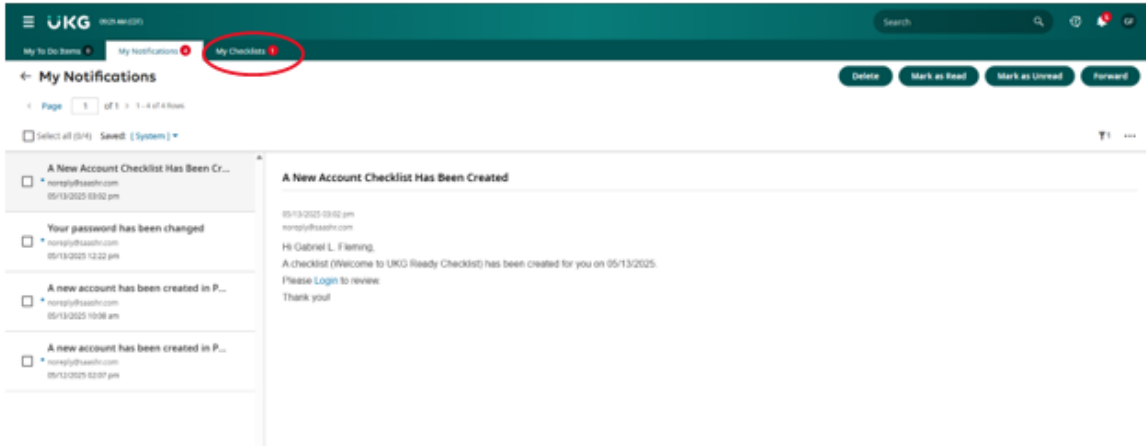
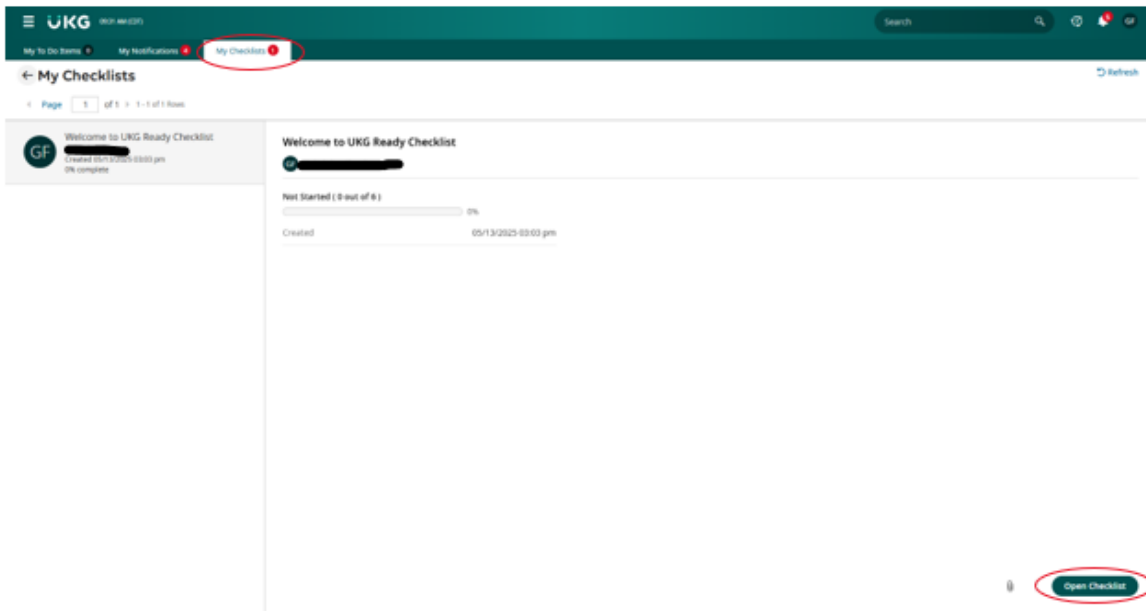


