



# Onboarding

## Audience: Employees

### Overview:

This job aid provides an overview of how to access Onboarding activities in Workday. In the Workday Inbox, you will find onboarding tasks associated with your new role with the County. In most cases, these will be action items that need to be completed, such as I-9 form, updating personal information, payment election set-up and more.

This job aid covers:

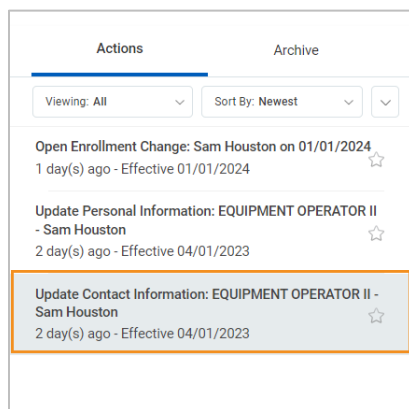
- |   |  |
|---|--|
| • <a href="#">Update Contact Information</a>  | • <a href="#">Complete Federal Withholding Elections</a>         |
| • <a href="#">Update Personal Information</a> | • <a href="#">Complete State and Local Withholding Elections</a> |
| • <a href="#">Review Documents</a>            | • <a href="#">Payment Election Enrollment Event</a>              |
| • <a href="#">Photo Change</a>                | • <a href="#">Change Emergency Contacts</a>                      |
| • <a href="#">Complete Form I-9</a>           |  |

## Update Contact Information

1. From the Workday homepage, click the **Inbox** icon.



2. Click the update task from the Inbox **Actions** tab que to **Update Contact Information**.





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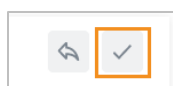
3. Click the **Add** button under Address, in the Change Home Contact Information section, to add a home address.

A screenshot of a web interface titled "Update Contact Information" with a subtitle "Onboarding for Sam Houston". Below the title, it says "13 day(s) ago - Effective 04/01/2023". The main heading is "Change Home Contact Information". Underneath, there is a section labeled "Address" containing a button with the text "Add". The button is highlighted with an orange border.

4. Update required address fields, indicated by a red asterisk. The Country will default to United States of America.

A screenshot of an address form. The title is "Address" and the subtitle is "New Address". There is a "Primary" checkbox which is checked. The "Country" field is a dropdown menu with "United States of America" selected. Below this are several text input fields: "Address Line 1" (with a red asterisk), "Address Line 2", "City" (with a red asterisk), "State" (with a red asterisk), and "Postal Code" (with a red asterisk). At the bottom, there are fields for "County" and "Usage", and a "Visibility" dropdown menu with "Private" selected.

5. Click the **check mark** icon in the upper right, to save information.





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6. Click the **Add** button under Phone, in the Change Home Contact Information section, to add a home phone contact number.

Change Home Contact Information

Address

Add

Phone

Add

7. Select the **Phone Type** (Fax, Landline or Mobile), add **Phone Number** and click the **check mark** to save.

Phone

(empty)

Primary

Phone Type \*

select one

Country Phone Code \*

United States of America (+1)

