

ONBOARDING

The steps listed below will take you through the Workday inbox onboarding activities as a new employee. All inbox items must be completed and submitted from your inbox in order to complete the onboarding process. The Onboarding activities that must be completed will be sent to your Workday inbox and include the following:

1. Edit government IDs (Social Insurance Number)
2. Enter personal & contact information
3. Manage pay elections (direct deposit information)
4. Complete withholding elections (tax forms)
5. Change emergency contacts
6. Review documents (welcome letter containing information for new employees)
7. Complete self identification (employment equity survey)
8. Edit passports and visas (work/study permit information for employees with a temporary SIN)

1. EDIT GOVERNMENT IDS

1. Click the inbox icon to navigate to the *Edit Government IDs* tasks in your Workday inbox.



2. Click the + under the *National IDs* table to add your Canadian Social Insurance Number (SIN). Click in the empty fields to select the following:

- **Country: Canada**
- **National ID Type: Social Insurance Number** or **International Tax Number (ITN)** (if receiving non-employment income only)
- **Add/Edit ID: type 9 digit Social Insurance Number**
- **Issued Date: Leave blank**
- **Expiration Date:** Enter if Social Insurance Number starts with a “9” , otherwise, leave blank


Note: If you have already provided your SIN it will appear as XXX XXX XXX and no further action is required – click **Submit** to clear this item. Only a Canadian SIN or ITN is required.

National IDs 1 item

	*Country	*National ID Type	Current ID	Add/Edit ID	Issued Date	Expiration Date
+	x Canada	x Social Insurance Number (SIN)		958 555 555	MM / DD / YYYY	11 / 30 / 2019

3. Click **Submit** and then click **Open** to continue to update your personal and contact information.

Up Next

 Rachal Benefits

Enter Personal & Contact Information

2. ENTER PERSONAL & CONTACT INFORMATION

- From your Workday inbox, open the *Enter Personal & Contact Information* task.
- Update the following (screen shot is on next page):
 - Gender
 - Date of Birth
 - Marital Status (if eligible for benefit plan)
 - Citizenship (mandatory for Faculty and Non-Faculty appointments):
 - Citizen (born in Canada or dual citizenship)
 - Neither Citizen or Permanent Resident (non-resident)
 - Permanent Resident (Canadian PR Card)
 - Primary Address (permanent address where T4 tax forms can be sent)
 - Home phone and email address as applicable

Note: If an error is received when updating your address, submit without making any changes and complete all inbox onboarding tasks. Then, from the *Personal Information* application on your home page, click on **Contact Information** and update your address from there.

Change Personal Information

Gender

Gender
Female
✎

Date of Birth

Date of Birth
11/01/1982
✎

Age
36 years, 0 months, 20 days

Marital Status

Marital Status
Married (Canada)
✎

Marital Status Date

Citizenship Status

Citizenship Status
Permanent Resident (Canada)
✎

Home Contact Information

Primary Address

Address
200 University Ave W, Waterloo, ON N2L3G1

Country *

☰

X Canada
☰

Address Line 1 *

200 University Ave W
☰

Address Line 2

City

Waterloo
☰

Province or Territory *

X Ontario
☰

Postal Code *

N2L3G1
☰

3. Click **Submit** and **Done** to continue on to update your direct deposit information.

3. MANAGE PAY ELECTIONS/UPDATE BANKING ELECTIONS

Workday provides increased flexibility to update banking for up to 3 accounts. This allows you to split your pay into different accounts such as chequing and savings.

1. From the Workday inbox, open the *Payment Election Enrollment Event* task.
2. Leave **Direct Deposit** as the default setting under Preferred Payment Method and enter your direct deposit information in the Account Information section below the sample cheque.

Note: Institution Number refers to Bank Number as shown on the sample cheque (3 digits).

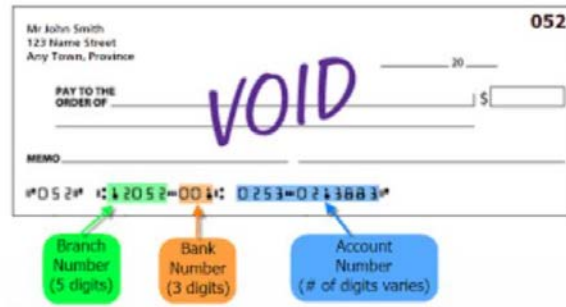
Preferred Payment Method

Payroll Payment	*	<input checked="" type="checkbox"/> Direct Deposit	:
Deferred Salary/EUC - HR Use Only	*	<input checked="" type="checkbox"/> Direct Deposit	:
Finance Expense	*	<input checked="" type="checkbox"/> Direct Deposit	:

Account Setup

Worker

Sample Check



Account Information

Account Nickname (optional)

Account Type * Checking
 Savings

Bank Name *

Institution Number *

Account Number *

Branch ID *

3. Click **OK** to continue to the payment elections screen.
4. If using only one account, click **Submit** to complete the direct deposit set up. If adding multiple accounts, see step 5 below.

