Workday 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 *(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!

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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workday.

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.

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.
- ❑ **Submit upcoming time off requests** by clicking Request > Request Absence. Future time offs will not transfer from your legacy system.

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.