Phone Number \*

Phone Extension

Visibility \*

Private

8. Edit email address by clicking the **pencil** icon or click **Add** to include another email address.

Email

Primary

Yes

Email Address \*

sam@gmail.com

Visibility

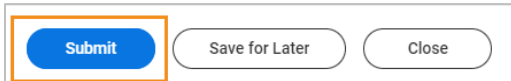
Private

Add

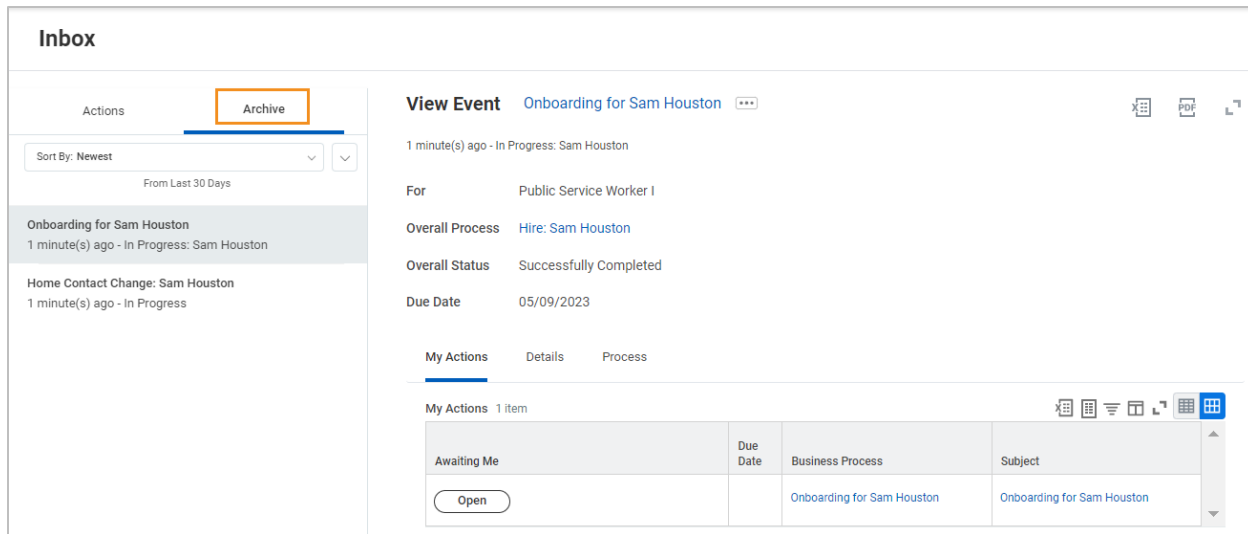


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9. Click Submit.



10. As tasks are completed, they can be found in your Inbox **Archive** tab. Additional Inbox tasks may appear on the Actions tab, based on the information provided.

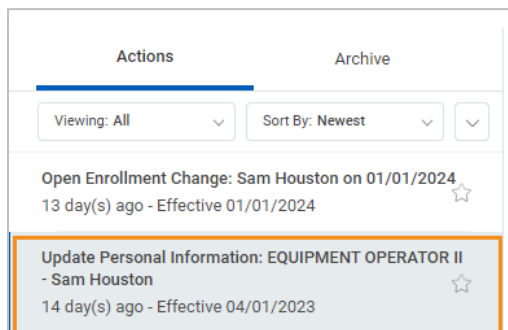


## Update Personal Information

1. From the Workday homepage, click the **Inbox** icon.



2. Click the next update task from the Inbox **Actions** tab que to **Update Personal Information**.





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- Update *Legal Name* by clicking on the **pencil** icon. Click the **check mark** to save.


**Update Personal Information** Onboarding for Sam Houston

14 day(s) ago - Effective 04/01/2023

**Legal Name**

Legal Name \*

Sam Houston



Legal Name

Name Sam Houston

Country \*  
United States of America


Prefix

First Name \*  
Sam

Middle Name

Last Name \*  
Houston

Suffix



- Update Preferred Name by clicking on the pencil icon. Unclick the **Use Legal Name As Preferred Name** box. Enter preferred name. Click the **check mark** to save.

**Preferred Name**

Preferred Name

Use Legal Name As Preferred Name

Yes

Preferred Name

Sam Houston



Preferred Name

Use Legal Name As Preferred Name

Name Sam Houston

Country \*  
United States of America


Prefix

First Name \*  
Sam

Middle Name

Last Name \*  
Houston

Suffix






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5. In the Change Personal Information section, edit the required fields, Nationality is optional. Click the **pencil** icon to edit. Remember to click the **check mark** to save in each section.


#### Change Personal Information

**Gender**

Gender \* 

---


**Date of Birth**

Date of Birth \* 

Age

---


**Marital Status**

Marital Status \* 

Marital Status Date

---


**Race/Ethnicity**

Hispanic or Latino 

Race/Ethnicity \*


---

**Citizenship Status**




Citizenship Status \* 

---

**Nationality**

Primary Nationality 

6. After editing and saving the updates, click **Submit**.

## Review Documents

1. From the Workday homepage, click the **Inbox** icon.





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## Audience: Employees

2. Click the update task from the Inbox **Actions** tab que to **Review Documents**.

### Inbox

Actions      Archive

Viewing: All      Sort By: Newest

- Review Documents**  
1 minute(s) ago - Effective 04/01/2023
- Photo Change  
1 minute(s) ago - Effective 04/01/2023
- Complete Form I-9  
1 minute(s) ago - Due 04/04/2023; Effective 04/01/2023
- Complete State and Local Withholding Elections  
1 minute(s) ago - Due 06/01/2023; Effective 04/01/2023
- Complete Federal Withholding Elections  
1 minute(s) ago - Due 06/01/2023; Effective 04/01/2023
- Payment Election Enrollment Event  
1 minute(s) ago - Due 06/01/2023
- Change Emergency Contacts  
1 minute(s) ago - Due 06/01/2023