- Click the **Add** button underneath the account information and follow the steps above to enter the additional account information.
- Click Edit in the far right column of the Payroll Payment row to split the deposit between the accounts.

Accounts 1 item

Account Nickname	Country	Bank Name	Account Type	Account Number	
TD Canada Trust *****4567	Canada	TD Canada Trust	<input checked="" type="radio"/> Checking <input type="radio"/> Savings <input type="radio"/> None of the above	*****4567	<input type="button" value="Edit"/> <input type="button" value="Remove"/>

Payment Elections 3 items

Pay Type	Payment Elections				
	Payment Type	Account	Account Number	Distribution	
Payroll Payment	Direct Deposit	TD Canada Trust *****4567	*****4567	Balance <input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Deferred Salary/EUC - HR Use Only	Direct Deposit	TD Canada Trust *****4567	*****4567	Balance <input checked="" type="checkbox"/>	<input type="button" value="Edit"/>
Finance Expense	Direct Deposit	TD Canada Trust *****4567	*****4567	Balance <input type="checkbox"/>	<input type="button" value="Edit"/>

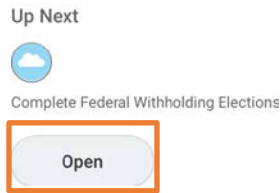
- Click the + in the table to enter the additional account information.
- Select **Canada** as the *Country*, **Direct Deposit** as the *Payment Type* and the additional account by clicking in the associated empty fields.
- Select the appropriate distribution between accounts in the far right-hand column. If an amount is allocated to an account, the remaining account must be designated as *Balance*. If percentages are selected, the combined total must equal 100 percent.

Payment Elections 2 items

Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
<input type="button" value="+"/>	Canada	CAD	Direct Deposit	TD Canada Trust *****4567	<input type="radio"/> Balance <input checked="" type="radio"/> Amount 500.00 <input type="radio"/> Percent 0
<input type="button" value="+"/>	Canada	CAD	Direct Deposit	CIBC *****5678	<input checked="" type="radio"/> Balance <input type="radio"/> Amount 0.00 <input type="radio"/> Percent 0

- Click **OK** and then **Submit** on the next screen to complete your direct deposit set up.

Up Next Complete Federal Withholding Elections - Click **Open**.



4. COMPLETE WITHHOLDING ELECTIONS/UPDATE TAXATION

All employees are exempt from paying income tax on the basic personal amount on both the federal and provincial tax forms (TD1/TD1ON). Additional amounts can be added to the basic personal amount to allow for higher earnings that are not subject to income tax deductions. Please read each section carefully and enter additional amounts for any section applicable to you.

If these fields are left as zero, income tax will be deducted based on the basic personal amount and any additional items can be claimed when you file your taxes.

Notes: If you are only claiming the basic personal exemption, you will still need to submit these tax forms to complete your onboarding.

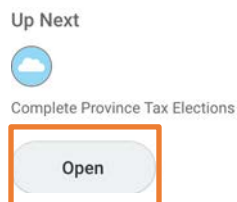
If you are claiming tuition, provide an estimate of the amount that will be paid during the current taxation year (i.e. enter the total estimated amount for winter, spring and fall term of the current year).

More than one employer: Refers to also working outside of the University and Affiliates. If you have more than one position at UW, do not check this box.

Total Income less than total claim amount: If you know you will not earn the basic personal amount in the current tax year, select this box to not have any income tax deducted from your payments.

Non-Residents: If you are a non-resident but are working in Canada, do not check the Non-residents box. If this box is checked, the basic personal amount will not apply and you will be taxed on all earnings.

Once the form is complete, check I certify that the information given on this form is correct and complete. and click **Submit**.



Open *Complete Province Withholding Elections* to complete the Provincial tax form and complete as above.

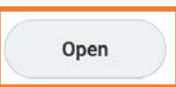
Note: Tuition is no longer eligible to be claimed on the provincial tax form.

Once complete, click **Submit** and then click **Open** to continue to the *Change Emergency Contact* task.

Up Next





Change Emergency Contacts



5. CHANGE EMERGENCY CONTACTS

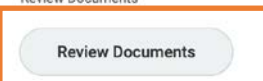
1. Open the Change Emergency Contacts task.