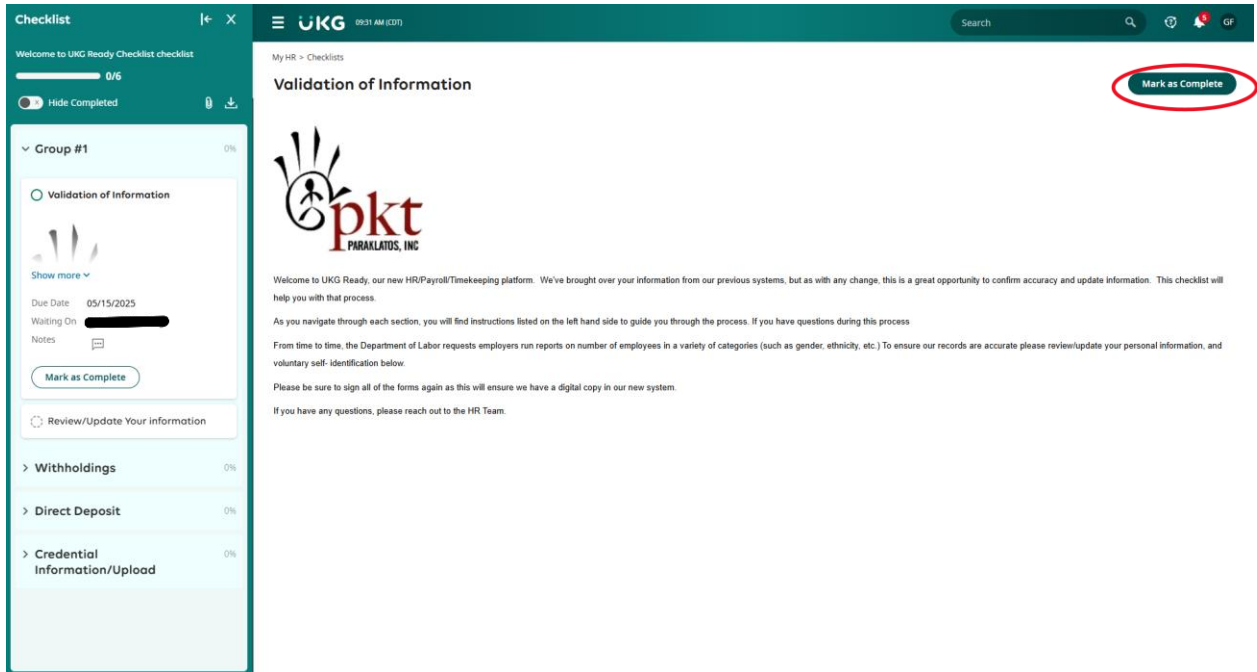
# How To Complete Your First-Time Setup



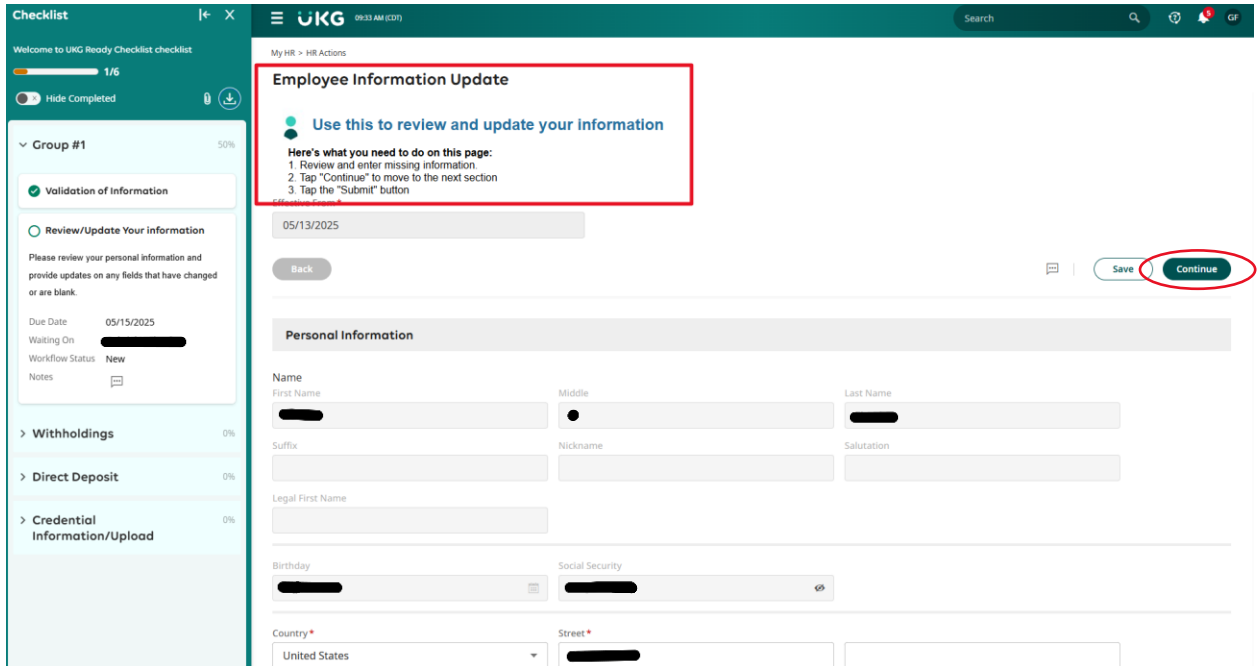
Please see the top left corner for the “My checklist” section.