3. Click the links to review the documents. Check the **I Agree** box for each document after reviewing.

### Review Documents

Review Documents for Onboarding for Sam Houston

1 minute(s) ago - Effective 04/01/2023

#### Documents

- Document: [Mobile County Bereavement Leave Policy](#)  
Signature Statement: Please download this document and acknowledge that you have received it by checking the checkbox below  
I Agree:
- Document: [Infectious Disease Policy](#)  
Signature Statement: Please download this document and acknowledge that you have received it by checking the checkbox below  
I Agree:
- Document: [Covid-19 Isolation and Quarantine Guidelines](#)  
Signature Statement: Please download this document and acknowledge that you have received it by checking the checkbox below  
I Agree:
- Document: [Mobile County Administration Internet Usage Policy](#)  
Signature Statement: Please download this document and acknowledge that you have received it by checking the checkbox below  
I Agree:
- Document: [Mobile County Internet and Email Usage Policy](#)  
Signature Statement: Please download this document and acknowledge that you have received it by checking the checkbox below  
I Agree:

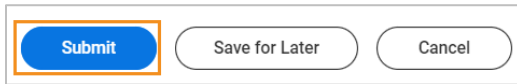
Comment:



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4. Click **Submit**.

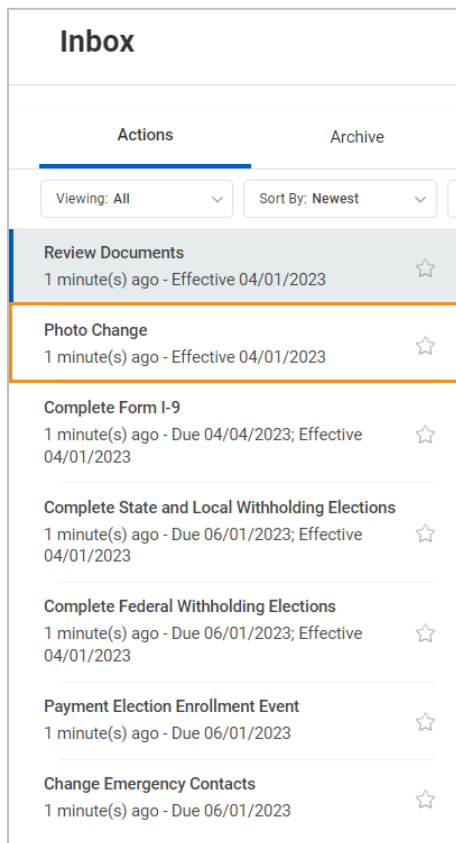


## Photo Change

1. From the Workday homepage, click the **Inbox** icon.



2. Click the update task from the Inbox **Actions** tab que to **Photo Change**.







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3. Drop or select your picture file in the **Attachments** section. Click **Submit**.

## Complete Form I-9

1. From the Workday homepage, click the **Inbox** icon.



2. Click the update task from the Inbox **Actions** tab que to **Complete I-9**.



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3. Complete and verify the information in the required fields that are indicated by a red asterisk.

### Complete Form I-9

1 minute(s) ago - Due 04/04/2023; Effective 04/01/2023

#### Employment Eligibility Verification

Department of Homeland Security, U.S. Citizenship and Immigration Services

USCIS Form I-9

OMB No. 1615-0047  
Expires 10/31/2022

>START HERE Download and read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

[Form I-9 Instructions.](#)

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers CANNOT specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

#### Section 1. Employee Information and Attestation

Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.

Last Name (Family Name) \*

First Name (Given Name) \*  Middle Initial

Other Last Names Used (if any)

Address (Street Number and Name) \*

Apt. Number  City or Town \*

State \*  ZIP Code \*

Date of Birth \*   U.S. Social Security Number

Employee's E-mail Address

Employee's Telephone Number

4. Scrolling down, select a citizenship status. You may be prompted to add a document number if you choose #2, 3, or 4.  
Review the *Signature of Employee* section, click the **I Agree** box.



