

ONBOARDING TASKS

Here's how to complete the tasks in your onboarding inbox. Please note, the tasks may be completed in any order.

IMPORTANT: If you have questions or comments throughout this process, please contact the appropriate University office listed for the task. Please do not use the comment box.

ONBOARDING – FINANCIAL RESPONSIBILITY AGREEMENT

If you have questions about this portion of the process, please contact Student Financial Services (SFS) at (781)-891-3441 or SFS@bentley.edu.

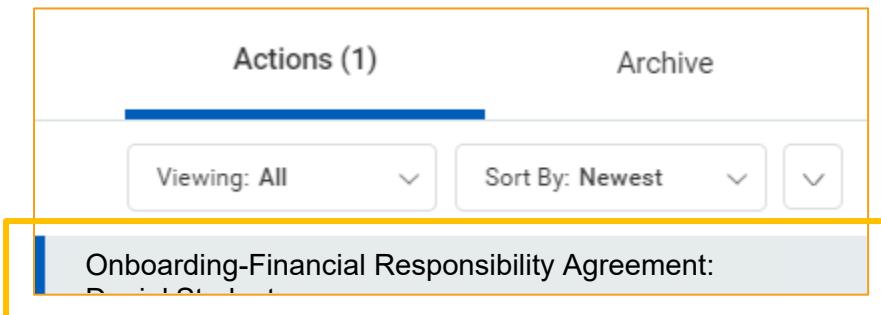
STEP 1

After logging in to Workday, click the **Inbox** icon in the top right corner next to the **Notification** (bell) icon.



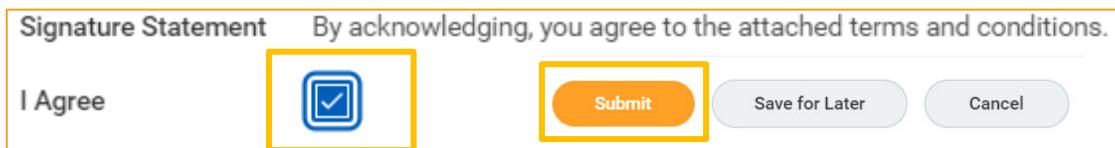
STEP 2

To begin, click **Onboarding – Financial Responsibility Agreement**. This will start the sequence to complete all necessary Onboarding tasks.



STEP 3

Read the **Financial Responsibility** then click the **I Agree** checkbox and click **Submit**.



STEP 4

To continue the onboarding progress, click **Open**.

Review My Home Contact Information

Open

> Details and Process

CONSENT FOR REMOVAL FROM 1098-T MASS PRINT

If you have questions about this portion of the process, please contact SFS at (781) 891-2162 or GA_SFS@bentley.edu.

STEP 1

Under **Consent for Removal from 1098-T Mass Print**, check the box indicating **Yes, I have read and consent to the terms and conditions** and then click **Submit** at the bottom of the page.

Consent for Removal from 1098-T Mass Print

Yes, I have read and consent to the terms and conditions

Submit **Cancel**

STEP 2

Click **Done**.

Done

ADD EMERGENCY CONTACTS

If you have questions about this portion of the process, please contact the Office of the Dean of Student Affairs at (781) 891-2161.

STEP 1

Under **Complete To Do**, click **Actions**. Then click **Add Emergency Contact**.

Complete To Do **Add Emergency Contacts**

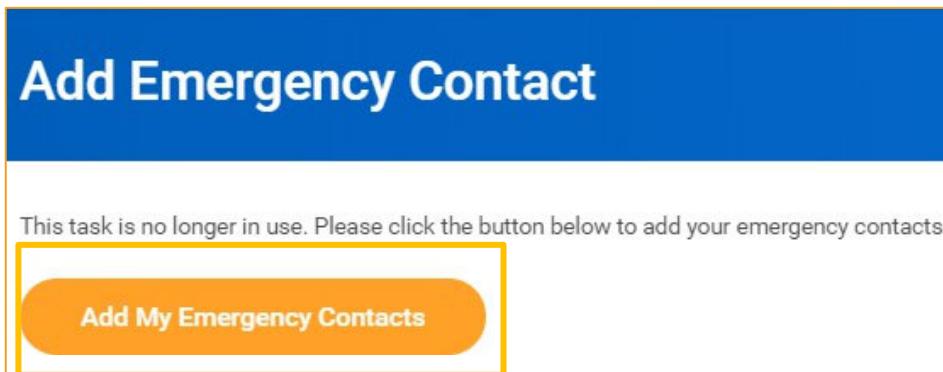
Actions

Add Emergency Contact



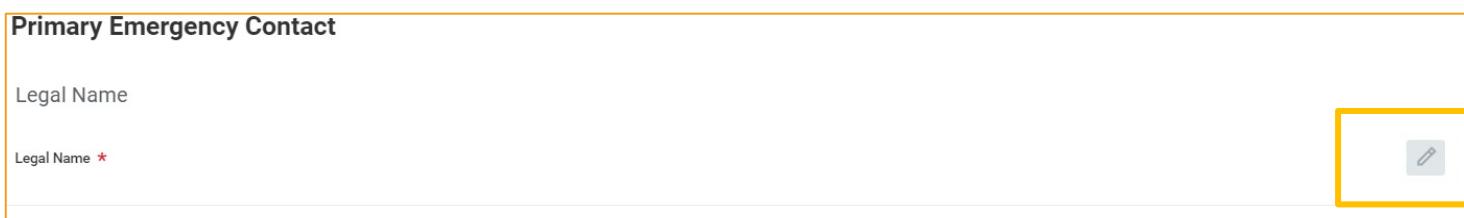
STEP 2

On the **Add Emergency Contact** screen, click **Add My Emergency Contacts**.



