Onboarding Checklist for Faculty and Staff Working in the U.S.

Welcome to Carnegie Mellon University! This document is for new hires, rehires, and ‘re-joiners’ starting or restarting a paid faculty or staff position. The first page of this document contains a list of steps that need to be completed to get started at CMU. The majority of these steps will be completed in Workday, CMU’s human resources system. The second page contains Frequently Asked Questions about onboarding. Please contact the CMUWorks Service Center with any onboarding questions.

1. **Workday Inbox Items – Part 1**
   - Complete all steps in Workday on or prior to your start date:
     - Review Documents – Intellectual Property, Workers’ Compensation Info
     - Complete Prior Affiliation Questionnaire (complete via link on Workday inbox item) and then click the “Submit” button in Workday
     - Enter Personal and Contact Information/Review Names (certain self-identification fields are required; all required fields must be complete to “Submit”)
     - Complete Form I-9, Section 1 of 2 (including your Social Security Number (“SSN”), unless you are Foreign National and you do not yet have your SSN)

   **Accessing Workday:**
   - Most individuals will receive two emails, which are sent to the provided personal email account, with a temporary username and password to access Workday to begin onboarding.
   - The Temporary Account Login is here: https://wd5.myworkday.com/cmu/d/home?redi
   - See the page 2, “Getting Started with Workday” section for more information. If you have questions about accessing Workday, contact the Service Center.

2. **Visit the CMUWorks Service Center**
   - By law, Section 2 of Form I-9 form must be completed within 3 days of your start date:
     - Visit the CMUWorks Service Center with original versions of your employment eligibility documents to complete Form I-9, Section 2
     - Provide Social Security Number (unless you do not yet have your SSN)
     - Receive First Pass Coupon and Andrew ID, if needed* (See the page 2, “About Your Andrew ID” section for more information. Contact the CMUWorks Service Center if you have questions regarding your Andrew ID access.)

   **CMUWorks Service Center**
   - 4516 Henry Street, Pittsburgh, PA 15213
   - I-9 Hours: 8:30-4:30 PM ET, M-F
   - Directions

   **Outside of Pittsburgh:**
     - Employees working at a Non-Pittsburgh campus should visit their Local HR Office with documentation and complete paper Form I-9.
     - Remote hires may complete Form I-9 with a notary.

3. **Workday Inbox Items - Part 2**
   - These items appear in your Workday Inbox shortly after completing Section 2 of Form I-9. **Complete in Workday within 30 days of your start date:**
     - Enter Emergency Contacts
     - Enter Payment Elections (Direct Deposit*)
     - Complete Federal, State and Local Tax Withholdings*
     - Complete Benefit Elections, if applicable*

   *An SSN is required for direct deposit set-up, for many benefit carriers, and for access to the electronic tax withholding forms.

4. **Next Steps**
   - After completing your Form I-9:
     - Complete any department specific onboarding (if available from department)
     - Get your CMU ID Card at The HUB with photo ID* (only on/after start date)
     - For New Faculty, attend Eberly Center’s Faculty Orientation *
     - For New Staff, attend New Hire Orientation *
     - Complete Workplace Harassment Training (you will receive an email from HR)
     - Review Carnegie Mellon’s Policies
     - Review Retirement Plans Notices and Information
     - For Faculty and Researchers, use the ORCID @ CMU application
     - If you are a Foreign National, provide information within our Foreign National Information System (See page 2 for more information)
     - If desired, complete the Authorization for Expense Reimbursement Direct Deposit Form (for Expense Reimbursement only)

   **Other Helpful Links:**
   - Benefit Programs
   - Campus Alert
   - Campus Map and Virtual Tour
   - CMU’s Directory
   - CMU’s United Way Campaign
   - Equal Opportunity Services
   - Information Security
   - Office of International Education
   - ORCID @ CMU FAQs
   - My Workday Toolkit
   - Parking Services
   - Payroll Resources
   - Professional Development Services
   - Retirement Savings Options
## Getting Started With Workday

Workday provides Carnegie Mellon University with a unified, global Human Resources, Payroll, Benefits and Time Tracking system. Workday guides and training materials are available at the [My Workday Toolkit](http://www.cmu.edu/cmuworks/).

### How do I log on to Workday?

How you access Workday depends on where you are in the onboarding process:

- **Most Onboarding Individuals** will access Workday for the first time with a temporary account provided in an email sent to their personal email account. Login to Workday using the URL listed in the email with the temporary account credentials provided: [https://wd5.myworkday.com/cmu/d/home.html?redirect=n](https://wd5.myworkday.com/cmu/d/home.html?redirect=n)

After your I-9 Form is processed in Workday and you have set up your Andrew Account, you will access Workday with your Andrew ID. The login to Workday with your Andrew ID is always located here: [http://www.cmu.edu/cmuworks/](http://www.cmu.edu/cmuworks/)

**Exception: Individuals moving from an Active Contingent Status to Employee Status** will access Workday with their existing Andrew credentials. The login to Workday link that can be used with your Andrew ID is always located here: [http://www.cmu.edu/cmuworks/](http://www.cmu.edu/cmuworks/)

### Getting Started With Workday

You can access most items that require your action with the Workday inbox which is on the top right corner of the Workday screen: click on the person image then select “Inbox” from the drop down menu.

## I-9 Form

### Why do I need to complete an I-9 Form?

The I-9 Form is federally required to verify the identity and employment authorization of each employee hired to work in the United States.

### Do I still need to complete an I-9 if I completed one previously?

Due to new federal regulations, all employees that are starting/restarting a paid position (after a period of time not in a paid position at CMU) must either complete a new Form I-9 or have the employer review an I-9 that was completed within 3 years of the return date. If you feel that you have a recent I-9 on file, contact the CMUWorks Service Center.

### What documents are required for onboarding?

Original versions of your documents are required and depend on your citizenship/immigration status. See the [List of Acceptable Documents](http://www.cmu.edu/cmuworks/) for more information.

## Your Andrew ID

### What is an Andrew ID or Andrew Account?

Your Andrew Account is your login account gateway to the computing environment at CMU. It is used to access the majority of CMU applications, including certain CMU webpages, your Andrew email, and Workday.

**I have never had an Andrew Account or I have an inactive Andrew Account. How do I set up my Andrew Account?**

After your I-9 Form is completed, the Service Center will communicate your Andrew ID and a temporary password via the First Pass Coupon. Once you receive your First Pass Coupon, go to First Pass [URL listed on the coupon](http://www.cmu.edu/cmuworks/) to set up your Andrew Account by creating a personal password.

## Payment Elections and Direct Deposit

### When can I set up Direct Deposit?

Completion of a recent I-9 form and your Social Security Number are required in order to set up direct deposit instructions in Workday. If direct deposit is not set up, payment will be made via paper check, which can be picked up at the CMUWorks Service Center during business hours with a photo ID.

**I previously had direct deposit with CMU. Why isn’t direct deposit automatically selected for me?**

Even if you have previously completed direct deposit elections or withholding elections at CMU, you must reelect these items for your own protection. Your information may have changed from the last time you had a position.

## Information for Foreign Nationals

The CMUWorks Service Center welcomes [Foreign Nationals](http://www.cmu.edu/cmuworks/), such as Non-Resident Aliens and Resident Aliens. As a Foreign National, you will be contacted by the Service Center via email regarding completing information online with our Foreign National Information System (FNIS) and Windstar. Without this information, we cannot provide you with applicable tax exemptions.

The [Office of International Education](http://www.cmu.edu/cmuworks/) also has resources for Foreign Nationals, including information for [applying for a Social Security Number](http://www.cmu.edu/cmuworks/).