

Onboarding Status Summary – for Managers and HR Partners

Workday's *Onboarding Status Summary* report is a tool to review onboarding status for newly hired employees.

Report Process

1. Search for **Onboarding Status Summary**
2. Enter parameters
 - a. Organization – select supervisor organization(s) to review
 - i. Managers and HR Partners can both run the report
 - ii. To run for a hierarchy, the user must have access to all applicable subordinate supervisory organizations
 1. Select ***Include Subordinate Organizations***
3. Click **OK** to run

Results:

Worker	Hire Date	Short Notice	Position	Supervisory Organization	Hiring Manager	Onboarding Progress	In Progress	In Progress For >1 Day	Completed
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	0%	Contact Change Edit Government IDs Enter Personal Information Personal Information Change		
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	62%	Change Emergency Contacts Disability Self-Identification Florida Tech Conflict of Interest Review Policies and Disclosures Veteran Status Identification		Complete Federal Withholding Elections Complete Form I-9 Edit Government ID (SSN) Enter Personal Information Review Form I-9 More (2)
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	89%	Approval by Benefits Partner		Change Self-Identification of Disability Change Veteran Status Identification Complete Federal Withholding Elections Complete Form I-9 Edit Government ID (SSN) More (11)

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1. **Onboarding Progress** indicates the percentage of completed tasks
2. Review **In Progress** and **Completed** tasks
 - a. Ensure time sensitive items are processed before training or job activity occurs

3. Tasks launch in four sets. Frequent WD inbox monitoring is recommended
 - a. Items returned for correction will include comments
 - b. A new set will appear as the previous set is successfully processed
4. **Important:** Sets 1 and 2 are time sensitive. Managers are to verify each new hire employee's completion of these items before training or job duties begin. The start date may be revised at the department's request if the employee has not been active in the position

Set 1– time sensitive

- Enter Personal Information – includes *Contact Change* and *Personal Information Change*
- Edit Government IDs

Set 2 – time sensitive

- Complete Federal Withholding Elections
- Complete Form I-9

****Present original, unexpired Form I9 identification to Human Resources in the RA Work Building****

Set 3 - *complete within 1 week of hire date*

- Change Emergency Contacts
- Review Policies & Disclosures
- Disability Self-Identification
- Veteran Status Identification
- Florida Tech Conflict of Interest

Set 4

- Payment Elections
- (FT employees) Benefit Elections (*hard deadline - 30 days from start date*)

5. **Note:** After completing onboarding task Sets 1 and 2, an international student without a Social Security (SS) number is permitted to work up to 90 days as an SS card application is submitted to the SS Administration
 - a. The *Review Form I9* task will remain pending until the assigned SS number is reported in Workday
 - b. **Important:** The student will receive the Social Security application and instructions as s/he visits HR to present Form I9 identification
 - i. The document requires the manager's authorization. If the student has not provided this to the manager, s/he most likely has not presented IDs to Human Resources