

# Day One 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](https://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.
  - Due to the sensitive nature of your personal information in Workday, you will be requested to set up additional forms of authentication when you login to Workday.
  - You will automatically be logged into Workday after clicking the app.



## Multi-Factor Authentication (MFA) Setup

- If you have not previously set up MFA, 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.



## 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. Many of the items listed in this checklist will be in your Workday inbox to review and make any needed edits.

*Check your Workday Inbox for quick access to many of these tasks!*



## Record Your Time Worked

- Starting on July 6, if you are an hourly or non-exempt employee, you will need to begin recording your time worked in Workday. [Enter time worked from July 1-5 as soon as you log into Workday.](#)
- Enter hours worked** by clicking the **Time** app on your home page.



## 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.**

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## 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! Beneficiaries will not transfer over. [Page three of this quick reference guide](#) details this process.*



## Review Your Payment and Tax Document Options

- View your payment elections and tax information** by clicking the **Pay** app on your home page.
- Add or edit a direct deposit account** and **manage payment elections** by navigating to your [Worker Profile](#), clicking the **Pay** tab, then clicking the **Payment Elections** subtab. *Note:* direct deposit accounts can only be added or edited on a campus internet network or VPN.
- Beginning at the end of July, you can **view or print payslips** by clicking [View > Payslips](#).
- View or edit withholding elections** by clicking [Actions > Withholding Elections](#). Navigate to Federal Elections and/or State Elections and click the Update button at the bottom to change.



## ON/AFTER JULY 10: Review Your Time Off Balances & Request Future Absences

- Request absences and review balances** by clicking the **Absence** app on your home page.
- View time off** balances by clicking [View > My Absence](#).
  - Let your Manager know if this information is incorrect.
  - On July 6, your time off and leave of absence requests will not be current. 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](#). Future time offs will not transfer from your legacy system. *Please wait until balances are updated on July 10 to request absences to prevent a negative balance/leave without pay. Holiday time off will need to be requested in Workday. If you took July 5 as a holiday, request an absence for this day and select the type as University Holiday.*



## MANAGERS ONLY: Review 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 team if your direct reports listed are incorrect.