Click on “my checklist” in the top left corner



Checklist Introduction please make sure you are clicking on “mark complete” on the top right of the screenshots.



Checklist

Welcome to UKG Ready Checklist checklist

1/6

Hide Completed

Group #1 50%

- Validation of Information
- Review/Update Your information

Please review your personal information and provide updates on any fields that have changed or are blank.

Due Date: 05/15/2025  
Waiting On: ██████████  
Workflow Status: New  
Notes: [icon]

Withholdings 0%

Direct Deposit 0%

Credential Information/Upload 0%

My HR > HR Actions

### Employee Information Update

Use this to review and update your information

Here's what you need to do on this page:

1. Review and enter missing information.
2. Tap "Continue" to move to the next section
3. Tap the "Submit" button

Effective From \*

05/13/2025

Back Save Continue

#### Voluntary Self-Identification

Actual Marital Status: Single | Gender: Male

Ethnicity: White (not Hispanic or Latino)

Veteran: Are You A Protected Veteran: No, I Am Not a Protected Veteran

Disability: I Do Not Wish to Answer

Checklist Item #1 part 2

## Add Account Contact



Primary Contact

Contact type

Emergency  Dependent  Beneficiary

Salutation

First Name \*

Middle

Last Name \*

Suffix

Relationship \*

Other

Code

United States (+1)

Work Phone

Primary

Code

United States (+1)

Home Phone

Primary

Code

United States (+1)

