

# System Guide: Workday Onboarding Tasks

Audience: New Faculty and Staff

***Welcome to CMU and Workday!***

## Introduction

The purpose of this system guide is to introduce you to Workday and walk you through accessing and completing the various Workday tasks and to-do steps required of newly hired faculty and staff.

- New faculty and staff are able to complete many of their onboarding tasks in Workday, CMU's cloud-based human capital management system.
- To get started, log in to Workday by following the steps outlined on page 2 below. You will need your Andrew ID and password as well as DUO two-factor authentication.
- If you are an individual with a disability and you require assistance with the onboarding process, please contact Equal Opportunity Services by emailing [employeeaccess@andrew.cmu.edu](mailto:employeeaccess@andrew.cmu.edu) or calling 412-268-3930.

## Onboarding Tasks in Workday

Once you've logged in, you will find the following required onboarding tasks in your Workday inbox:

- [Edit Government ID's \(U.S.-based new hires\)](#)
- [Employment Documents \(all new hires\)](#)
- [Update Legal and Preferred Name \(all new hires\)](#)
- [Update Home Contact Information \(all new hires\)](#)
- [Change Emergency Contacts \(all new hires\)](#)
- [Update Personal Information \(all new hires\)](#)
- [Disability Self-Identification \(U.S.-based new hires\)](#)
- [Veteran Status Identification \(U.S.-based new hires\)](#)
- [Wage Theft Prevention Act \(CA, D.C., and NY employees only\)](#)
- [Meal Break Waiver \(non-exempt CA employees only\)](#)

Once these tasks are complete, refresh your inbox and the following additional onboarding tasks will appear in your inbox:

- [Complete Form I-9 \(U.S.-based new hires\)](#)
- [Manage Payment Elections \(all new hires\)](#)
- [Update Tax Elections \(all new hires\)](#)

On your hire date (and the initial onboarding tasks are complete), the following additional task will appear in your inbox:

- [Benefits Elections \(benefits-eligible new hires\)](#)

One week after hire date (and the initial onboarding tasks are complete) if the information was not entered into the system as part of new hire data entry, the following additional tasks will appear in your inbox:

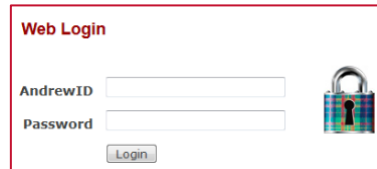
- [Update Work Phone Number \(all new hires\)](#)
- [Update Work Space \(all new hires\)](#)

## Log in to Workday

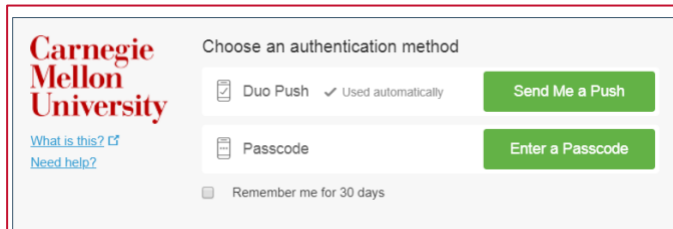
1. Select the **Workday Login** icon found on the HR Service website at <https://www.cmu.edu/hr/service-center/hr-systems.html>.



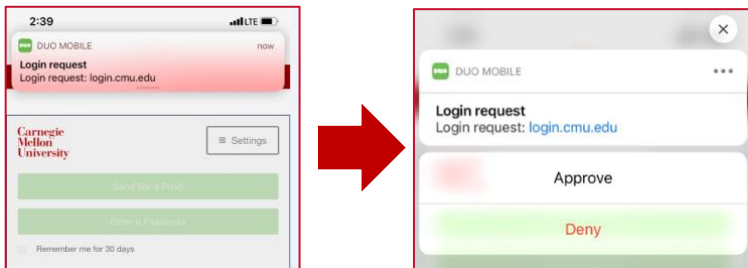
2. The Web Login page displays. Enter your Andrew ID and password and select **Login**.

The image shows the Web Login form. It has a title "Web Login" in red. Below it are two input fields: "AndrewID" and "Password". To the right of the "Password" field is a padlock icon. At the bottom is a "Login" button.

