Guide to Onboarding in Workday

To access a list of the actions (tasks) you must complete, click on the cloud in the upper right corner. Select Inbox.

IMPORTANT: Vassar staff members are not permitted to give individual tax advice. We suggest that you review the IRS website, consult a parent, and/or seek professional advice from a qualified accountant or attorney.

1. Complete Federal Withholding Elections (W-4)

Have questions? Refer to the IRS website: https://www.irs.gov/faqs/irs-procedures/w-4-allowances-excess-fica-students-withholding/w-4-allowances-excess-fica-students-withholding
2. Complete State and Local Withholding Elections

Which withholding form do I select?
The most commonly used forms are outlined below.
For detailed information and to view these forms with full instructions, please visit: https://www.tax.ny.gov/forms/withholding_cur_forms.htm

I am not a NY state resident (IT-2104.1):
New York IT-2104.1 Data

Am I Exempt?
Per the IRS, to claim exemption from withholding for NY state income tax you must meet these conditions:
- you must be under age 18, or over age 65, or a full-time student under age 25; and
- you did not have a New York income tax liability for 2016; and
- you do not expect to have a New York income tax liability for 2017 (for this purpose, you have a tax liability if your return shows tax before the allowance of any credit for income tax withheld).

I am a NY state resident and exempt from withholding for NY State income tax:
New York IT-2104-E Data

What is percent of services?
The percent of services performed in New York State or Yonkers may be computed using days, miles, time, or similar criteria. For example, an individual working in New York State two out of five days for the entire year performs 40% of his or her services in New York State.
I am a NY state resident and expect to have income tax liability (IT-2104):

New York IT-2104 Data

<table>
<thead>
<tr>
<th>Marital Status</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident of New York City</td>
<td>☐</td>
</tr>
<tr>
<td>Resident of Yonkers</td>
<td>☐</td>
</tr>
<tr>
<td>Work in Yonkers</td>
<td>☐</td>
</tr>
<tr>
<td>New York State and Yonkers Allowances</td>
<td>0</td>
</tr>
<tr>
<td>New York City Allowances</td>
<td>0</td>
</tr>
<tr>
<td>New York State Additional Amount</td>
<td>0.00</td>
</tr>
<tr>
<td>New York City Additional Amount</td>
<td>0.00</td>
</tr>
<tr>
<td>Yonkers Additional Amount</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Legal Notice:

Your Name and Password are considered as your “Electronic Signature” and will serve as your confirmation of the accuracy of the information being submitted. When you click in the “I Agree” checkbox, you are certifying that:

1. Under penalties of perjury, you declare that you have examined this certificate and to the best of your knowledge and belief, it is true, correct, and complete.
2. You understand that your payroll tax withholding election is a legal and binding transaction.
3. You understand that all submissions are contingent upon acceptance by your Payroll representative.

If you do not wish to use the electronic signature option, please contact your Payroll Department for a paper copy of the form.

The form is not valid without a signature.

I certify that I am entitled to the number of withholding allowances claimed on this certificate.

I Agree [☐]

3. Payment Election Enrollment Event (Direct Deposit):

Manage Payment Elections

5 day(s) ago

Worker

Default Country: United States of America
Default Currency: USD

Preferred Payment Method

- Payroll: Direct Deposit
- Expense: Direct Deposit

Account Setup

Worker

Sample Check

Direct Deposit Fast Facts:

- All onboarding actions must be completed IN FULL in order for direct deposit to work
- After enrolling it takes one complete pay cycle to pass before direct deposit takes effect. Your first paycheck will be a paper check.

Account Information

Account Nickname (optional)

Account Type

- ✔ Checking
- ○ Savings

Bank Name

Routing Transit Number

Account Number
### 4. Review Documents:

#### Review Documents for Onboarding

**5 day(s) ago - Effective 09/21/2017**

**Documents**

<table>
<thead>
<tr>
<th>Document Link</th>
<th>Instructions</th>
<th>Signature Statement</th>
<th>I Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Handbook</td>
<td>Please click the link below to download a copy of the Student Handbook.</td>
<td>I acknowledge that I have received and reviewed the Student Handbook.</td>
<td></td>
</tr>
<tr>
<td>Vassar College Regulations</td>
<td>Please click the link above to view or download a copy of the Vassar College Regulations</td>
<td>I acknowledge that I have received and reviewed the Vassar College Regulations</td>
<td></td>
</tr>
<tr>
<td>Employee Confidentiality Agreement</td>
<td>Please click the link above to download a copy of Vassar College's Employee Confidentiality Agreement</td>
<td>I acknowledge that I have received and reviewed the Employee Confidentiality Agreement</td>
<td></td>
</tr>
</tbody>
</table>