NEW HIRE ONBOARDING

WORKDAY USER GUIDE

Welcome to BMC Health System! Prior to your first day on October 1, you will need to log in to Workday and begin your onboarding process.

The purpose of this guide is to introduce you to Workday and assist you in learning how to navigate the interface to complete important work-related tasks. Workday enables you to manage your personal work information all in one place. As a new BMC Health System employee, Workday is where you will complete your hew hire and Onboarding tasks, as well as enroll in your benefits (if eligible).

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ACCESSING YOUR CREDENTIALS

To begin your onboarding you will need to log in to Workday. Begin by following the instructions below. After gaining access to your BMC Health System credentials, the rest of the onboarding tasks should take about 20 minutes to complete.

1 You will receive your new BMC email address and instructions for set up, via email to your Steward email address. Instructions will include set up for password and a multi-factor authentication that will allow you confidential access the BMC Health System network.

- You should not access your BMC email until your first day at BMC Health System. However, you are able to access Workday using your BMC email address as your log-in. All of the onboarding steps detailed below take place through Workday.

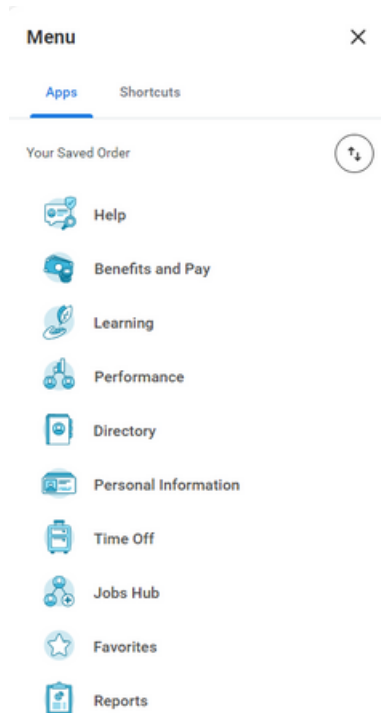**2** Go to https://www.myworkday.com/bmc to access Workday. click on the Workday link. Enter your BMC email address and your temporary password. The system will immediately ask you to create new password. Remember this password as it will be your password that will be used to access all BMCHS systems.

Log into Workday with your BMC email and password

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WORKDAY TERMS & SYMBOLS

Workday Home Page: The main landing page of Workday that houses any announcements, recent tasks, and your top apps.

Notifications: 🔔 Located in the top right corner of any Workday screen, this is where you see notification of any new messages or tasks that have been assigned to you.

Task: 📥 This icon looks like an inbox, and it means that a task has been assigned to you to complete.

Prompt: ☰ This icon looks like a tiny bulleted list. You can click this button to expand it, and it will give you a list of options.

Plus: ⊕ You can use this symbol to add more row items, such as adding multiple dependents or beneficiaries.

Minus: ⊖ Use this symbol to delete row items such as deleting beneficiaries.

Edit: ✏ The pencil allows you to make edits to the assigned field.

Applications: The Menu box at the top left corner of your Workday homepage will allow you to view your applications, as shown below.

Menu ✕

Apps   Shortcuts

Your Saved Order   ⇅

Help

Benefits and Pay

Learning

Performance

Directory

Personal Information

Time Off

Jobs Hub

Favorites

Reports

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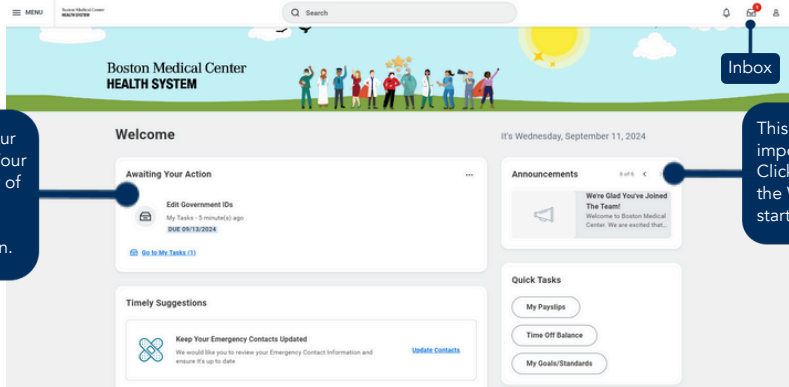**HEALTH SYSTEM**

WORKDAY ONBOARDING CHECKLIST

The Onboarding Checklist below will assist you through the onboarding tasks found in your Workday inbox.

