Onboarding Information & Checklist for U.S. Faculty and Staff

Welcome to Carnegie Mellon University! This document is for new and re-hires. This document contains information and a list of steps that need to be completed to get started here at CMU. The majority of these steps will be completed in Workday, CMU’s unified, global, Human Resources, Payroll, Benefits and Time Tracking system. Please contact the CMUWorks Service Center with any onboarding questions.

---

**Steps for Setting up your Andrew Account**

Note if you already have an Andrew account and are actively using it, you may continue to do so. **No further action is required.**

**Step 1: Complete the prior affiliation questionnaire.** This questionnaire is used to identify whether or not you have had a previous relationship with the University. Please complete this brief survey using the following URL: [https://www.surveymonkey.com/s/priorcmu](https://www.surveymonkey.com/s/priorcmu).

**Step 2: Retrieve your Andrew account.** You will receive an email from Computing Services within 72 hours after you complete the prior affiliation questionnaire. The email will contain a link to a website where you will retrieve your Andrew account information. Please make note of your Andrew account as you will not be able to access this website again.

**Step 3: Set your Andrew account password.** Now that you have retrieved your Andrew ID, you will receive another email that will provide instructions for setting your password.

**Step 4: Register for Duo, the University’s two-factor authentication (2fa) system.** Once your Andrew account password has been set, you will be directed to enroll in two-factor authentication. Two-factor authentication is required for all faculty and staff within the University. It will help keep your Andrew account and the data you have access to secure.

---

**Getting Started With Workday Prior to Your First Day**

Your Andrew account is your gateway to the computing environment at Carnegie Mellon University. This account gives access to email, university systems, public computer labs and other resources. It is important that you complete the steps required to receive an Andrew account prior to your first day of work.

You should have received instructions for setting up your Andrew account in an email notification from Workday. If you have not completed the Andrew account set up process, please do so before attempting to login to Workday. If you need assistance using your Andrew account or enrolling in our two-factor authentication program, please contact Computing Services Help Center at 412-268-4357 (HELP) or [it-help@cmu.edu](mailto:it-help@cmu.edu).

**Getting Started and Accessing Workday:**

To get started using Workday, visit [http://www.cmu.edu/cmuworks/](http://www.cmu.edu/cmuworks/) and click on the “Workday Login” icon and enter your Andrew account information. You can access most tasks that require your action with the Workday Inbox Worklet.

*A digital accessible version of Workday can be accessed via the “Digital Accessibility Workday Login” icon.

**Complete all steps in Workday on or prior to your start date:**

- [ ] Review Documents – Intellectual Property, Workers’ Compensation Info
- [ ] 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).
1. **Visit the CMUWorks Service Center** 4516 Henry Street, Pittsburgh, PA 15213 (Hours: 8:30-5:00 PM ET, M-F) Directions

**BY LAW, ALL PAID EMPLOYEES MUST COMPLETE SECTION 2 OF FORM I-9 FORM WITHIN 3 DAYS OF YOUR START DATE. THERE ARE NO EXCEPTIONS:**

- Visit the CMUWorks Service Center with original versions of your employment eligibility documents to complete Form I-9, Section 2
- We ask that you please provide a Social Security Number (unless you do not yet have your SSN)
- **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 must complete Form I-9 with a notary.

**Q: Why do I need to complete an I-9 Form?**
A: The I-9 Form is federally required to verify the identity and employment authorization of each employee hired to work in the United States.

**Q: Do I still need to complete an I-9 if I completed one previously at CMU?**
A: All employees that are starting and/or restarting a paid position at CMU must either complete a new Form I-9 or have the employer review a previous Form 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.

2. **Additional Workday Inbox Tasks**

These items appear in your Workday Inbox shortly after completing Section 2 of Form I-9. You should complete these tasks within your first week.

- Enter Emergency Contacts
- Enter Payment Elections (Direct Deposit)*
- Complete Federal, State and Local Tax Withholdings*1
- Complete Benefit Elections, including retirement benefits (If eligible, You must complete this task in Workday within 30 days of your start date)**

*A SSN is required for direct deposit set-up and for access to the electronic tax withholding forms. Many benefit carriers also require a SSN. If you do not have one, follow these instructions to [Apply for a Social Security Number](#).

**If enrolling dependents, you must provide necessary Supporting Documentation within 30 days of your enrollment**

**Enrollment step is only for benefits eligible employees. If a benefits eligible employee does not elect benefits within 30 days of hire date, employee will be automatically enrolled in the default plan (default plans differ for full-time vs. part-time employees). See the [Benefits website](#) for additional information.**

1 If you are 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. For more information, please visit the Payroll Website and review the information for Foreign Nationals. The [Office of International Education](#) also has additional resources for Foreign Nationals.

3. **Next Steps (After completing your Form I-9)**

- See your department to complete any department specific onboarding tasks including access to additional systems and applications
- Get your CMU ID Card at The HUB with photo ID* (After start date)
- For New Faculty, attend Eberly Center’s Faculty Orientation*
- For New Staff, attend New Hire Orientation*
- Complete Workplace Harassment Training
- Review Carnegie Mellon’s Policies

*Individuals working outside of Pittsburgh should discuss these items with their Local HR Office*

**Other Helpful Links:**
- [Benefit Programs](#)
- [Campus Alert](#)
- [Campus Map and Virtual Tour](#)
- [CMU’s Directory](#)
- [Equal Opportunity Services](#)
- [Information Security](#)
- [Parking Services](#)
- [Payroll Resources](#) *(Andrew ID required)*
- [Professional Development Services](#)
- [Retirement Savings Options](#)