All pre-employment documents in Steps 1 and 2 <u>must be completed prior to Day 1</u> of New Employee Orientation. The order in which you complete the documents does not matter.

Step 3 document(s) will populate at midnight on the day of your new hire orientation and do not need to be completed prior to orientation. They will be discussed at orientation.

Need Assistance?

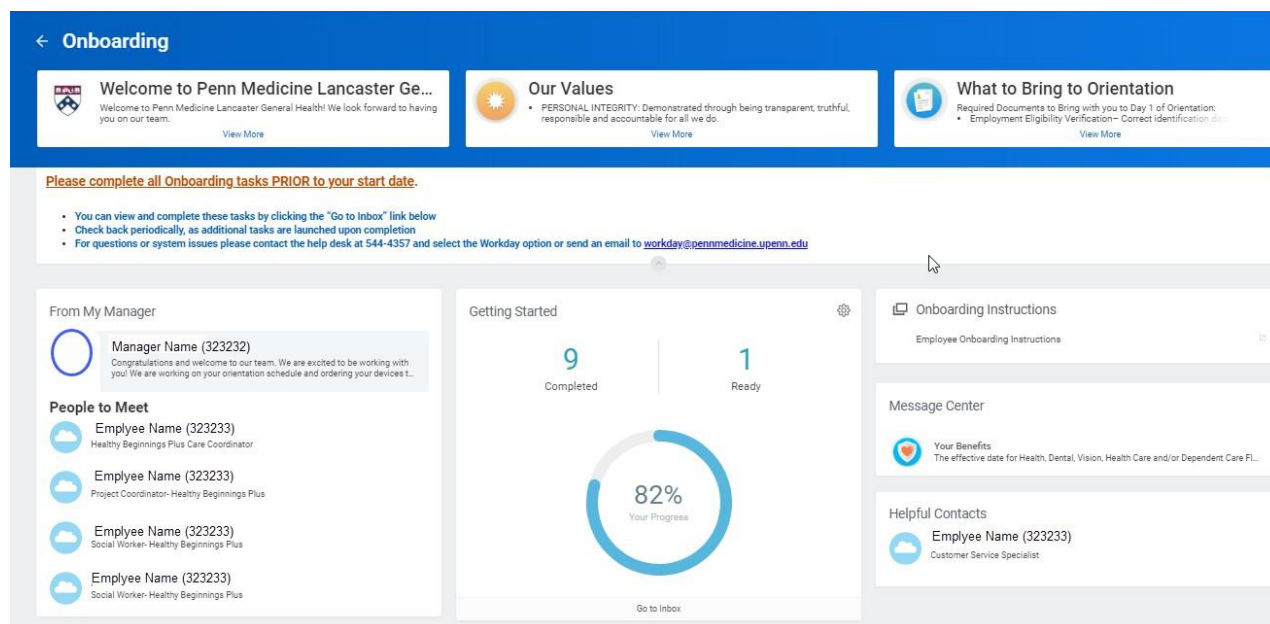Call (717) 544-4357, option 7 (Workday Help Desk)

Email us at: Workday@pennmedicine.upenn.edu

Getting Started:

- To access your pre-employment documentation, log into Workday by using the link, username, and password provided in the 'Welcome to Lancaster General Health/Penn Medicine!' email.

  Note – The username and password are case sensitive. Please do not copy and paste or include spaces before or after the username and password.

- If it is your first time logging in, review the navigation tips and then click "Let's get started!"

- Click on the **Onboarding** worklet (see icon to the right). This worklet contains important information you need to know and links to actions you need to take before your orientation date (i.e., a message from your manager, items to bring with you to orientation, a link to begin pre-employment documentation, etc.)

Onboarding

- Take some time to orient yourself to this page. You can access the Onboarding worklet as often as needed to track your progress, access your pre-employment documentation, etc. The Onboarding worklet will remain on your Workday home screen even after your scheduled orientation date.

Step 1:

Review Documents for Onboarding

- Click and review the 'Covid Vaccine Requirement' document.

  HINT: Selecting 'I Agree' is your electronic signature verifying that you read and understand that you are accountable for content.

- Once complete click **Submit**.

Enter Personal Information

- Come information on this form was pre-populated from your application. Please review and make any necessary updates. Date of Birth and Gender are required fields and are not pre-populated. This information must be added to move forward.

  HINT: Click the edit icon 🖉 to make changes/add information.