Please reference the rest of the Workday Onboarding guide to assist you in navigating through your new hire paperwork online.

- **Access your Workday self-service web portal:** Follow the instructions in the onboarding email you received to your Steward email address from getstarted@bmc.org.
- **Read Offer/Welcome letter:** Please read and acknowledge/sign your offer/welcome letter
- **Personal Information:** Confirm and enter Personal Information and Contact Change
- **Social Security Number:** Enter your SSN in the Edit Government ID's section. Non-U.S residents must also complete the Additional Government IDs row
- **Change Emergency Contacts:** At least one emergency contact and one form of contact must be provided
- **Complete Form I-9:** Section one and two of the I-9 Form must be completed online no later than the third day of employment. We encourage you to complete the form prior to your start date
  - *I-9 Identification Section Two: You will need to provide work authorization documents to HR
- **Federal Withholding Elections (W-4):** Complete in Workday
- **State/Local Withholding Elections:** Complete in Workday
- **Manage Payment Elections Enrollment (Direct Deposit & Check):** Direct Deposit will require bank information
- **Disability Self-Identification:** Complete as appropriate
- **Veteran Status Identification:** Complete as appropriate
- **Policies Complete:** Complete in Workday
- **Benefits Elections:** You have a 30-days from your official start date to select your benefits
- **Criminal Record Check (CORI):** You will receive a separate email from DISA (noreply@clairiti.com) to complete the state-required name-based CORI form. Please complete and submit the requested information as soon as possible as it is important for continued employment
- **Employment Medical Clearance:** Medical clearance will be required within 90 days, and employee health records will be reviewed as part of this process. More information will be provided after 10/1

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COMPLETE ONBOARDING TASKS

Before you may begin working, you must complete several onboarding tasks in Workday to get you set up in the system. The steps below will help you through the onboarding process the first time you access Workday.
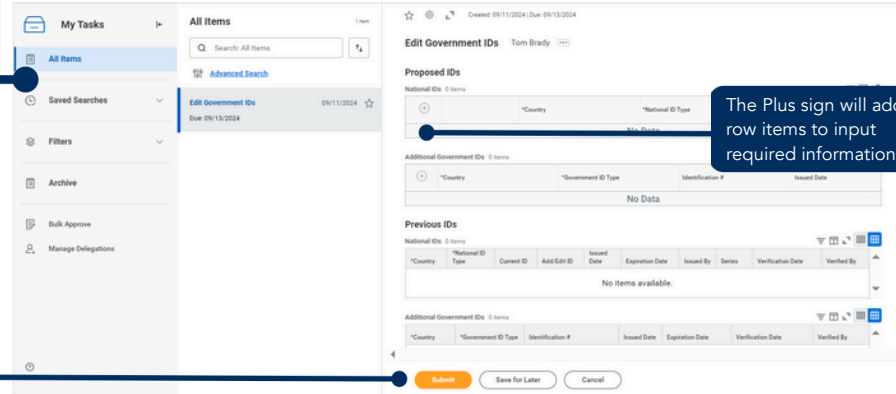

This is where you will find all of your messages and task notifications. Your Tasks are accessible on the center of your Workday dashboard or by clicking the Inbox icon on the top right corner of any Workday screen.

Inbox

This is where you'll see important announcements. Click through until you see the Welcome message to get started on your Onboarding.

Select the Inbox icon in the top right corner of your screen to access your onboarding tasks. Begin by reviewing and acknowledging your offer letter. After acknowledging the offer letter, additional onboarding tasks will appear. You will complete one task at a time until your inbox is empty.

Your Onboarding Tasks will appear on the left side of the screen. When you complete the first two tasks, you will be prompted to complete additional tasks.

The Plus sign will add row items to input required information.