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I attest, under penalty of perjury, that I am (check one of the following boxes):

- 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)

Aliens authorized to work must provide only one of the following document numbers to complete Form I-9: An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.

1. Alien Registration Number/USCIS Number:

OR

2. Form I-94 Admission Number:

OR

3. Foreign Passport Number:

Country of Issuance:  (empty)

### Signature of Employee

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

By checking the I Agree check box, I acknowledge that I have read the attestation statement above and am electronically signing this Form I-9.

I Agree \*

## 5. Scrolling down, complete the following if you used a Preparer and/or Translator.

### Preparer and/or Translator Certification (check one):

- I did not use a preparer or translator.
- A preparer(s) and/or translator(s) assisted the employee in completing Section 1.

How Many?

Fields below must be completed and signed when preparers and/or translators assist an employee in completing Section 1.

### Signature of Preparer or Translator

I attest, under penalty of perjury, that I have assisted in the completion of Section 1 of this form and that to the best of my knowledge the information is true and correct.

I Agree

Last Name (Family Name)

First Name (Given Name)

Address (Street Number and Name)

City or Town  State

ZIP Code

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6. Click **Submit**.

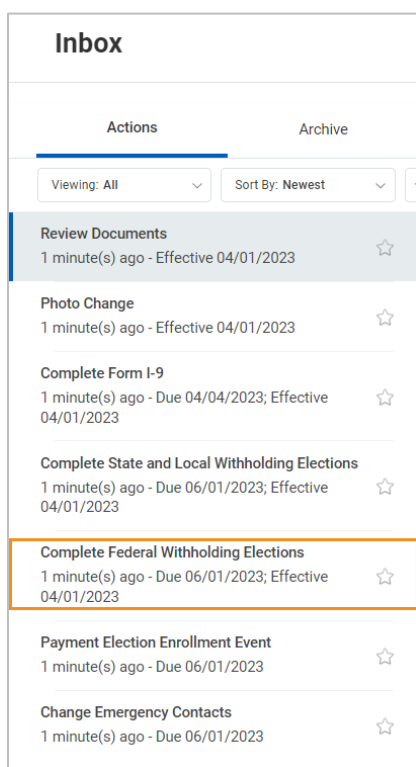


## Complete Federal Withholding Elections

1. From the Workday homepage, click the **Inbox** icon.



2. Click the update task from the Inbox **Actions** tab que to **Complete Federal Withholding Elections**.





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## Audience: Employees

3. Complete the *Federal Withholdings Election, W-4 Data* section. Scrolling down, complete the Step 4, *Other Adjustments*, if applicable.

**Complete Federal Withholding Elections**

1 minute(s) ago - Due 06/01/2023; Effective 04/01/2023

Company: MCC Mobile County Commission  
Effective Date: 05/30/2023  
Name: Sam Houston  
Social Security Number: (empty)  
Address: 205 Government Street, Mobile, AL 36644, United States of America

**W-4 Data**

[View Blank Form](#)

Step 1:  
Marital Status \*

Complete Steps 2-4 ONLY if they apply. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at [www.irs.gov/W4App](http://www.irs.gov/W4App), and privacy.

Step 2:  
Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do only one of the following:  
(a) Reserved for future use  
(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below; or  
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is generally more accurate than (b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, (b) is more accurate.

TIP: If you have self-employment income, see page 2.

Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)

Step 3:  
Claim Dependents

If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Number of Qualifying Children Under Age 17	<input type="text" value="0"/>
Total Amount for Qualifying Children	0.00
Number of Other Dependents	<input type="text" value="0"/>
Total Amount for Other Dependents	0.00
Calculated Total Dependent Amount	0.00
Override Total Dependent Amount	<input type="text" value="0.00"/>

Step 4 (optional):  
Other Adjustments

Other income (not from jobs): If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income.

(a) Other Income (not from jobs)

Deductions: If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here.

(b) Deductions

Extra Withholding: Enter any additional tax you want withheld each pay period.

(c) Extra Withholding

Exempt: You had no federal income tax liability in 2022 and you expect to have no federal income tax in 2023. Note: By checking the Exempt box you will have no federal taxes withheld.