3. Complete DUO authentication – choose an option:

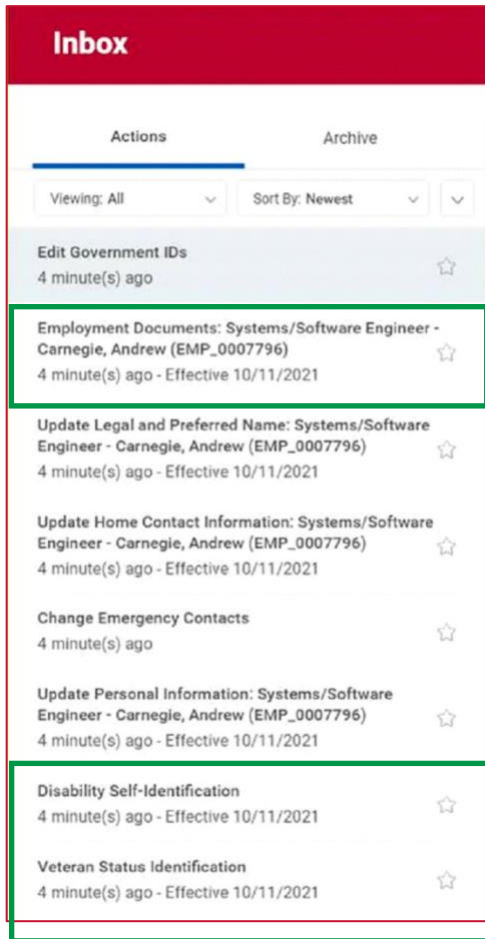
The image shows the DUO authentication screen. It has the Carnegie Mellon University logo on the left. The main heading is "Choose an authentication method". There are two options: "Duo Push" with a checkmark and "Used automatically", and "Passcode". Each option has a corresponding button: "Send Me a Push" and "Enter a Passcode". There is also a checkbox for "Remember me for 30 days".

- a. DUO Push (smartphone or tablet): click **Send Me a Push**
  - b. Passcode (one-time code via DUO mobile app or DUO hardware token): click **Enter a Passcode**
4. Use your device or hardware token to complete the authentication:



## Access Your Workday Inbox

1. From the **Workday** homepage, click the **Inbox** icon at the top right.



**Note:** Your initial onboarding tasks appear in your inbox. It is important that you complete all of the tasks in their entirety.

- If any of the initial tasks remain incomplete, the follow-up tasks will not trigger, including steps for completing your Form I-9 and making benefits, payment, and tax elections.
- Always click **Submit** when you are finished with a task.

**Employee Documents task:** Form requirements may vary based on the state in which you are located and your employee classification (i.e., faculty or staff).

**Disability Self-Identification and Veteran Status Identification tasks:** As a federal contractor, Carnegie Mellon University is required to obtain and report demographic data on its employees. These requirements are broadly governed by multiple federal agencies, including the Department of Labor and the Equal Employment Opportunity Commission, and they apply to all federal contractors. In compliance with federal law, throughout the onboarding process CMU may invite you to voluntarily self-identify your race, ethnicity, sex, disability, and veteran status. Note that you are not obligated to provide the above-mentioned information—you can choose “I do not wish to answer” in response to any of the status questions—but you are required to complete all of the onboarding tasks in your inbox.

- To refresh, click on the **Down** arrow after the Sort By field.

**Special note:** Some employees will be assigned a Journey in Workday that will provide more guidance and support navigating your first day and first weeks as an employee at CMU. This will appear in your My Task inbox to complete at your earliest convenience. Please complete as instructed.

## Edit Government IDs Task

This task is required for U.S.-based new hires and is used to capture and record your Social Security number.





1. In the National IDs section, click on the **Add** icon to enter your Social Security number.
2. Use the menu icon to select “United States of America” as the Country and “Social Security Number (SSN)” as the National ID Type, and then enter your Social Security number.
3. Click **Submit** to submit the task.

Edit icon:

Add icon:

Menu icon:

Submit button:



Note:

- The “Issued Date” and “Expiration Date” are not required fields.
- If you do not have an SSN yet, please still submit the task without entering any information. You can apply for an SSN and upload the information at a later date. If you have any questions or concerns, please contact [HR Employee Services](#).