- Once complete click **Submit**

  TROUBLESHOOTING: If you receive an error, click on the error icon ⊘ 1 Error and it will tell you what information is missing, as well as outline the area that needs fixed in red.

ID Change

- Verify or add your Social Security Number (SSN).

  - To add your SSN click the add icon ⊕ under **National IDs**.
  - Under **Country** click the prompt icon ☰ , select **Frequently Used**, and click **United States of America**.
  - Under **National ID Type** click the prompt icon and select **Social Security Number (SSN)**.
  - Enter your SSN under **Identification #**.

- Once complete click **Submit**.

  TROUBLESHOOTING: If you receive an alert ⚠ 1 Alert   View All , click on the alert icon to view the message. The message, "This national identifier you entered is already in use. Verify that the information is accurate," appears when the legal name submitted in your personal information does not match the name on your social security card exactly (i.e., a middle initial on one and not the other). If you are 100% sure your number is accurate, press Submit again to move past the alert.

Step 2:

- After submitting the task in Step 1, an orange refresh bar, will appear at the top of your inbox, with the message, 'You have new inbox items."   ⟳ Refresh

- Click the refresh icon to populate your remaining onboarding tasks, outlined in Step.

Complete Form I-9

- Review the **Employee Information and Attestation** section at the top of the form for accuracy. Correct any information that is not accurate (information is pulled from your application).

  HINT: If you correct something on your I-9 form, make sure to also update it in Workday.

- Under the Employee Information and Attestation section, select the appropriate citizenship status.

- Sign the form by selecting, 'I Agree.'

- Select the appropriate box for **Preparer and/or Translator Certification**.

  HINT: If you completed the form by yourself, select 'I did not use a preparer or translator'. No additional information is needed if you did not use a preparer or translator.

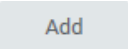- Once complete, click **Submit**.

In addition to completing this form, **you must bring identification with you on the first day of your scheduled New Employee Orientation**. Acceptable forms of identification are shown below. You must provide either, 1) one form of ID from List A (i.e., an up-to-date passport), or 2) one form of ID from List B AND one form of ID from List C (i.e., your driver's license and your social security card).

LIST A Documents that Establish Both Identity and Employment Authorization	OR	LIST B Documents that Establish Identity	AND	LIST C Documents that Establish Employment Authorization
1. U.S. Passport or U.S. Passport Card		1. Driver's license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address		1. A Social Security Account Number card, unless the card includes one of the following restrictions: (1) NOT VALID FOR EMPLOYMENT (2) VALID FOR WORK ONLY WITH INS AUTHORIZATION (3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION
2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)				
3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa		2. ID card issued by federal, state or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address		
4. Employment Authorization Document that contains a photograph (Form I-766)				2. Certification of report of birth issued by the Department of State (Forms DS-1350, FS-545, FS-240)
5. For a nonimmigrant alien authorized to work for a specific employer because of his or her status: a. Foreign passport; and b. Form I-94 or Form I-94A that has the following: (1) The same name as the passport; and (2) An endorsement of the alien's nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form.		3. School ID card with a photograph 4. Voter's registration card 5. U.S. Military card or draft record 6. Military dependent's ID card 7. U.S. Coast Guard Merchant Mariner Card 8. Native American tribal document 9. Driver's license issued by a Canadian government authority		3. Original or certified copy of birth certificate issued by a State, county, municipal authority, or territory of the United States bearing an official seal 4. Native American tribal document 5. U.S. Citizen ID Card (Form I-197) 6. Identification Card for Use of Resident Citizen in the United States (Form I-179) 7. Employment authorization document issued by the Department of Homeland Security
		For persons under age 18 who are unable to present a document listed above:		
6. Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI		10. School record or report card 11. Clinic, doctor, or hospital record 12. Day-care or nursery school record		

Enter Contact Information

- Click [Change My Contact Information] to open the form and review your information. Information was pre-populated from your application. Please make any updates.

- Once you have verified that the information it is accurate, click **Submit.** This will return you to your inbox and the Enter Contact Information – **Complete To Do** screen.

- Click **Submit** at the bottom of the **Complete To Do** screen. This verifies that you clicked the "Change My Contact Information" button and reviewed/updated your information.

Change Emergency Contacts

- Use the edit icon [✏️] to enter your emergency contact's information under **Legal Name** and **Relationship**.

- Click [Add] to enter a **Primary Address** and **Primary Phone** and Alternate Emergency Contacts (if needed).

  HINT: Press the save icon [✓] when finished in a field to move forward.
  HINT: Under Primary Phone, personal cell phones should be marked 'Home' under **Type**.