Exempt

Nonresident Alien: If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Nonresident Alien

4. Review the *Legal Notice* and click the **I Agree** box.

Step 5:

**Legal Notice**

Your Name and Password are considered as your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are certifying that:

1. Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.
2. You understand that your payroll tax withholding election is a legal and binding transaction.
3. You understand that all submissions are contingent upon acceptance by your Payroll representative.

If you do not wish to use the electronic signature option, print a paper copy of the form. The form is not valid without a signature.

I Agree

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5. Click **Submit**.

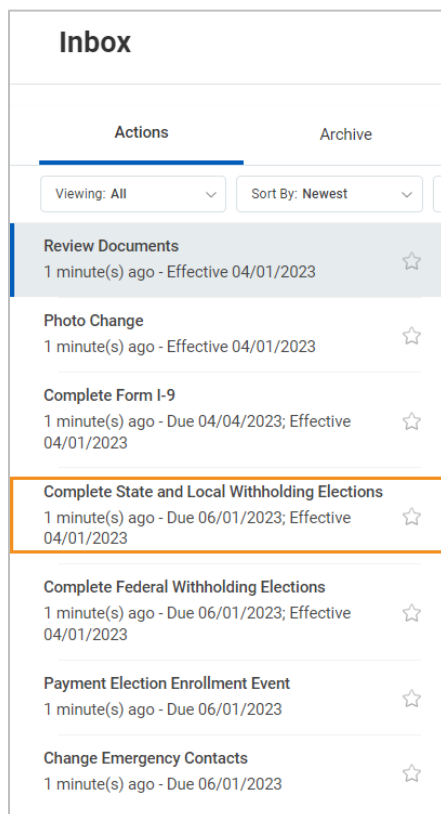


## Complete State and Local Withholding Elections

1. From the Workday homepage, click the **Inbox** icon.



2. Click the update task from the Inbox **Actions** tab que to **Complete State and Local Withholding Elections**.





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3. Confirm **State** and **Withholding Form Type**, click **OK**.

### Complete State and Local Withholding Elections

1 minute(s) ago - Due 06/01/2023; Effective 04/01/2023

Worker: Sam Houston

Company: MCC Mobile County Commission

Effective Date: 05/30/2023

State: \* Alabama

Withholding Form Type: \* A4 - Withholding

**OK** Cancel

4. Complete State and Local Withholding Elections in the **Alabama A4 Data** section.

### Complete State and Local Withholding Elections

Company: MCC Mobile County Commission

Effective Date: 03/30/2023

Name: Alaina SATA

State: Alabama

Social Security Number: XXX-XX-XXXX

Address: 123 Main St, Mobile, AL 36644, United States of America

#### Alabama A4 Data

View Blank Form

Personal Exemptions: \*

Number of Dependents: 0

Additional Amount: 0.00

5. Review the Legal Notice at the bottom of the form and if you agree, click the **I Agree** box.

#### LEGAL NOTICE

Your Name and Password are considered as your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are certifying that:

1. Under penalties of perjury, you declare that you have examined this certificate and to the best of your knowledge and belief, it is true, correct, and complete.
2. You understand that your payroll tax withholding election is a legal and binding transaction.
3. You understand that all submissions are contingent upon acceptance by your Payroll representative.

If you do not wish to use the electronic signature option, please contact your Payroll Department for a paper copy of the form. The form is not valid without a signature.

Under penalties of perjury, I certify that I have examined this certificate and to the best of my knowledge and belief, it is true, correct and complete.

I Agree



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6. Click **OK**.

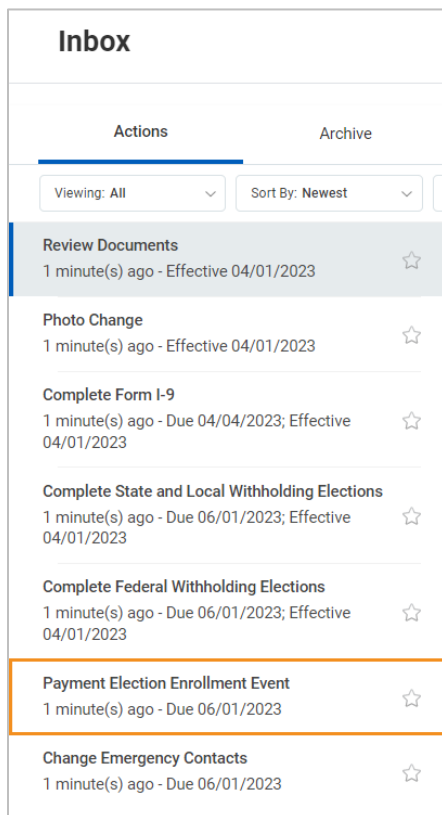


## Payment Election Enrollment Event

1. From the Workday homepage, click the **Inbox** icon.



2. Click the update task from the Inbox **Actions** tab que to **Payment Election Enrollment Event**.







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3. Add the required **Preferred Payment Method** and **Account Information**.