1. Click the edit button  in the Legal Name section and enter your emergency contact's first and last name.
2. Click the edit button in the Relationship section and click the menu prompt  to select from the available relationship options.
3. Click **Add** in *Primary Phone* section to add a phone number, including the area code.
4. Click **Submit** at the bottom of the screen.
5. Click the **Review Documents** button to download and review the University of Waterloo welcome letter, which contains important information for new employees of the University.

Up Next



Review Documents



6. OPEN REVIEW DOCUMENTS AND SUBMIT

1. Click the *Welcome Letter* document to review and download/save the Welcome Letter for your reference. No documents need to be attached, this is for your reference only.
2. Once reviewed, click **Submit** and **Done** to continue on to the next onboarding task.

7. COMPLETE SELF IDENTIFICATION

[Employment Equity](#) is a program legislated by the federal Employment Equity Act. This is an optional survey but it is very important to complete to help ensure the University of Waterloo is a fair and equitable place to work. Even if you do not complete the survey, you will need to submit the instructions page from your Workday Inbox to complete your onboarding. If you choose to complete the survey, this task will need to be completed from your Worker Profile by following the instructions below.

1. Select the cloud icon/your profile picture on the top right hand corner to navigate to your worker profile.
2. Click the **Job** tab and from the **Additional Data** option, click **Edit**.
3. Update your Employment Equity Information.

The screenshot shows the Workday interface for a worker profile. On the left, a blue sidebar contains navigation options: Actions, Email, Team, Summary, Overview, Job (highlighted with an orange box), Compensation, Personal, Contact, Pay, and Time Off. The top navigation bar includes tabs for Job Details, Employment Data, Service Dates, Additional Data (highlighted with an orange box), and Management Chain. The main content area shows the 'Employee Equity Survey - Single Instance' form, which includes a 'View As Of' date of 02/06/2019 and an 'Effective Date' field. The survey questions are listed below, and an 'Edit' button is highlighted with an orange box at the bottom of the form.

4. Once complete, navigate back to your Workday inbox and **Submit** the *Complete Self Identification* inbox task to finalize the transaction and complete your onboarding.

Submit

8. EDIT PASSPORTS AND VISAS

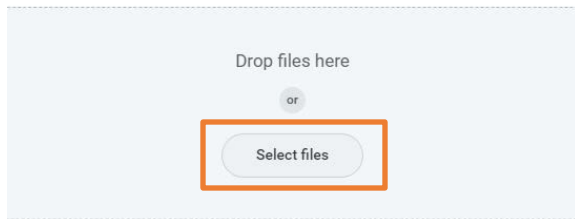
If your Social Insurance Number starts with a 9, you will need to enter your Work or Study Permit information into Workday by following the steps outlined below.

Note: Passport information is not required.

1. Click the *Passports and Visa Change* task in your Workday inbox.
2. Click the + in the *Visas* table to add a row.
3. Select the menu prompt in the empty *Country* field to select Preferred Countries > **Canada**.
4. Select **Work Permit** by clicking in the *Visa ID Type* empty field box.
5. In the *Identification #* field, enter the UCI/IUC number.
6. Enter the *Issued Date* and the *Expiry Date* of the permit.
7. Drag a copy of your work/study permit in the attachment section below or click **Select Files** to upload it.

Note: If this is a Study Permit, select Work Permit and enter a comment in the Comment field below that this is a Study Permit.

Visas <small>1 item</small>					
	*Country	*Visa ID Type	Identification #	Issued Date	Expiration Date
	<input type="text" value="Canada"/>	<input type="text" value="Work Permit"/>	<input type="text" value="1234-1234"/>	<input type="text" value="01 / 01 / 2019"/>	<input type="text" value="09 / 03 / 2019"/>



8. Once your work or study permit has been uploaded, click **Approve** to finalize your onboarding.

ONBOARDING TROUBLESHOOTING

I entered something wrong in the onboarding process. Can I go back and change it?

You need to complete the onboarding process in Workday before you can make any changes to the information you submitted. Please ensure that there are no action items left in your Workday inbox and then reference our user guides on how to make changes to your personal information.

I entered my banking information into Workday; why wasn't my paycheque deposited into my bank account?

There are certain pieces of information you are required to enter through the onboarding process before your pay can be deposited into your bank account. This includes your Social Insurance Number (SIN), mailing address, and banking information. The required pieces of information must be entered into Workday at least 2 days prior to the pay date in order to have your pay direct deposited; otherwise, a cheque will be issued to you for that pay.