



## New Hire's Step by Step Guide: Onboarding & Workday Tasks

Workday is a cloud based system used to house employee information. Forget the mounds of paper you are used to filling out and look for the electronic tasks in your Workday inbox to complete your onboarding. Below are the new hire tasks and instructions that must be completed in your first week.

---

### Task #1 Complete Form I-9

As part of the process to onboard new employees, Bentley University is required to validate that all new hires are authorized to work in the United States. The Form I-9 is the required form from the U.S. government for this purpose. We have employed an electronic I-9 process for your convenience.

**STEP 1:** Please complete all fields in section 1 of the Form I-9 electronically in Workday. **Section 1 of the Form I-9 must be completed on or before your first day.**

**STEP 2:** Please make an appointment with HR to meet on campus to complete Section 2 of your Form I-9 and verify your documentation. Step 2 must be complete within the **first three days of your start date.** To schedule an appointment email [kmanning@bentley.edu](mailto:kmanning@bentley.edu).

### Task #2 Add Social Security Number

**Under the Proposed IDs/National IDs section:**

Click on the + to add a row. Then follow the below instructions for each section:

**Country:**

From the drop-down menu, select Frequently Used, then select United States of America.

**National ID Type:**

From the drop-down menu, select the Social Security Number button.

**Add/Edit ID Number:**


Add your Social Security number, click submit.



### Task #3

#### Enter Passport & Visa Information

Please enter your Passport and Visa information by clicking the task "Change My Passports and Visas" below. If this does not apply to you, please hit "Submit" below to complete this step without entering information.

Please complete all required fields by clicking on the  located to the right of section.

### Task #4

#### Enter Personal Information

Review/enter the information in the following sections and correct if needed. Hit submit when finished.

- *Legal Name*
- *Preferred Name*
- *Legal Sex*
- *Date of Birth*
- *Place of Birth*
- *Marital Status*
- *Race/Ethnicity*
- *Citizenship Status*

### Task #5

#### Enter Contact Information

Review/enter the information in the following sections and correct if needed. Hit submit when finished.

- *Home Contact Information- complete all required sub-sections*
- *Work Contact Information- complete all required sub-sections*



## Task #6

### Federal Tax Election

Complete all required fields. For questions regarding payroll please contact our payroll department at 781.891.2154. Hit submit when finished.



## Task #7

### State Tax Election

Complete all required fields. For questions regarding payroll please contact our payroll department at 781.891.2154. Hit submit when finished.



## Task #8

### Direct Deposit Form

Complete all required fields. You will need your Routing Number, Bank Name, Account Type, and the Account Number. Hit submit when finished.

Sample Check

Jonathon Doe  
4321 Main St.  
Anywhere, CA 94000

DATE \_\_\_\_\_

\$ \_\_\_\_\_  
Dollars

YOUR BANK NAME  
9876 1st St.  
Anywhere, CA 94000

DO NOT INCLUDE  
Check # \_\_\_\_\_

⑆ 23456789 ⑆ 000 234567890 ⑆ -00-123-

9 Digit Routing #  
Between the ⑆ symbols

Account #  
Include all zeros

For questions regarding payroll please contact our payroll department at 781.891.2154.



## Task #9

### Change Emergency Contact

Review/enter the information in the following sections and correct if needed. Hit submit when finished. It is important this section is completed and current so that we have a contact in case of an emergency.

- *Primary Emergency Contact - complete all required sub-sections*
- *Alternate Emergency Contacts- complete all required sub-sections*

---

## Task #10

### Benefit Change

You have a 30 day window to complete your benefit enrollment. After your benefit window is closed and you have successfully enrolled your benefits will begin on the 1st of the month following your start.

*\*For all benefits related questions please contact Sandy Smith, Senior Benefits Specialist at [ssmith@Bentley.edu](mailto:ssmith@Bentley.edu) or Shauna Anderson, Human Resources Systems and Benefits Analyst at [sanderson@Bentley.edu](mailto:sanderson@Bentley.edu). You can also call the HR Front desk for assistance at 781.891.3427.*

---

## Task #11

### Acknowledge/ Sign the Massachusetts Family & Medical Leave Law form

Please review “Rights under Massachusetts Family Medical Leave Law” police and indicate your acknowledgment by checking the box below.

By selecting “I agree” and hitting “Submit”, you are acknowledging your receipt of the information.

In the event you refuse to submit your acknowledgement of receipt, you should indicate your refusal to submit your acknowledgement in the Comments section below and hit “I agree” and “Submit”. Your acknowledgement response will be retained in Workday.



## Task #12

### Complete the Prior Service Credit Form (if applicable)

If you have prior service credit at another institution or non-profit, please complete the attached form (in Workday) and submit to your Benefits partner. This credit will count as eligibility to our Employer Contribution on 403(b). Please print the form and return it to Human Resources.

If you are not eligible for the prior service credit please submit the task electronically to push it through the system. No action will be taken.

If you have any questions about the form please contact Sandy Smith, Senior Benefits Specialist at [ssmith@Bentley.edu](mailto:ssmith@Bentley.edu) or Shauna Anderson, Human Resources Systems and Benefits Analyst at [sanderson@Bentley.edu](mailto:sanderson@Bentley.edu). You can also call the HR Front desk for assistance at 781.891.3427.

---

## Task #13

### Acknowledge/ Sign Other HR Policies

Please review the documents listed and indicate your acknowledgment by clicking the “I agree” box for each.

- *Confidentiality Agreement HR/IT*
- *Americans with Disabilities Act (ADA) Policy*
- *EEO and Non-Discrimination Policy*
- *Sexual Harassment Policy*
- *Workplace Discrimination, Harassment, and Bullying Policy*

By Acknowledging the documents you are stating that you have read and agree to the contents and terms of the each document presented.