, once another one has been entered. For Payroll, you are allowed a maximum of 8 accounts to be added for direct deposit. Also, if this change is done during payroll processing, it may not be updated until the next pay period.

PAYMENT ELECTIONS

Modify distributions of Direct Deposit accounts

1. If you have set up multiple accounts, you can change the distributions under **Payment Elections**.
2. Click **Edit** on the **Payroll Payment Election Rule** to modify the distribution between accounts.

3. When you go into Edit, you need to click the **Add** icon to add more rows. This is how you break out the account distribtution.
4. You can choose **Balance, Amount or Percent**. If percent, it must come out to 100%.

5. If using multiple accounts with Balance chosen for one, it must be last one listed. Start with the accounts with the specific amount, and then end with the balance.

6. Click **OK** when complete. If this change is done right before processing, it may not be changed until the next pay period.

> **Note**: Expense only allows 1 account, which is your default direct deposit account. You can change this, but you need to always have one account set up.

VETERAN STATUS IDENTIFCATION

To locate this task, click on your Workday Inbox and select the **Veteran Status Identification** task.

1. Review the instructions text for this task.
2. Select a **Veteran Status** that applies to you.
3. If you have identified yourself as a protected veteran, select the applicable Protected Veteran Status in the boxes below.
4. Click **Submit** and **Done**.

CHANGE EMERGENCY CONTACTS

To locate this task, click on your Workday Inbox and select the **Change Emergency Contacts** task.

1. Use the **Pencil** icon 🖉 to enter a **Legal Name** and select a **Relationship** for your emergency contact.
2. Click **Add** under a Primary Phone, Additional Phone, Primary Email, Additional Email. Your emergency contact must have at least one.
3. You can add **an Alternate Emergency Contact**. Fill in the fields applicable.
4. Click **Submit** and **Done**.

PHOTO CHANGE

To locate this task, click on your **Workday Inbox** and select the **Photo Change** task.

1. **Drag and Drop** or **Select Files** in the attachments area to upload your headshot to Workday.
2. Use the **Toggles** to adjust your image as needed.
3. Click **OK**, then **Submit**. The photo routes to your HR Partner for approval.

CHANGE BENEFITS FOR LIFE EVENT

To locate this task, click on your Workday Inbox and select the **Change Benefits for Life Event** task. *You can start enrolling in benefits right away, but these will also be explained in more detail at New Employee Orientation. If you need help, please bring your IDs and dependent information (SSN/DOB) with you to Orientation.*

1. If this has been tasked to you, refer to **Change Benefits for Life Event** aid to complete the items listed.

On your Hire Date (start date), there will be three more tasks to complete:

- Complete Form I-9
- Complete Federal Withholding Election
- Complete State and Local Withholding Election

COMPLETE FORM I-9

To locate this task, click on your **Workday Inbox** and select the **Complete Form I-9** task. *This needs to be completed no later than the first day of your employment.*

1. Any fields with the red asterisk (*) are required. Make sure you are entering in your information as it is listed on your National ID (SSN or DL) and entering in full and complete information.
2. Select the correct box:

    ○ 1. A citizen of the United States

    ○ 2. A noncitizen national of the United States (See instructions)

    ○ 3. A lawful permanent resident (Alien Registration Number/USCIS Number):

    [   ]

    ○ 4. An alien authorized to work until (expiration date, if applicable, mm/dd/yyyy) Some aliens may write "N/A" in the expiration date field. (See instructions)

3. After filling in the field, **review the Signature of Employee** and click **I Agree**.
4. If Preparer or Translator was used, fill out the information below.
5. Once complete, hit **Submit**.
6. This will now be routed to your Department HR Assistant to complete the final steps of I-9.

> *REQUIRED: You will need to provide your two forms of ID to your Department HR Assistant on your first day of work for them to complete your authorization to work.*

COMPLETE FEDERAL WITHHOLDING ELECTIONS

To locate this task, click on your **Workday Inbox** and select the **Complete Federal Withholding Elections** task.