Cell Phone

Primary

### National ID

Primary National ID

Social Security Number

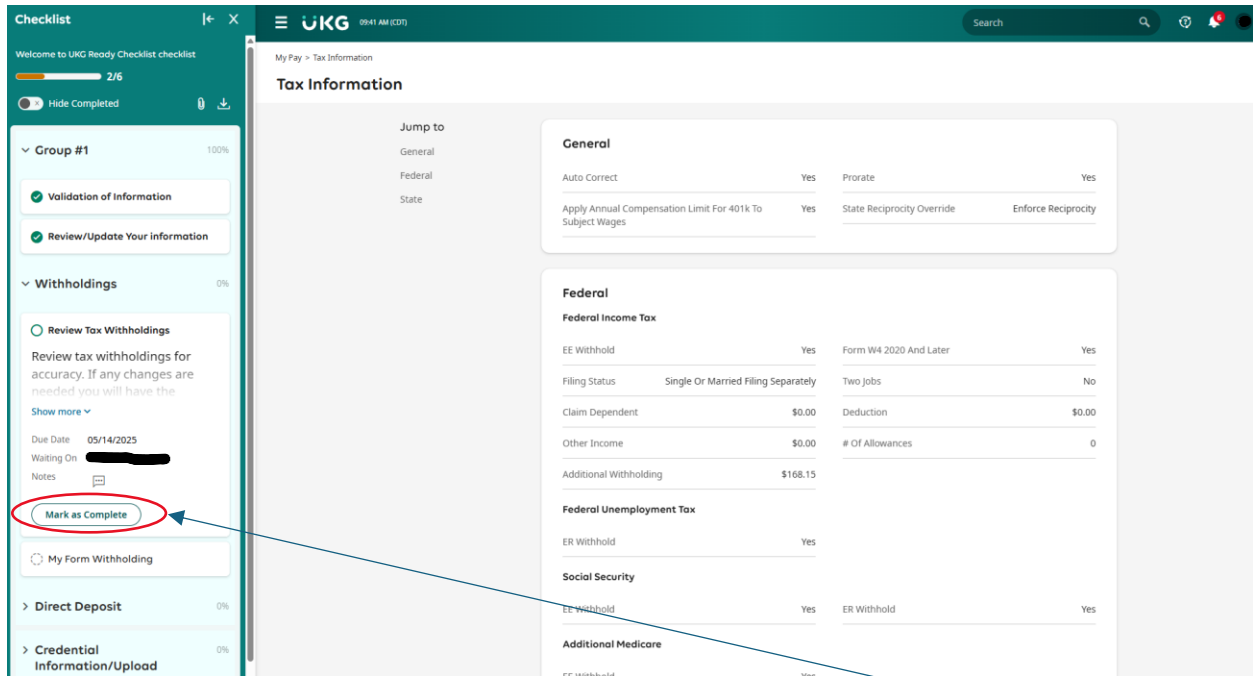
999-99-9999

Email

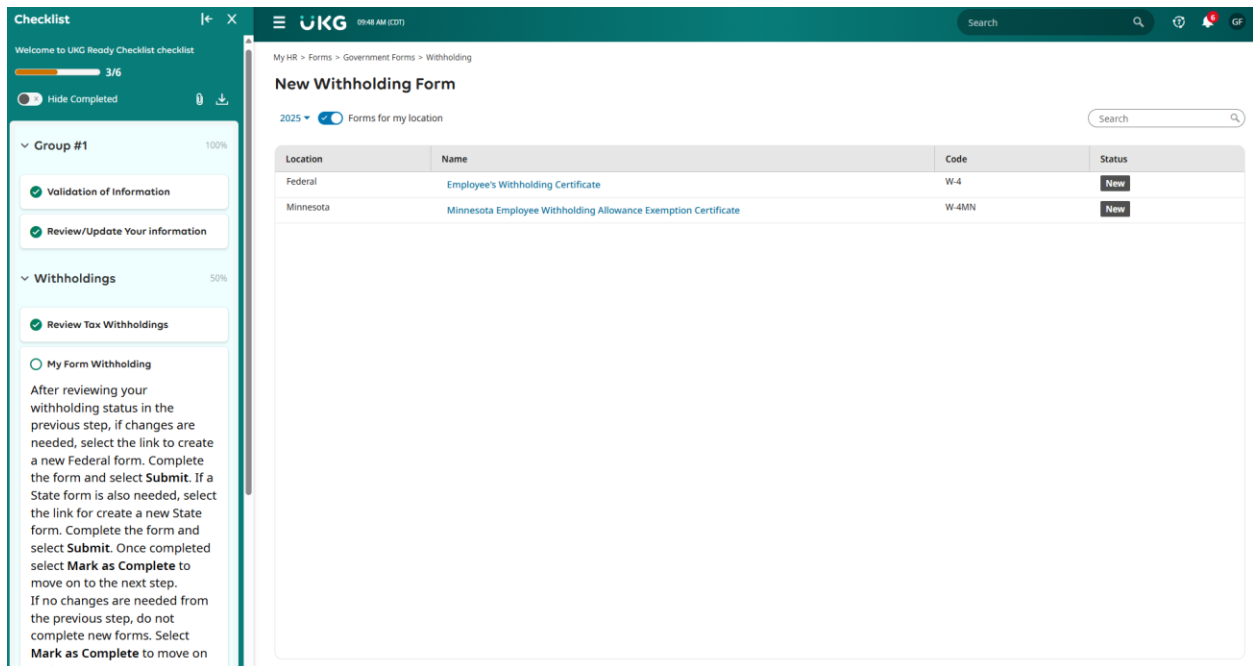
Account ID

--

Checklist item #1 part 2 - Adding account contact/emergency contact



Checklist Item #2 part 1 – payroll withholding information (also known as a W4) (note- there is no “confirm” or “save” button on this page, so you have to hit the “**mark as complete**” button on the left ribbon)



Checklist item #3 part 1 – see instructions on left ribbon. Again, there is no “**submit**” button. Must use the “Mark as complete” button on left ribbon.

## W-4 (Federal Employee's Withholding Certificate)

Save Review ...

Status: New

### Instructions

#### Department of the Treasury Internal Revenue Service

Forms W-4  
OMB No. 1545-0074  
2025

[Detailed instructions \(PDF\)](#)

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Give Form W-4 to your employer. Your withholding is subject to review by the IRS.

Required fields are marked with an asterisk (\*).


### Step 1. Enter Personal Information

(A) First name *	Middle Initial	Last Name *
<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to <a href="http://www.SSA.gov">www.SSA.gov</a></small>		
Street *	<input type="text"/>	
Zip *	City *	<input type="text"/>
<input type="text"/>	Minneapolis	
State *	<input type="text"/>	
Minnesota		

## Minnesota: W-4MN

Download PDF Submit Save

Status: New



**2025 W-4MN, Minnesota Withholding Allowance/Exemption Certificate**

**Employees**  
Complete Form W-4MN so your employer can withhold the correct Minnesota income tax from your pay. Consider completing a new Form W-4MN each year and when your personal or financial situation changes. If no Form W-4MN is in effect, the number of withholding allowances claimed will be zero.

First Name and Initial	Last Name	Social Security Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Permanent Address	Marital Status (Check one):	
<input type="text"/>	<input type="radio"/> Single; Married, but legally separated; or Spouse is a non-resident alien	
City	State	ZIP Code
<input type="text"/>	MN	<input type="text"/>
