

Onboarding Tasks Checklist



These items will route to you after you have completed the above steps and may take a few days to generate. All items are completed via Workday, our HRIS system.




Set Aside 30-45 Minutes

- Onboarding tasks must be completed within one sitting so be sure to set aside enough time to complete before logging into Workday.


Log into Workday & Change your Password

- Look for the following emails:
 - "Helpful Information..." – from TrinityHealth@myworkday.com
 - "Welcome!" – from TrinityHealth@myworkday.com
 - "Additional Information" with your Temporary Password – from TrinityHealth@myworkday.com
 - "Your Workday Account" with your Username – from TrinityIST@trinity-health.org
- Use the link, username, and temporary password provided in the above emails
 - You must COPY and PASTE the username and COPY and PASTE the temporary password
- Change your password as prompted.



Go to your Workday Inbox








- Click the inbox icon located on top right of Workday homepage 
 - Onboarding tasks will appear as separate inbox items on the left side of the page
 - Directions will appear on the right section of the page when task is clicked/opened
- Read the directions fully before proceeding through the inbox
- Many items require you click a blue link that brings you to a different page or site to complete the task
 - Must return to Workday and click "Submit" on the task to tell Workday you've completed the item
- Move through task by task by clicking an inbox item on the left sidebar or clicking the "Open" buttons that appear after submitting each task
- If you do not see a task listed below:
 - Click the refresh button on your browser or re-click the inbox icon so completed items are removed and new items populate in the inbox
- If you completed a task that is still showing in the inbox:
 - Be sure to click the "Submit" button at the bottom of the task in the right reading pane where the directions for the task are provided
- If you have any difficulty with logging in or completing the above tasks:
 - Please wait for Day 2 Orientation where an HR Representative will assist:

Workday Task: Complete Form I-9

- Click "Complete Form I-9" blue link to take you to the external I-9 site
 -  [Complete Form I-9](#)
 - Follow the direction to complete Part I of the I-9
- Return to Workday Inbox and click "Submit" on this task

Submit

<input type="checkbox"/>	Workday Task: Review and/or Update Contact Information
<ul style="list-style-type: none"> • Enter all required information (red asterisks) from the right panel of the webpage → You may enter additional information if desired • Click "Submit" on this task <p style="text-align: center;">Submit</p>	
<input type="checkbox"/>	Workday Task: Veteran Status Identification
<ul style="list-style-type: none"> • Choose Veteran Status by clicking the blue list icon → Select a veteran status <div data-bbox="380 726 602 787" style="border: 1px solid #ccc; padding: 2px; margin: 10px 0;"> <input type="text"/> ⌵ <div style="clear: both;"></div> X I AM NOT A VETERAN </div> <ul style="list-style-type: none"> • Click "Submit" on this task <p style="text-align: center;">Submit</p>	
<input type="checkbox"/>	Workday Task: Disability Self-Identification
<ul style="list-style-type: none"> • Choose Disability Status by clicking the blue list icon → Disability Status <div data-bbox="380 1064 602 1125" style="border: 1px solid #ccc; padding: 2px; margin: 10px 0;"> <input type="text"/> ⌵ </div> <ul style="list-style-type: none"> • Click "Submit" on this task <p style="text-align: center;">Submit</p>	
<input type="checkbox"/>	Workday Task: Conflict of Interest, Confidentiality and Network Access Documents
<ul style="list-style-type: none"> • Click on the blue links to read the documents <div style="display: flex; justify-content: space-around; margin-top: 5px;">  Conflict of Interest Disclosure-Trinity  Confidentiality And Network Access Agreement - Trinity </div> • Click "E-sign by Adobe Sign" button and follow the directions to sign <div style="margin-top: 10px;"> <p style="margin: 0;">E-sign by Adobe Sign</p> <p style="text-align: center;">E-sign by Adobe Sign</p> </div> • Return to the Workday inbox and click "Submit" on this task <p style="text-align: center;">Submit</p>	

<input type="checkbox"/>	Workday Task: Review New Hire Documents
	<ul style="list-style-type: none"> Click on the blue links to read the documents  Agreement to Notify Employer of Arraignment/Conviction-Trinity  Healthcare Reform Notice on Health Insurance Marketplace Coverage - Trinity Check the "I agree" box for each I Agree <input type="checkbox"/> Click "Submit" on this task 
<input type="checkbox"/>	Workday Task: Add Payment Elections
	<ul style="list-style-type: none"> If you do not see the Payment Elections task in your inbox, please refresh your browser or re-click the inbox icon on the top right of the page so your inbox is updated. Click "Add Payment Elections" button and follow directions  Click "Submit" on this task 
<input type="checkbox"/>	Workday Task: Update Tax Elections
	<ul style="list-style-type: none"> Click the "Update Withholding Elections" blue link to take you the tax elections site  Update Withholding Elections Complete required forms on this site and choose "Submit to Employer" for each (Federal, State, Local) Return to the Workday task and click "Submit" 
<input type="checkbox"/>	Workday Task: Benefit Change
	<ul style="list-style-type: none"> STOP here – you will learn more about benefits options during orientation and have 30 days to complete your elections → You must complete and submit in Workday within 30 days of hire to be enrolled in benefits.