Edit Government IDs

Frick, Henry Clay

Actions

1 day(s) ago

Proposed IDs

National IDs 0 items

	*Country	*National ID Type	Current ID	Add/Edit ID	Issued Date	Expiration Date	Issued
No Data							

Additional Government IDs 0 items

	*Country	*Government ID Type	Identification #	Issued Date	Expiration Date	Verification Date	Verified By
No Data							

Proposed IDs

National IDs
1 item

		*Country	*National ID Type	Current ID	Add/Edit ID	Issued Date	Expiration Date	Issued
+		<div> <div>×</div> United States of America </div>	<div> <div>×</div> Social Security Number (SSN) </div>		<div> 987-65-4321 </div>	<div> MM/DD/YYYY </div>	<div> MM/DD/YYYY </div>	

## Employment Documents Task

This task prompts new hires to review important documents related to employment at Carnegie Mellon University.

1. For each document included in the task, read the instructions related to the document.
2. Click on the document to open and review.
3. If acknowledgment is required, read the signature statement and check "I Agree."
4. Once you have reviewed all of the documents, click **Submit** to submit the task.



### Actions

2 day(s) ago - Effective 02/01/2021

### Workers' Compensation Acknowledgment

Please read the Workers' Compensation Acknowledgment and signify your acknowledgment by clicking the check box below. This form does not need to be populated, printed or signed.

I have read the above and understand my rights and responsibilities.

1

Faculty and Staff Retirement Plan Universal Availability Notice

Please read the Faculty and Staff Retirement Plan Universal Availability Notice and signify your acknowledgment by clicking the check box below.

I have reviewed the Faculty and Staff Retirement Plan Universal Availability Notice.

☐

## Intellectual Property Policy

As a faculty, staff and/or student of Carnegie Mellon University ("CMU"), you are subject to its Intellectual Property Policy (the "Policy"). The Policy can be accessed by clicking the Intellectual Property Link above. Among other things, the Policy describes the instances when CMU may own (and/or will have certain rights to) the intellectual property you create. The Policy requires you to sign any paperwork needed to confirm any ownership (or rights) in intellectual property that CMU may have under the Policy. This purpose of this document is to carry out the requirements of the Policy. Therefore, you agree: If the Policy allows CMU to own certain intellectual property you create (or have created), you hereby assign to CMU any and all ownership you have in such intellectual property, and if the Policy allows CMU to receive license rights to certain intellectual property you create (or have created), you hereby grant to CMU any and all such licenses.

By checking the 'I Agree' checkbox, you are agreeing to this legally-binding document for the benefit of CMU and certify that you are at least 18 years old.

**Submit**

For employees under the age of 18, this step is completed outside of Workday. HR Services will send a copy of the Intellectual Property Policy document via email with instructions for completion.

## Update Legal and Preferred Name Tasks

**Legal Name**

Legal Name

Legal Name \*

Frick, Henry Clay

**Preferred Name**


Preferred Name

Use Legal Name As Preferred Name

Yes

Preferred Name

Frick, Henry Clay



**Submit**

### Update Legal Name:

Review the legal name CMU has on file for you. If our information is inaccurate, please update your legal name in Workday.

### Update Preferred Name:

To enter a preferred name different from your legal name, uncheck “Use Legal Name as Preferred Name” and add your preferred name. Your preferred name is used in the CMU directory and for university-related communications.

Click **Submit** to submit the task.

### Note:

- Updating the country field changes the available name fields.

## Update Home Contact Information Task

1. Review the requirements provided for your primary and additional home contact information.
2. Use the **Add** button to add new information, or click on the **Edit** icon to correct existing information.
3. Click **Submit** to submit the task.

### Change Home Contact Information

#### Address

Add

#### Phone

Add

#### Email

Primary  
Yes



Email Address \*  
henry.clay.frick@gmail.com

Visibility  
Private

Add



Add

Submit

#### Note:

- Your primary, U.S.-based home address is used for tax purposes.
- A home telephone number is required. If you do not enter your home telephone number, you will receive an error message.
- All mailings from CMU or on behalf of CMU for payroll or benefits purposes will be sent to your primary home address.