- Once complete click **Submit**.

Complete Federal Withholding Elections

- Click the link, [🌐 Edit Withholding Elections at CIC+] to complete this task. CIC+ is our third party online forms portal.

  TROUBLESHOOTING: If you get an error while trying to access the website, it may be because your birthdate and/or social security number have not yet been updated within Workday. Give it 24-48 hours and then try again.

- Verify your information and then click [Continue to Forms] .

- Click [Create] under Federal W-4 to complete all forms and designate your withholdings.

- Once complete, click **Submit to Employer** and close the internet browser window.

- Back in your Workday inbox, click **Submit** at the bottom of the **Complete Federal Withholding Elections** task. This verifies that you clicked the "Edit Withholding Elections at CIC+" button and completed your tax forms.

Payment Elections

- Enter your bank information under **Account Information.**

  HINT: This information can be found on a check or by contacting your bank.

- Once complete click **OK**

  TROUBLESHOOTING: If you do not currently have a bank account, change the **Preferred Payment Methods** to Check. This will need to be updated within the **Pay** worklet once you open an account.

Vehicle Information Questionnaire

- Designate if you will be driving a vehicle to work - (Yes) or (No). If you selected yes, enter a license plate for every vehicle you may drive to work, even if it will only be occasional.

  TROUBLESHOOTING: If you selected No for driving, you must enter 'N/A' in the comment box.

- Once complete click **Submit**.

Add Certifications (i.e., FBI & Child Abuse Clearances, CPR, RN & Physician Licenses, ARRT, etc.)

  HINT: If your position does not require certifications you can click **Submit** without entering anything.

  HINT: Required certifications are listed on the job profile. Contact your recruiter for clarification, if needed.

You must have an electronic version(s) of your certificate(s) to complete this step. If you **do not have** this available Submit the task blank. You can add certifications to your profile later.

If you **do have** an electronic version available now, follow these steps to upload it:

- Click [Add Certification] and type your name under **Person**. Click **OK**.

- Use the prompt icon ≡ to designate the type of **Certification** and then enter the **Certification Number**, **Issued Date** and **Expiration Date**.

- Click the expand icon ⟩ to upload a copy of your certificate. Press **Upload** to add another document to the same Certification. Click **Add** if you want to add additional certifications.

- Once complete click **Submit**.

Change Veteran Status Identification

- Use the prompt icon ≡ to designate your veteran status. Click **Submit** once complete.

  HINT: You can select "I do not wish to self-identify," if you'd rather not disclose this information.

Review Documents for Onboarding

- Click and review each document.

  HINT: Selecting 'I Agree' is your electronic signature verifying that you read and understand that you are accountable for content.

- Once all documents have been reviewed and 'signed', click **Submit**.

Step 3:

The Thursday prior to your scheduled New Employee Orientation, your Workday account will be disabled and you will be unable to access. During this time your candidate account will be transitioned to an employee account. You will regain access to Workday during orientation.

Benefits, including how to complete the enrollment task, will be reviewed during orientation. To get a head start, review the Benefits website prior to orientation at www.lghealthbenefits.com.

Benefit Change – New Hire/Rehire

HINT: This task will populate on your hire date, if you are eligible for benefits.

Dependents (people whom you will provide coverage for) must be added prior to completing this task. To add dependents follow these steps:

- From the Workday home screen, select the **Benefits** worklet. Under the Change section, click **Dependents**.

- Select **Add** and use the Edit icon to add dependent information. You must enter their name (must match the name on their social security card exactly), relationship to you, date of birth, gender, social security number or tax ID number, and address.

- Once complete, click **Submit**.

  HINT: Once you submit the dependent, you will receive a Review Documents for Dependent Event action in your inbox. This action item is for you to attach the required dependent documentation. The accepted documentation is outlined in the task.

To enroll (or decline) benefits follow these steps:

- Navigate to your Inbox by selecting the **Inbox** icon on the Workday home screen. Select the **Change Benefits for Life Event** (New Hire/Rehire) action from the list.

- Work your way through the benefit tiles to make your benefit elections.

  HINT: An HR Benefits representative will be email you step by step instructions and important dates regarding your benefits within one week of your start date. For questions after orientation, please reference the benefits website (www.lghealthbenefits.com), contact Trustmark (1-877-848-9997), or email the benefits team at LGH-Benefits@pennmedicine.upenn.edu

- When complete, click **Review and Sign,** followed by **Submit**.