As you complete Onboarding Tasks be sure to click Submit and Done when finished. The task will not be processed if Submit and Done are not selected.
If you miss a field you will not be allowed to move forward or cause a delay in the hiring process.

Always scroll down to the bottom of the window to avoid missing information.

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COMPLETE ONBOARDING TASKS

Follow the instructions for submitting each of the forms listed in your inbox. Once the step you are working on has been filled out completely and correctly click Submit to be directed to the next onboarding step.

On the Edit Government IDs page, click the plus (+) in the box under National IDs to get started. Enter your social security number. Please verify that it is correct. You do not need to enter the issue or expiration date for your social security number. When done, click the plus (+) in the box under Additional Government IDs. Enter the ID number, issue date and expiration date from your identification as shown in List A or List B on the List of Acceptable Documents page. Once this form is complete, click submit, then click refresh to show the rest of the onboarding steps.

- If you are entering a US Passport, Driver's license, or State ID card please enter that information in Additional Government IDs under the selection Government issued ID card with photograph or information.
- You do not need to upload any documents into Workday during this process.

You may click on Archive to review items completed.

As you complete Onboarding Tasks, the number in your inbox will decrease.

REVIEW ONBOARDING DOCUMENTS

In the Review Documents section, you will be asked to download and review various policy documents. You must read through each policy and select the I Agree box in Workday to confirm that you have reviewed and will comply with each policy.

After downloading and reviewing each document, read each Signature Statement and select the I Agree checkbox to continue.

Submit each task until your inbox is empty before logging out.

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ENTERING YOUR DIRECT DEPOSIT INFORMATION

Entering Your Direct Deposit Information

Open Your Payment Elections

On your Workday profile, select the **Menu** in the top left corner.

Select **Benefits and Pay** from the Apps list.
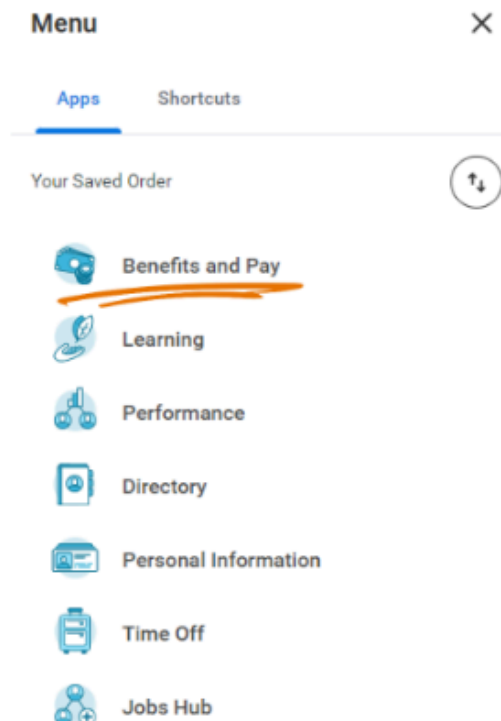
ENTERING YOUR DIRECT DEPOSIT INFORMATION

This will take you to the **Overview** section, which highlights your **Most Recent Pay** and **Current Benefit Costs**.
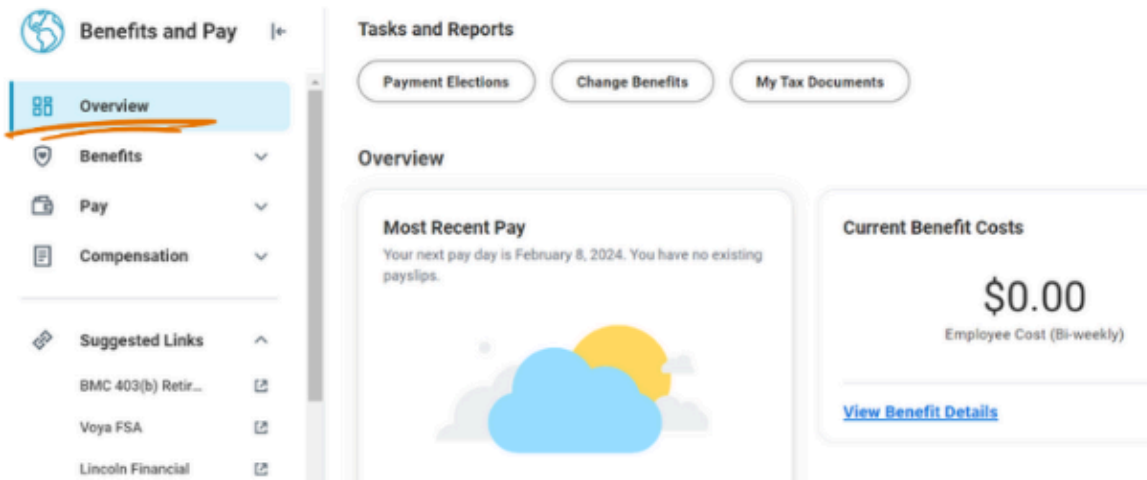
PRO TIP: *The Overview section also provides quick access to commonly used Tasks and Reports, including Payment Elections, Change Benefits and My Tax Documents.*