### Manage Payment Elections

1 minute(s) ago - Due 06/01/2023

Person Sam Houston  
Default Country United States of America  
Default Currency USD

#### Preferred Payment Method

Expenses \*

Payroll \*

Expense Payroll \*

#### Account Setup

Account Holder Name Sam Houston

Sample Check

Jonathan Doe  
4321 Main St.  
Anywhere, CA 94000

DATE \_\_\_\_\_

\_\_\_\_\_ Dollars

YOUR BANK NAME  
9876 1st St.  
Anywhere, CA 94000

DO NOT INCLUDE  
Check # \_\_\_\_\_

⑆ 123456789 ⑆ 0001234567890 ⑆ 99123

9 Digit Routing #  
Between the ⑆ symbols

Account #  
Include all zeros

#### Account Information

Account Nickname (optional)

Routing Transit Number \*

Bank Name \*

Bank Identification Code

Account Type \*  Checking  Savings

Account Number \*

4. Click **OK**.



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5. The Account has been added and the Payment Elections have been updated. Use the options to **Edit**, **Remove** or **View** account, as needed. To add an additional account, click the **Add** button.

**Payment Elections** [Menu] [PDF]

Select how to receive payment for each type of pay. For direct deposit, be sure to add bank accounts before payment elections.

**Person**

Default Country United States of America

Default Currency USD

Status Successfully Completed

Last Updated 04/13/2023 12:04 PM

Accounts 1 item [Grid] [List] [Filter] [Refresh] [PDF]

Account Nickname	Country	Bank Name	Account Type	Account Number	
Example Bank *****7890	United States of America	Example Bank	Checking	*****7890	<div style="border: 1px solid orange; padding: 2px; display: inline-block; text-align: center;">Edit Remove View</div>

Add

Payment Elections 3 items [Grid] [List] [Filter] [Refresh] [PDF]

Pay Type	Payment Type	Account	Account Number	Distribution	
Expenses	Direct Deposit	Example Bank *****7890	*****7890	Balance Yes	<div style="border: 1px solid orange; padding: 2px; display: inline-block; text-align: center;">Edit</div>
Payroll	Direct Deposit	Example Bank *****7890	*****7890	Balance Yes	<div style="border: 1px solid orange; padding: 2px; display: inline-block; text-align: center;">Edit</div>
Expense Payroll	Direct Deposit	Example Bank *****7890	*****7890	Balance Yes	<div style="border: 1px solid orange; padding: 2px; display: inline-block; text-align: center;">Edit</div>

6. Follow Step 5 above, to add any additional account's information and click **OK**. Multiple accounts are listed.

Accounts 2 items

Account Nickname	Country	Bank Name	Account Type	Account Number	
Example Bank *****7890	United States of America	Example Bank	Checking	*****7890	<div style="border: 1px solid orange; padding: 2px; display: inline-block; text-align: center;">Edit Remove View</div>
Example2 Bank *****7890	United States of America	Example2 Bank	Savings	*****7890	<div style="border: 1px solid orange; padding: 2px; display: inline-block; text-align: center;">Edit Remove View</div>



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7. Update your elections by selecting **Edit**.

Payment Elections 3 Items					
Payment Elections					
Pay Type	Payment Type	Account	Account Number	Distribution	
Expenses	Direct Deposit	Example Bank *****7890	*****7890	Balance Yes	<input type="button" value="Edit"/>
Payroll	Direct Deposit	Example Bank *****7890	*****7890	Balance Yes	<input type="button" value="Edit"/>
Expense Payroll	Direct Deposit	Example Bank *****7890	*****7890	Balance Yes	<input type="button" value="Edit"/>

8. In this example, the **Payroll** Payment Election will be updated. Select the **+** sign to add a row.

### Payment Election

Designate how to receive payments. For direct deposit you must first set up accounts on the previous page. If an account is not available, return to the summary page and add it to the list of valid accounts. If multiple elections are allowed, designate the order and distribution of payments. To submit a valid payment election, the last election specified must have a distribution type of balance to capture the remaining amount, or the percentages must add up to 100 percent.