## Change Emergency Contacts Task

**Primary Emergency Contact**

Legal Name

Legal Name \*

Relationship

Relationship \*

Preferred Language

Preferred Language

Primary Address

Add

Primary Phone

Add

Additional Phone

Add

Primary Email

Add

Additional Email

Add

Primary Instant Messenger

Add

Primary Web Address

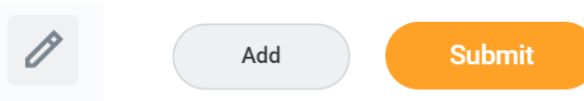
Add

1. Click on the **Edit icon** or the **Add button** in the Primary Emergency Contact section to update your primary emergency contact information.
2. Click on the **Add** button in the Alternate Emergency Contacts section to add alternate emergency contacts.
3. Click **Submit** to submit the task.

### Note:

- Please provide accurate and detailed emergency contact information to avoid delays in reaching your designated contact in case of emergency. Legal name, relationship, phone number, and email are required.
- CMU uses your emergency contact information only in emergency situations.
- Remember to update your emergency contacts in a timely manner if contact information changes.

Edit icon:      Add button:      Submit button:



**Alternate Emergency Contacts**

Alternate Emergency Contacts


Add

## Update Personal Information Task


1. Click on the **Edit** icon to edit your personal information.
2. Click **Submit** to submit the task.

**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 

Edit icon:



Submit button:

Submit

### Notes on Personal Information

- Invitation to self-identify: Note that you are not obligated to indicate your gender or race/ethnicity—you can choose “I do not wish to answer” in response to the Gender and Race/Ethnicity status questions.
- In the Citizenship Status field, select the option that reflects your citizenship as it relates to the United States.
  - Filter by Citizenship Status not By Country.
  - Non-U.S. citizens should also indicate their country of citizenship.
- All of the fields on this page are required except Marital Status.
  - Tasks submitted without required fields will be saved for later in your inbox.

## Disability Self-Identification Task (U.S.-based new hires)

1. Review the “Why you are being asked to complete this form?” and the “How do you know if you have a disability?” sections below.

2. Select one of the options in the “Please check one of the boxes below:” sections.
3. Click **Submit** to submit the task.

### Voluntary Self-Identification of Disability

Form

CC-305

OMB Control Number

1250-0005

Expires

04/30/2026

#### Why are you being asked to complete this form?

We are a federal contractor or subcontractor. The law requires us to provide equal employment opportunity to qualified people with disabilities. We have a goal of having at least 7% of our workers as people with disabilities. The law says we must measure our progress towards this goal. To do this, we must ask applicants and employees if they have a disability or have ever had one. People can become disabled, so we need to ask this question at least every five years.

Completing this form is voluntary, and we hope that you will choose to do so. Your answer is confidential. No one who makes hiring decisions will see it. Your decision to complete the form and your answer will not harm you in any way. If you want to learn more about the law or this form, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at [www.dol.gov/ofccp](http://www.dol.gov/ofccp).

#### How do you know if you have a disability?

A disability is a condition that substantially limits one or more of your "major life activities." If you have or have ever had such a condition, you are a person with a disability.

#### Disabilities include, but are not limited to:

- Alcohol or other substance use disorder (not currently using drugs illegally)
- Autoimmune disorder, for example, lupus, fibromyalgia, rheumatoid arthritis, HIV/AIDS
- Blind or low vision
- Cancer (past or present)
- Cardiovascular or heart disease
- Celiac disease
- Cerebral palsy
- Deaf or serious difficulty hearing
- Diabetes

- Disfigurement, for example, disfigurement caused by burns, wounds, accidents, or congenital disorders
- Epilepsy or other seizure disorder
- Gastrointestinal disorders, for example, Crohn's Disease, irritable bowel syndrome
- Intellectual or developmental disability
- Mental health conditions, for example, depression, bipolar disorder, anxiety disorder, schizophrenia, PTSD
- Missing limbs or partially missing limbs
- Mobility impairment, benefiting from the use of a wheelchair, scooter, walker, leg brace(s) and/or other supports

- Nervous system condition, for example, migraine headaches, Parkinson's disease, multiple sclerosis (MS)
- Neurodivergence, for example, attention-deficit/hyperactivity disorder (ADHD), autism spectrum disorder, dyslexia, dyspraxia, other learning disabilities
- Partial or complete paralysis (any cause)
- Pulmonary or respiratory conditions, for example, tuberculosis, asthma, emphysema
- Short stature (dwarfism)
- Traumatic brain injury

#### Please check one of the boxes below:

☐ Yes, I have a disability, or have had one in the past

☐ No, I do not have a disability and have not had one in the past

☐ I do not want to answer

PUBLIC BURDEN STATEMENT: According to the Paperwork Reduction Act of 1995 no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. This survey should take about 5 minutes to complete.