<input type="radio"/> Married		
<input type="radio"/> Married, but withhold at higher Single rate		

**Complete Section 1 OR Section 2, then sign the bottom and give the completed form to your employer.**

**Section 1 — Determining Minnesota Allowances**

A Enter "1" if no one else can claim you as a dependent ..... A

B Enter "1" if any of the following apply: ..... B

- You are single and have only one job
- You are married, have only one job, and your spouse does not work
- Your wages from a second job or your spouse's wages are \$1500 or less

C Enter "1" if you are married. Or choose to enter "0" if you are married and have either a working spouse or more than one job. (Entering "0" may help you avoid having too little tax withheld.) ..... C

D Enter the number of dependents (other than your spouse or yourself) you will claim on your tax return. .... D

E Enter "1" if you will use the filing status Head of Household (see instructions). .... E

F Add steps A through E, if you plan to itemize deductions on your 2024 Minnesota income tax return, you may also complete the Itemized Deductions and Additional Income Worksheet. .... F

1 Minnesota Allowances. Enter Step F from Section 1 above or Step 10 of the Itemized Deductions Worksheet. .... 1

2 Additional Minnesota withholding you want deducted for each pay period (see instructions) ..... 2 \$

**Section 2 — Exemption From Minnesota Withholding**  
Complete Section 2 if you claim to be exempt from Minnesota income tax withholding (see Section 2 instructions for qualifications). If applicable, check one box below to indicate why you believe you are exempt:

A I meet the requirements and claim exempt from both federal and Minnesota income tax withholding

B Even though I did not claim exempt from federal withholding, I claim exempt from Minnesota withholding, because:

- I had no Minnesota income tax liability last year
- I received a refund of all Minnesota income tax withheld
- I expect to have no Minnesota income tax liability this year

C All of these apply:

- My spouse is a military service member assigned to a military location in Minnesota