Pay Type

Person

Default Country

Default Currency

Number of Elections Allowed

Payment Elections 1 Item						
+ -	Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
<input type="button" value="+"/>		<input type="text" value="x United States of America"/>	<input type="text" value="x USD"/>	<input type="text" value="x Direct Deposit"/>	<input type="text" value="x Example Bank *****7890"/>	<input checked="" type="radio"/> Balance <input type="radio"/> Amount <input type="text" value="0.00"/> <input type="radio"/> Percent <input type="text" value="0"/>

9. Select **Country**, the **Currency** will default to **USD**, and add the **Payment Type** and **Account**.

Payment Elections 2 items						
+ -	Order	*Country	*Currency	*Payment Type	Account	
<input type="button" value="+"/>		<input type="text" value="x United States of America"/>	<input type="text" value="x USD"/>	<input type="text" value="x Direct Deposit"/>	<input type="text" value="x Example2 Bank *****7890"/>	



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10. Next, add how to split the total, by **Amount** or **Percent**.

For this example, \$100 will go to *Example Bank* account and the balance will go to *Example2 Bank* account.

Account	*Balance / Amount / Percent
<input type="checkbox"/> Example Bank *****7890	<input type="radio"/> Balance <input checked="" type="radio"/> Amount <input type="text" value="100.00"/> <input type="radio"/> Percent <input type="text" value="0"/>
<input checked="" type="checkbox"/> Example2 Bank *****7890	<input checked="" type="radio"/> Balance <input type="radio"/> Amount <input type="text" value="0.00"/> <input type="radio"/> Percent <input type="text" value="0"/>

11. Click **OK**.

<input checked="" type="button" value="OK"/>	<input type="button" value="Cancel"/>
--	---------------------------------------

## Change Emergency Contacts

1. From the Workday homepage, click the **Inbox** icon.



2. Click the update task from the Inbox **Actions** tab que to **Change Emergency Contacts**.

# Onboarding Audience: Employees



**Inbox**

Actions      Archive

Viewing: All      Sort By: Newest

- Review Documents  
1 minute(s) ago - Effective 04/01/2023
- Photo Change  
1 minute(s) ago - Effective 04/01/2023
- Complete Form I-9  
1 minute(s) ago - Due 04/04/2023; Effective 04/01/2023
- Complete State and Local Withholding Elections  
1 minute(s) ago - Due 06/01/2023; Effective 04/01/2023
- Complete Federal Withholding Elections  
1 minute(s) ago - Due 06/01/2023; Effective 04/01/2023
- Payment Election Enrollment Event  
1 minute(s) ago - Due 06/01/2023
- Change Emergency Contacts**  
1 minute(s) ago - Due 06/01/2023


3. Click the **pencil** icons to update the **Legal Name** and **Relationship** of your emergency contact. To include a Primary Phone, click the **Add** button.

**Change Emergency Contacts**      Sam Houston      ☆      📄      ⚙️      🗑️


1 minute(s) ago - Due 06/01/2023

**Primary Emergency Contact**

**Legal Name**

Legal Name \*  

**Relationship**

Relationship \*  

**Primary Address**

**Primary Phone**

**Additional Phone**

**Primary Email**

**Additional Email**

**Alternate Emergency Contacts**



Alternate Emergency Contacts



## Onboarding Audience: Employees


4. Enter the **First** and **Last Name** of your emergency contact. Click the **check mark** to save.

Legal Name


Name  

(empty)

Country \*

Search 


× United States of America

Prefix 

First Name \*



Middle Name


Last Name \*

Suffix 

5. Choose the **Relationship** to your emergency contact. Click the **check mark** to save.

Relationship \*

Search 

Spouse

Child

Nephew

Niece

Grandchild

Ex-Spouse

Grandparent

Sibling

Parent

Aunt

Uncle

Friend

Other



## Onboarding Audience: Employees

6. After clicking on the *Primary Phone* **Add** button, enter the required information.  
Click the **check mark** to save.

Phone ↶ ✓  
(empty)

Phone Device \*

Country Phone Code \*

Phone Number \*

Phone Extension

Type \*

7. Click Submit.