Submit

Cancel

**Veteran Status Identification (U.S.-based new hires):**

1. Review the information about why you are being asked to provide this information and the protected veteran status classifications.
2. Click on the **Menu** icon and select one of the options from the dropdown menu.
3. Click **Submit** to submit the task.

Carnegie Mellon University is subject to the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended by the Jobs for Veterans Act of 2002, 38 U.S.C. 4212 (VEVRAA), which requires government contractors to take affirmative action to employ and advance in employment individuals in one or more of the following classifications: (1) disabled veterans; (2) recently separated veterans; (3) active duty wartime or campaign badge veterans; and (4) armed forces service medal veterans.

If you belong to any of the classifications of protected veterans listed above, CMU invites you to so indicate by checking the appropriate box below. Your response will assist our affirmative action efforts and will help us measure the effectiveness of our outreach and recruitment efforts of protected veterans.

Protected veteran classifications are defined by the federal government as follows.

**Disabled veteran** refers to one of the following:

- a veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the secretary of veterans affairs
- a person who was discharged or released from active duty because of a service-connected disability

**Recently separated veteran** refers to any veteran during the three-year period beginning on the date of such veteran's discharge or release from active duty in the U.S. military, ground, naval, or air service.

**Active duty wartime or campaign badge veteran** refers to a veteran who served on active duty in the U.S. military, ground, naval or air service during a war, or in a campaign or expedition for which a campaign badge has been authorized under the laws administered by the Department of Defense.

**Armed forces service medal veteran** refers to a veteran who, while serving on active duty in the U.S. military, ground, naval or air service, participated in a United States military operation for which an armed forces service medal was awarded pursuant to Executive Order 12985

**Reasonable Accommodations Notice:** If you are a disabled veteran, please let us know what accommodations we can make to better enable you to perform the essential functions of your job, including special equipment, changes in the physical layout of the job, changes in the way the job is customarily performed, provision of personal assistance services or other accommodations. This information will assist us in making reasonable accommodations for your disability.

**Please note:** Submission of protected veteran information is voluntary, and failure to provide it will not subject you to any adverse treatment. CMU uses the information only in ways that are consistent with VEVRAA as amended. CMU is an equal opportunity employer. We do not discriminate in hiring or employment against any individual on the basis of race, color, gender, national origin, ancestry, religion, physical or mental disability, age, veteran status, sexual orientation, gender identity, marital status, pregnancy, citizenship, or any other category or activity protected by the anti-discrimination laws. For more information about this form or the equal employment obligations of Federal contractors, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at [www.dol.gov/ofccp](http://www.dol.gov/ofccp).

Select a veteran status



- ☐ I identify as one or more of the above classifications of Protected Veteran.
- ☐ I am not a Protected Veteran.
- ☐ I do not wish to answer.

Menu icon:      Submit button:



Submit

## Wage Theft Prevention Act (CA, D.C., and NY employees only)

Due to regulations in California, D.C., and New York, employees in these areas will receive a Wage Theft Prevention Notice to review and acknowledge.

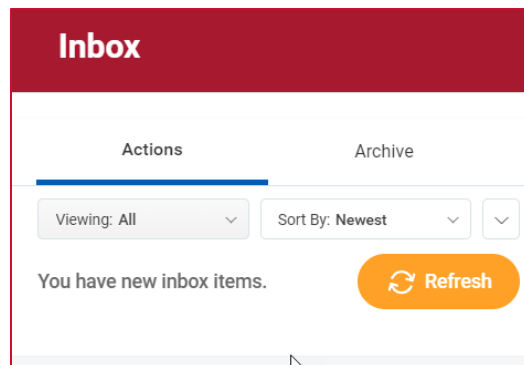
## Meal Break Waiver (non-exempt CA employees only)

Non-exempt employees in California will receive an optional California Meal Break Waiver Agreement. The California Meal Break Waiver Agreement form is optional and is used by the university to document a non-exempt employee's agreement to the option of waiving mandatory meal breaks required under California law. The execution of this form does not mean that you cannot take a meal break. However, you will not be permitted to waive a meal break without an executed waiver form on file within Workday. For additional information, refer to the [Carnegie Mellon University in California Staff Handbook \[pdf\]](#), Section II Employment Policies and Procedures, Item 7C Meal Periods and Breaks.