1. Any fields with the red asterisk (*****) are required. Make sure you are entering in your information as it is listed on your National ID (SSN or DL) and entering in full and complete information. You can click **View Blank Form** to see the paper W-4 form if this helps in filling this information out.
2. Select your **Martial Status**.
3. Enter in the information for **Multiple Jobs or Spouse Works, Claim Dependents- if applicable.**
4. Step 4- **Other Adjustments**- please read each section and if you choose any option, fill in the boxes.
5. Select **Exempt** or **Nonresident alien, if applicable**.
6. Then select **I agree** below to electronically sign the document. Click **Submit** and **Done**.

COMPLETE STATE & LOCAL WITHHOLDING ELECTIONS

To locate this task, click on your **Workday Inbox** and select the **Complete State and Local Withholding Elections** task.

1. The first screen, just verify the information is correct and click **OK**.

Company	× County of Marathon ···
Effective Date	09/08/2022
State *****	× Wisconsin
Withholding Form Type *****	× WT-4 - Withholding

2. Any fields with the red asterisk (*****) are required. Make sure you are entering in your information as it is listed on your National ID (SSN or DL) and entering in full and complete information. You can click **View Blank Form** to see the paper Wisconsin WT-4 form if this helps in filling this information out.
3. Select your **Martial Status**.
4. Enter in the boxed for **Exemptions**, if applicable.
5. Select **Exempt, if applicable**.
6. Then select **I agree** below to electronically sign the document. Click **Submit** and **Done**.

All your Onboarding tasks are now complete!

REMINDER: You should be logging into Workday frequently.
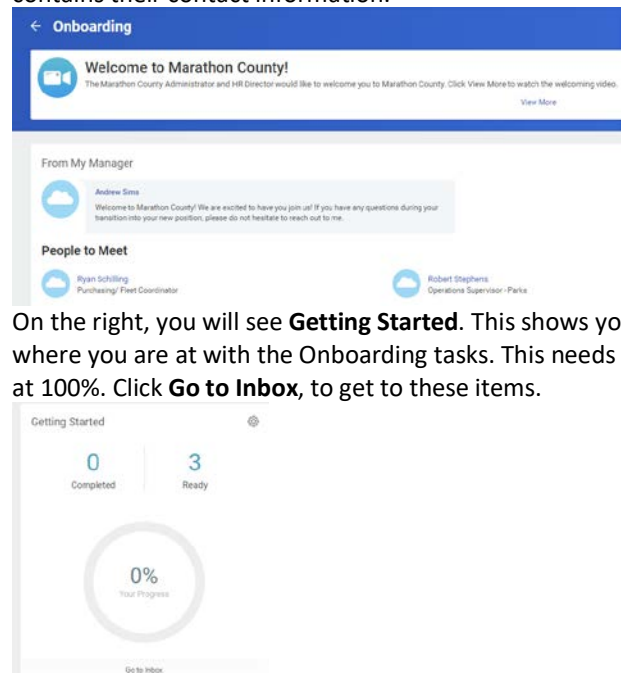
ONBOARDING APPLICATION

Under **Menu**, scroll down to **Onboarding Application**.

Review the following:
- Welcome Video
- Message from My Manager
- People to Meet
- Getting Started status
- Helpful Contacts
- County Information (REQUIRED)

Clicking on their **Name** takes you to their worker profile which contains their contact information.

On the right, you will see **Getting Started**. This shows you where you are at with the Onboarding tasks. This needs to be at 100%. Click **Go to Inbox**, to get to these items.

Review all the links under **County Information.**

County Information

Core Values
Link to our Core Values

Departments
Link to the County departments and their pages

2023 Payroll Calendar
Link to our 2023 Payroll Calendar

Questions, please reach out to your Department HR Assistant or Human Resources at: hr@co.marathon.wi.us