From this page, click on **Payment Elections** (directly below the **Tasks and Reports** section).

ENTERING YOUR DIRECT DEPOSIT INFORMATION

Add Your Account Information

From your **Payment Elections** page, select **Add**. You can also **Edit** your elections or **Remove** a bank account from this page.

Payment Elections

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

Person

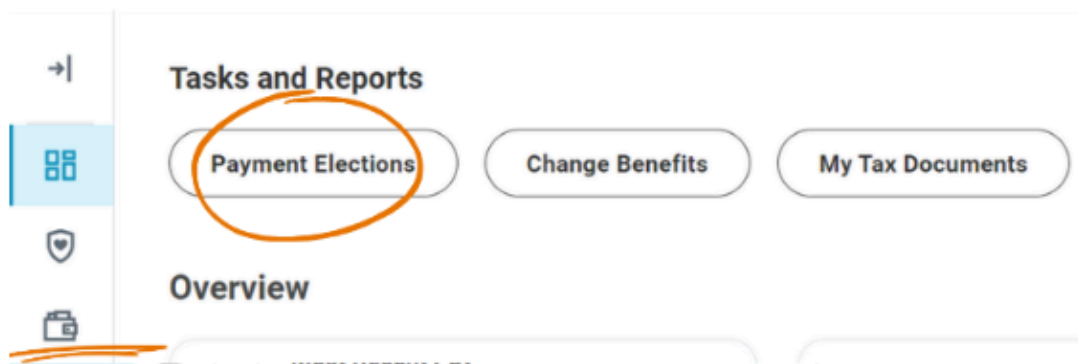|	
Default Country	United States of America
Default Currency	USD
Status	Successfully Completed
Last Updated	08/30/2023 04:30 PM

Accounts 1 item

Account Nickname	Country	Bank Name	Account Type	Account Number	Action
DailyPay ******	United States of America	DailyPay	Checking	******	Edit / Remove / View

Add

Payment Elections 1 item

Pay Type	Payment Type	Account	Account Number	Distribution	Action
Regular Payments	Direct Deposit	DailyPay ******9940	******	Balance Yes	Edit

Enter your information. Red stars indicate required information. Once you've entered all necessary items, select **OK**.

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ENTERING YOUR DIRECT DEPOSIT INFORMATION

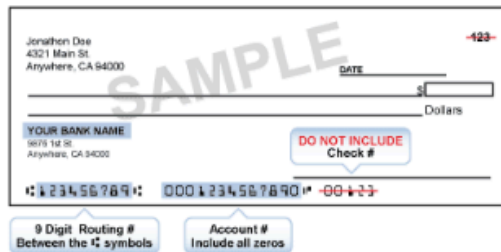## Add Account

Add account information to use when you specify payment elections.

Account Holder Name

Account Country   United States of America

Sample Check

Account Information

Account Type	*	● Checking
		○ Savings
Routing Transit Number	*	[ ]
Account Number	*	[ ]
Bank Name	*	[ ]
Bank Identification Code		[ ]
Account Nickname (optional)		[ ]

After submitting your information, your bank account will appear on the **Payment Elections** page of your Workday profile. You can see additional details by selecting **View** in the **Action** column of the **Accounts** section.