## Refresh your Inbox

### Follow-up Onboarding Tasks

When you have completed your initial onboarding tasks, Workday will notify you that you have new inbox items. To access your follow-up tasks, click the **Refresh** button. Your follow-up tasks will appear in your inbox.



## Complete the Form I-9

U.S.-based new hires complete Section 1 of the Form I-9 in Workday. Visit [CMU's Form I-9 page](#) for more information.

**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 (if any)  Other Last Names Used (if any)   
Address (Street Number and Name) \*  Apt. Number (if any)   
City or Town \*  State \*   
ZIP Code \*   
Date of Birth (mm/dd/yyyy) \*  U.S. Social Security Number

Check one of the following boxes to attest to your citizenship or immigration status (See page 2 and 3 of the instructions.):

☐ 1. A citizen of the United States  
☐ 2. A noncitizen national of the United States (See instructions)  
☐ 3. A lawful permanent resident (Enter USCIS or A-Number.)   
☐ 4. A noncitizen (other than Item Numbers 2. and 3. above) authorized to work until (exp. date, if any)

**Signature of Employee**  
I am aware that federal law provides for imprisonment and/or fines for false statements, or the use of false documents, in connection with the completion of this form. I attest, under penalty of perjury, that this information, including my selection of the box attesting to my citizenship or immigration status, is true and correct.

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 \* ☐

If a preparer and/or translator assisted you in completing Section 1, that person MUST complete the Preparer and/or Translator Certification on Page 3.

[Preparer and/or Translator Certification](#)

**Supplement A. Preparer and/or Translator Certification for Section 1**

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

How Many?

Instructions: This supplement must be completed by any preparer and/or translator who assists an employee in completing Section 1 of Form I-9. The preparer and/or translator must enter the employee's name in the spaces provided above. Each preparer or translator must complete, sign, and date a separate certification area. Employers must retain completed supplement sheets with the employee's completed Form I-9.

**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 ☐

### Note: Completion of the Form I-9 is required by federal law.

Once the Office of Human Resources verifies Section 1, they will complete Section 2 using the documentation you provide as proof of identity and authorization to work in the United States.

### To complete the Form I-9 Section 1:

1. Review and ensure all of your employee information is accurate in Section 1.
  - a. Fields marked with a red asterisk are required.
2. Select the citizenship option that applies.
  - a. If "noncitizen authorized to work," the expiration date must match documentation verifying your current status.
3. Electronically sign the form by checking the "I agree" box.
4. Indicate whether a preparer or translator assisted you in completing Section 1.
5. If a preparer or translator assisted you:
  - a. Indicate how many.
  - b. Ensure that all fields of the Preparer and/or Translator Certification have been completed.
6. Click **Submit** to submit the task.

### To complete the Form I-9 Section 2:

- If you are in the Pittsburgh area, schedule an appointment with HR Services by visiting this [link](#).
- Silicon Valley Employees: Email [staff-workers@sv.cmu.edu](mailto:staff-workers@sv.cmu.edu) to make an appointment.
- For remote workers, please review our [Instructions for Remote Workers](#).

## Manage Payment Elections Task

**This task is for all new hires.** This task allows new hires to use Workday to select direct deposit as a payment method and provide the necessary account information. The task appears in your inbox once all of your initial onboarding tasks and your Form I-9 are complete.

1. Click on the **Manage Payment Elections** task in your inbox to get started.
2. Complete all fields marked with an asterisk.
3. Click **Ok** to submit the task.