**Checklist** | Welcome to UKG Ready Checklist checklist | 4/6 | Hide Completed

**Group #1** 100%

- Validation of Information
- Review/Update Your Information

**Withholdings** 100%

- Review Tax Withholdings
- My Form Withholding

**Direct Deposit** 0%

- Direct Deposit

Review your direct deposit account information in this step and check for accuracy. If any [Show more](#)

Due Date: 05/14/2025  
Waiting On: [Redacted]  
Workflow Status: New  
Notes: [Icon]

### Update My Direct Deposit

Use this to add your direct deposit

**Here's what you need to do on this page**

1. Tap "+ Add" in the middle of the page
2. Skip Name
3. Skip Description
4. Pick the date you want the direct deposit change to start, it has to be the day after you cancelled the current direct deposit
5. Skip Active To (leave at Dec 31, 2099)
6. Deposit Type needs to be "Direct Deposit"
7. Choose Bank Account Type
8. Choose Calculation Method

If you want your whole paycheck deposited into one bank account, choose "Entire/Remainder"  
For all other calculation methods, you must enter more than 1 bank account and choose "Entire/Remainder" for the last bank account entered

9. Type your bank account number twice and your routing number
10. Tap the "Save" button

Use this to change your direct deposit

**Here's what you need to do on this page**

1. Tap the pencil icon next to the direct deposit you want to cancel
2. In "Active To", pick the date you want the direct deposit to end
3. Tap the "Save" Button

Then follow the steps above to add your new direct deposit account.

Effective From \*  
05/14/2025

Direct Deposit Information

Direct Deposits

+ Add

No Direct Deposits Defined

Save Submit

Checklist Item #4 part 1 – Please add your direct deposit information.

## Add New Direct Deposit



Name	Description
<input type="text" value="Enter Name"/>	<input type="text" value="Enter Description"/>
Active From *	Active To *
<input data-bbox="217 495 800 558" type="text" value="05/14/2025"/>	<input data-bbox="824 495 1408 558" type="text" value="12/31/2099"/>
Deposit Type	Bank Account Type *
<input data-bbox="217 621 800 684" type="text" value="Direct Deposit"/>	<input data-bbox="824 621 1408 684" type="text" value="Checking"/>
Calculation Method *	
<input data-bbox="217 747 800 810" type="text" value="Entire/Remainder"/>	
Account # *	Reenter Account # *
<input data-bbox="217 894 800 957" type="text"/>	<input data-bbox="824 894 1408 957" type="text"/>
ABA # / Bank Routing # *	
<input data-bbox="217 1020 743 1083" type="text"/>	

Checklist Item #4 – part 2 – enter your new Direct Deposit information – **Please make sure this is correct as this is how you will get paid**



**Update My Credentials**  
 Here's what you need to do on this page:  
 1. Enter your credential information that applies to your position:  
 • Driver's license  
 • Auto Insurance Information  
 • Select add for each individual item and add all information pertaining to each specific document (including expiration date)  
 • Upload an image of the document (front and back if applicable)  
 2. Tap the "Submit" button

Effective From \*  
 05/14/2025

My Credentials

Credentials

Active (1) | Expired (0) | All (1) + Add

Document #	External ID	Issued	Expires	Schedulable	Actions
Driver License (1)		11/09/2023	02/09/2026	No	...

Upload Documents

Checklist Item #5 part 1 – updating driver’s license information

## Add New Credential X

Credential Type

Driver License

Active

Document # \*

Issued

mm/dd/yyyy

Expires \*

mm/dd/yyyy

Class

State \*

Choose State

Restrictions

Cancel Save

Checklist Item #5 part 2 – adding new driver license information

## Add New Credential



Credential Type

Auto Insurance ▼

Active

Document # \*

This is your policy number on your insurance card

Issued \*

mm/dd/yyyy

Expires \*

mm/dd/yyyy

Issuer/Policy Holder \*

Agent Contact Number \*

Agent Contact Email \*

Cancel

Save

Checklist Item #5 part 3 – Please add your auto insurance