Employee Self-Service Guide

The following describes many of the self-service processes available in Workday. If you have any questions or encounter any errors contact Workday Customer Care (973-655-5000 option 3 or WCCSupport@montclair.edu).

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Workday Mobile

You will need the following information while setting up your Workday mobile application.

- **Company ID**: Montclair
  - *The company ID is case sensitive.*
- **Web Address**: https://wd1.myworkday.com

Installing the Workday Application

Get the Workday Mobile Application on your mobile device and set it up using the above information to access your account.
**ANDROID**

To install Workday on your Android device:

1) From your device, navigate to the Google Play Store.
2) Tap Search and enter Workday.
3) Tap Install.
4) Tap Open to launch the Workday application.
5) Tap the Let’s get started button.
6) Complete initial setup steps, including agreeing to license agreements and entering company settings.

**IPAD AND IPHONE**

To install Workday on your iPad or iPhone:

1) From your device, navigate to the App Store.
2) Enter “Workday” in the search field and select Workday from the search results.
3) Tap Get and Install.
4) Tap Open, once the app has downloaded.

**Note**: There are two methods in entering your company’s credentials for the Workday native app. This document will cover the Settings method, but feel free to attempt the intuitive mobile setup instructions through the app and use these instructions as a second option. If successful, skip corresponding setup instructions in this document.

5) Tap Settings and enter the Company ID/Tenant name (provided above).
6) Enter your company’s Workday web address (provided above) and tap Save.
7) Enter your Netid and password and tap Sign In.
8) Tap OK to enable push notifications.

**Change Workday Search Preferences**

The default Workday search preference is the Comment category. We suggest you change the default search category to All of Workday for better result.

1) Click on the cloud icon in the top right corner of your Workday homepage.
2) On the menu that appears, click My Account.
3) Click **Change Preferences**.

4) Scroll down to the section labelled Search Preferences. Default is New Workday Federated Search but can be changed to Classic Workday Search.

5) If Classic Workday Search is selected, select All of Workday in the Preferred Search Category prompt.
6) Click OK at the bottom of the screen. You have to sign out and sign back in for the changes to be applied.

**Configure My Shortcuts**

1) Click the **View All Apps** icon located in the Your Top Apps section of your homepage.

2) Click the **Add Shortcuts** button to add more shortcuts. Click the **Edit** to reorder or remove shortcuts.
3) Search for a task or report in the **Find Shortcuts** prompt. Once you select your task or report you can click the **Add** button to add to your menu.

![Add Shortcuts](image)

4) Click **Back to Menu** at the top when you are finished adding your shortcuts.

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### Add/Update Contact Information

**Important Information**

- All employees are required to have a home address, personal email address, and personal phone number listed under their HOME contact information.
- Your Primary Work Email needs to be your MSU email address. You can add additional work email addresses if necessary.
- Make sure that your HOME contact information is not listed under your WORK contact information.

1) From your homepage, click on the **Personal Information** worklet icon.
2) In the **Change** column on the left, click on the **Contact Information** button.
3) Click on the **Edit** button on the top left of the page.
4) To edit existing contact information, click the edit pencil icon to make changes.
5) To add new contact information, click the **Add** buttons located throughout the page.
6) When finished, click **Submit** at the bottom of the page.
Add/Update Emergency Contact Information

1) From your homepage, click on the **Personal Information** worklet icon.
2) In the **Change** column on the left, click on the **Emergency Contacts** button.
3) Click the **Edit** button if you are changing your existing emergency contact information or you need to add an alternate emergency contact.
4) Click the **Add** button if you are entering an emergency contact for the first time.

The following information is required for all emergency contacts.
- Legal Name
- Relationship
- Primary Address
- Primary Phone

5) When finished, click **Submit** at the bottom of the page.

Change Your Work Space (Office Location)

1) From your homepage, type **Change My Work Space** in the Workday search bar and select the task that appears.

![Change My Work Space Task]

2) Enter the effective date of the Work Space change. You cannot use a future date.
3) In the Work Space menu, select or search for your Work Space. You can select the menu options to find your work space or you can narrow down your search by typing your room number and hitting enter.

![Work Space Search]

**Note:** All work spaces are fed to Workday from Archibus. If you cannot find your work space you can open a Workday ticket by emailing WCCSupport@montclair.edu.
4) Click **Submit** at the bottom of the page.
Update Your Federal Tax Withholding Elections

1) From your homepage, click on the Pay worklet icon.
2) In the Actions column on the left, click on the Withholding Elections button.
3) Click the Update button at the bottom of the page.
4) Enter the effective date of the election change. You cannot use a date in the past.
5) Click OK at the bottom of the page. You will see the blank electronic form on the next page.
6) Carefully follow the instructions throughout the form before selecting the I Agree checkbox and clicking OK at the bottom of the page.

Note: If you choose to use the Multiple Jobs Worksheet on page 3 of the blank W-4 form you will be instructed to click on the View Blank Form button. Please allow up to five minutes for the form to generate.

Update Your State Tax Withholding Elections

1) From your homepage, click on the Pay worklet icon.
2) In the Actions column on the left, click on the Withholding Elections button.
3) Click on State Elections and then click Update at the bottom of the page.
4) Enter the effective date of the election change. You cannot use a date in the past.
5) Select New Jersey or Pennsylvania as the State.
   • For Pennsylvania residents, select New Jersey as the State.
     • In the Withholding Form Type field, select NJ-165 - Non-Resident Exempt.
     • Complete the NJ-165 - Non-Resident Exempt Form to not have NJ taxes withheld.
   • In addition, Pennsylvania residents must select Pennsylvania and complete the Pennsylvania residency certification form.

*Note: Residents of other states need to select New Jersey as the State for the NJ-W4.

6) Click OK at the bottom of the page. You will see the blank electronic form on the next page.
7) Click on the View Blank Form button. Please allow up to five minutes for the blank form to generate.
8) Use the guidance on the generated blank W-4 form to fill out the electronic form in Workday.
9) Click the I Agree checkbox before clicking OK at the bottom of the page.
Update Your W-2 Printing Elections

1) From your homepage, click on the Pay worklet icon.
2) In the View column on the right, click on the My Tax Documents button.
3) Review your current printing election and click the Edit button to change your election.

4) Select one of the two options displayed.
   a. Receive electronic copy of my Year End Tax Documents
      OR
   b. Receive both electronic and paper copies of my Year End Tax Documents

5) Click the OK button.
6) Click the Done button. The process is now complete. You will be returned to your My Tax Documents page where your new elections will be displayed.

View/Print Payslips

1) From your homepage, click on the Pay worklet icon.
2) In the View column on the right, click on the Payslips button.
3) Find the pay period you want to view and click the View button to the right.
4) Click the print icon located at the top right of the screen.

5) A window will pop up. Click Download. Your payslip will download as .pdf that you can print.
Add Worker Documents

1) From your homepage, click on the **Personal Information** worklet.

![Personal Information Worklet](image)

2) In the **View** column on the right, click on the **Worker Documents** button.

3) Click the Add button.

![Add Worker Documents](image)

4) You can drag and drop your document into the grey area that appears or you can select the **Select files** button to search for the document on your device.
5) Select a Document Category.
6) (Optional) Write a comment for the document.
7) (Optional) Click the trash can icon to delete the document.
8) (Optional) Click the Upload button to add another document.

9) Click OK at the bottom of the screen.

Help Contact Information
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