### Manage Payment Elections

3 minute(s) ago

Person Frick, Henry Clay

#### Account Setup

Account Holder Name Frick, Henry Clay

Sample Check

Jonathan Doe  
4321 Main St  
Anytown, CA 94000

YOUR BANK NAME  
1234 567890  
Account # 1234 567890

DO NOT INCLUDE Check #

9 Digit Routing #  
Between the 12 symbols

Account #  
Include all zeros

Close

#### Account Information

Account Nickname (optional)

Routing Transit Number \*

Bank Name \*

Bank Identification Code

Account Type \*

☒ Checking  
☐ Savings

Account Number \*

OK Cancel

### Note:

- Your Social Security number should be entered before you add payment elections via the Edit Gov't IDs task
- If you do not yet have an SSN, you will be issued a temporary ID for payroll purposes. To maintain your payment elections, you will need to update your SSN via the Change My Gov't ID business process in Workday as soon as you receive your SSN.
- You must have a U.S. bank account to set up direct deposit.
- Employees in Qatar are able to enter Qatar bank accounts.
- You can have your pay distributed to up to 3 separate accounts by adding additional accounts and then updating your payment elections to indicate how your pay should be distributed.
- New hires in the U.S. who do not have a U.S. bank account (or do not have direct deposit set up prior to the payroll deadline) will have payment elections added by the Office of Human Resources for a reloadable (ADP) pay card.
- CMU no longer distributes paper paychecks.

## Update Tax Elections Task

**This task is for all new hires.** This to-do appears in your inbox once all of your initial onboarding tasks and your Form I-9 are complete.

1. Click on the **Update Tax Elections** hyperlink on the to-do to go to CMU's Paperless Employee page.
2. Make your tax elections and submit them in Paperless Employee. If you need guidance, refer to the [Tax Election Quick Guide \[pdf\]](#) and the [Pay and Taxes FAQs](#) on CMU's website.
3. Click **Submit** on the to-do complete the task.

Inbox

Actions

Archive

Viewing: All

Sort By: Newest

Payment Election Enrollment Event

1 hour(s) ago

Update Tax Elections

1 hour(s) ago - Effective 04/26/2021

Change Benefits for Life Event

1 hour(s) ago - Effective 04/26/2021

Update Work Space

1 hour(s) ago - Effective 04/26/2021

Update Work Phone Number

1 hour(s) ago - Effective 04/26/2021

Complete To Do

Update Tax Elections

1 hour(s) ago - Effective 04/26/2021

For

System Guide Architect

Overall Process

Hire: Carnegie, Andrew (acarnegie)

Overall Status

Successfully Completed

Instructions

Please update your tax elections. To get started, click on the link below. Note: To update your tax elections, you must have a Social Security number entered in the system.  
To remove this task from your inbox, click the Submit button.

Update Tax Elections

enter your comment

Submit

Save for Later

Close



## Change Benefit Elections Task

The Benefit Enrollment task will become available for eligible employees once their initial Onboarding tasks and Form I-9 are complete. You can view the [Benefits Elections \(Enrollment\) System Guide \[pdf\]](#) for more details.

1. Click on **Let's Get Started** within the task to enroll in or waive your CMU benefits.
2. Your Health Care and Accounts and Insurance page displays. Click on Enroll (or Manage) for each plan that appears on your employee plans page, select a plan, click Confirm and Continue to manage dependents for the plan, and save to return to your Health Care and Accounts and Insurance screen.
3. You can select dependents from your dependents list or add a new dependent to your list by clicking Add New Dependent on the Dependents page.
4. When you are finished with benefits elections, click Review and Sign.
5. Review your elections, check the "I Accept" checkbox, and click Submit.
6. Click on the View Benefits Statement button to view and print your benefits elections.

**Note:** You have 30 days from your hire date to either enroll in or waive CMU benefits. Default elections will be applied if you do not enroll/waive in that timeframe.

## Update Work Phone Number Task

This task is sent to faculty and staff one week after the hire date if the Form I-9 is complete and a work phone number was not entered as part of the hire.

1. Click on the **Change My Work Contact Information** hyperlink to get started.
2. On the Change My Work Contact Information page, click the **Add** button, enter your work phone number, and click **Submit**.
3. Once you've added your work phone number, click **Submit** on the to-do to remove the to-do from your inbox.

The screenshot shows a task titled "Complete To Do" with the sub-header "Update Work Phone Number". It indicates the task was received 1 minute ago and is effective from 12/28/2023. The task is assigned to "Academic Advisor" and lists "Hire: Frick, Henry Clay (hfrick)" as the overall process. The overall status is "Successfully Completed".

The instructions state: "Please update your Workday profile to accurately indicate your work phone number. Your work phone number should be your CMU Cisco phoneline, if you have one. For guidance on entering your work phone number, refer to the [Update Work Phone System Guide](#). To get started, click on the Change My Work Contact hyperlink below. To remove this task from your inbox, click the **Submit** button."