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ENTERING YOUR DIRECT DEPOSIT INFORMATION

Edit Your Payment Elections

On the **Payment Elections** section (below the **Accounts** section) of the **Payment Elections**, select **Edit**.

- Click the **Plus Sign** button at the top left corner of the **Payment Elections** section.

- For **Country**, select **United States of America** from the drop-down menu. For **Payment Type**, select **Direct Deposit** from the drop-down menu.

- The **Account** field will become visible once you've selected **Direct Deposit**. Select the intended account from the list.

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ENTERING YOUR DIRECT DEPOSIT INFORMATION

If you entered only one account into Workday:

Check off **Balance** and then select **OK**. Review your information on the **Payment Elections** page to confirm all is correct. Once completed, you will receive a pop-up message confirming that your direct deposit has been set up successfully.

If you entered multiple accounts into Workday:

After selecting **Edit** in the **Payment Elections** section of the **Payment Elections** page, go to the **Balance / Amount / Percent** column and enter the amount that you would like deposited into each account.

Select **Balance** for the last account listed. ***One account <u>must</u> have the Balance option selected in order for your direct deposit setting to be saved.***

PRO TIP: You can reorder your accounts by clicking the up and down arrows next to the Country column.

Select **OK** at the bottom of the page.

OK

FORM I-9 INSTRUCTIONS

Please follow the instructions below to complete the Form I-9 requirement to present acceptable document(s) at the Welcome Fair.

WORKDAY

- Electronic Form I-9: This form will appear in your Workday in-box once you have updated your personal information in Workday. Complete Section 1 as instructed.

PHYSICAL INSPECTION OF DOCUMENTS

For Hospital employees: Please bring your identification documentation for your I-9 completion to one of the Welcome Fairs. You must bring your identification documents with you even if you have already completed your Workday Onboarding.

For Physicians and Residents: Please schedule an onboarding appointment by reaching out to SEMC_HRSupport@bmc.org or GSMC_HRSupport@bmc.org. You will need to show the documents via zoom or attend one of the Welcome Fairs.

All documents presented must be unexpired, and must be the physical document and not a copy or scanned version.

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LISTS OF ACCEPTABLE DOCUMENTS
All documents must be UNEXPIRED

Employees may present one selection from List A
or a combination of one selection from List B and one selection from List C.

LIST A		LIST B		LIST C
Documents that Establish Both Identity and Employment Authorization	OR	**Documents that Establish Identity**	AND	**Documents that Establish Employment Authorization**

LIST A — Documents that Establish Both Identity and Employment Authorization

1. U.S. Passport or U.S. Passport Card
2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)
3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa
4. Employment Authorization Document that contains a photograph (Form I-766)
5. For a nonimmigrant alien authorized to work for a specific employer because of his or her status:
   a. Foreign passport; and
   b. Form I-94 or Form I-94A that has the following:
      (1) The same name as the passport; and
      (2) An endorsement of the alien's nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form.
6. Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI

LIST B — Documents that Establish Identity

1. Driver's license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address
2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address
3. School ID card with a photograph
4. Voter's registration card
5. U.S. Military card or draft record
6. Military dependent's ID card
7. U.S. Coast Guard Merchant Mariner Card
8. Native American tribal document
9. Driver's license issued by a Canadian government authority

For persons under age 18 who are unable to present a document listed above:

10. School record or report card
11. Clinic, doctor, or hospital record
12. Day-care or nursery school record

LIST C — Documents that Establish Employment Authorization

1. A Social Security Account Number card, unless the card includes one of the following restrictions:
   (1) NOT VALID FOR EMPLOYMENT
   (2) VALID FOR WORK ONLY WITH INS AUTHORIZATION
   (3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION
2. Certification of report of birth issued by the Department of State (Forms DS-1350, FS-545, FS-240)
3. Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal
4. Native American tribal document
5. U.S. Citizen ID Card (Form I-197)
6. Identification Card for Use of Resident Citizen in the United States (Form I-179)
7. Employment authorization document issued by the Department of Homeland Security

Examples of many of these documents appear in the Handbook for Employers (M-274).

Refer to the instructions for more information about acceptable receipts.