Below the task details is a "Change My Work Contact Information" section for "Frick, Henry Clay". It includes a profile picture and a "Submit" button. Below this is a "Phone" field with an "Add" button and an "Email" field. At the bottom, there is a comment box with the placeholder "enter your comment" and three buttons: "Submit", "Save for Later", and "Cancel".

### Tips for Entering a Work Phone Number:

- You only have access to update your work phone number on the Change My Work Contact page.
- Your CMU email address pre-populates and cannot be changed.
- Your primary work phone should be your CMU Cisco phone line.
- Enter the entire number in the Phone Number field.
- Leave the Phone Extension field blank.
- Select "Public" as the Visibility.
- Your primary work number appears in the CMU directory.

## Update Work Space Task

This task is sent to faculty and staff one week after their hire date if the Form I-9 is complete and a workspace was not entered as part of the hire.

1. Click on the **Change My Work Space** hyperlink to get started.
2. Enter your workspace with an effective date of today, and then click **Submit**.
3. Once you've added your workspace, click **Submit** on the to-do to remove the to-do from your inbox.

**Complete To Do**  
**Update Work Space** Actions  
15 minute(s) ago - Effective 02/08/2021

**For** Academic Adviser

**Overall Process** Hire: Frick, Henry Clay (hcfri) Success

**Overall Status** Successfully Completed

**Instructions**  
Please update your Workday profile to accurately indicate your workspace. Your workspace is, at a minimum, the building in which you are located on campus. The workspace can also include the floor and the office number. It is recommended that you provide as much detail as possible when updating your workspace in Workday. This information is used for mail distribution and for locating employees when necessary. For guidance on entering a workspace, refer to the [Update Work Space System Guide](#). To get started, click on the Change My Work Space hyperlink below.  
To remove this task from your inbox, click the **Submit** button.

[Change My Work Space](#)

**Change My Work Contact Information**  
**Frick, Henry Clay** Actions

1. Workspace changes initiated by the employee route to the supervisor for approval prior to implementation.  
2. The effective date of a workspace change cannot be in the future.  
3. If you hold multiple positions at CMU, be sure to select the appropriate position prior to submitting the Change Work Space transaction.  
**Note to Student Workers and TES employees:** The Position field defaults to your primary position, to which you cannot add a workspace. To add or edit a workspace, you must change the Position field to a position other than 9999/9800.  
4. A workspace cannot be added for a remote worker (i.e., the Location field is "Remote Work Location").  
5. You must select one of the available workspace options, which are populated according to your location. For example, if your location is Pittsburgh, your workspace options will all be in Pittsburgh.  
6. Tips for entering a workspace in the Work Space field:  
a. Click on the list icon on the right side of the Work Space field. A search bar and three filter options display: Work Space by Building, Work Space by Floor, and Work Space by Room.  
b. If your Location is Pittsburgh, please use the Search bar instead of the "by Room" filter. (If you filter "by room," you will receive an error because there are too many results.) Enter the room number in the Search field, and then select from the list that displays.  
7. For guidance on changing a workspace, refer to the ["Change Work Space" section of the Post-Hire Employment Actions System Guide](#).

**Effective Date \*** 03/10/2021 Calendar icon

**Position** Academic Adviser

**Location** Pittsburgh

**Work Space \*** Menu icon

enter your comment

**Note:** Work Space is a field in Workday used to store the employee's physical work location on campus. The university uses this information to locate an individual in case of emergency, so it is important that every employee's work space is up to date and accurate.

### Tips for entering a workspace in the Work Space field:

- You must select one of the available work space options, which are populated according to your location. For example, if your location is Pittsburgh, your workspace options will all be in Pittsburgh.
- Click on the Menu icon on the right side of the Work Space field. A Search bar and three filter options display: Work Space by Building, Work Space by Floor, and Work Space by Room.
- If your Location is Pittsburgh, use the Search bar instead of the "by Room" filter. (If you filter "by room," you will receive an error because there are too many results.) Enter the room number in the Search field, and then select from the list that displays.

- If you are not assigned a specific workspace in Pittsburgh, simply submit the task. Or, if they need to confirm their workspace their department or HRG can confirm.