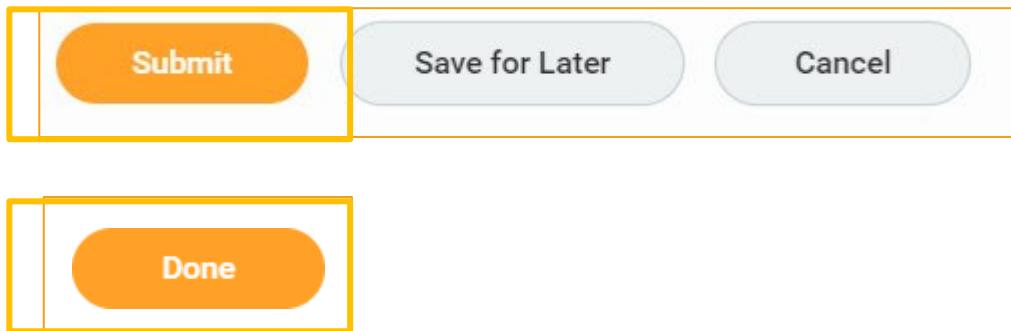
STEP 3

Your **Primary Emergency Contact** information may be prepopulated. If so, review it for accuracy. To enter new or change existing contact information, click the **Pencil** icon to the right or the task bar below the requested information line.



STEP 4

When finished, click **Submit** and then **Done**.



COMPLETE QUESTIONNAIRE: STUDENT TITLE IV CREDIT AUTHORIZATION (BP2)

If you have questions about this portion of the process, please contact SFS at (781) 891-2162 or GA_SFS@bentley.edu.

STEP 1

Under **Complete Questionnaire 'Student Title IV Credit Authorization (BP2)',** read and review the statement regarding institutional charges and financial aid authorization. Then, select either **Yes – I authorize**, or, **No – I do not authorize** by clicking on the respective bubbles to the left of the options.

Complete Questionnaire 'Student Title IV Credit Authorization (BP2)'

Yes - I authorize
 No - I do not authorize

STEP 2

Click **Submit**.

Submit **Save for Later** **Close**

REVIEW MYDEGREE

If you are a new student, you may ignore the Review My Degree steps.

If you have questions about this portion of the process, please contact the Registrar's office at (781) 891-2177 or registrar@bentley.edu.

STEP 1

Under **Complete To Do – Review MyDegree**, click **Degree Works** in the **Related Links** table.

Complete To Do Review MyDegree

Related Links 1 item	
Related Link DegreeWorks	Link Description Please Review your DegreeWorks Audit



STEP 2

After reviewing the information in Degree Works, go back to Workday and click **Submit** at the bottom of the page.

Submit

Save for Later

Close

REVIEW MY HOME CONTACT INFORMATION

If you have questions about this portion of the process, please contact the Office of the Dean of Student Affairs at (781) 891-2161.

STEP 1

Under **Review My Home Contact Information**, confirm that the entered information is accurate. If you need to make any changes, click **Edit**.

Review My Home Contact Information

12 day(s) ago

Edit

Address	Usage	Visibility	Shared With	Effective Date

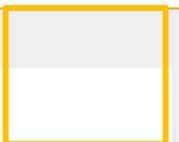
Email Address	Usage	Visibility

STEP 2

Click the **X** icon, **Pencil** icon, or **Add** to edit your information.

Change Home Contact Information

Address



Primary

Yes added

Address

18 Parker Dr, North Reading, MA 01864-3015

Usage

(empty)

Visibility

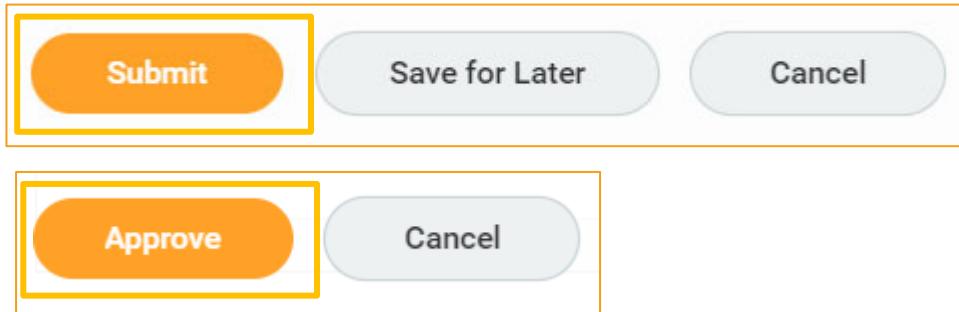
Private

Add



STEP 3

When you are done, click **Submit** and then **Approve**.



REVIEW MY PERSONAL INFORMATION

If you have questions about this portion of the process, please contact the Office of the Dean of Student Affairs at (781) 891-2161.

STEP 1

Under **Review My Personal Information**, confirm that the entered information is accurate. If you need to make any changes, click **Edit**.



The form is titled 'Review My Personal Information' and shows the following data:

12 day(s) ago	
Edit	
Personal	
Gender	Male
Date of Birth	04/15/1999
Age	20 years, 1 months, 13 days
Marital Status	(empty)
Hispanic or Latino	<input type="checkbox"/>
Race/Ethnicity	White (United States of America)
Citizenship Status	Citizen (United States of America)



STEP 2

Under **Change Personal Information**, click the **Pencil** icon and update your information.

Change Personal Information



STEP 3

When you are done, click **Submit** and then **Approve**.

Submit

Save for Later

Cancel

Approve

Cancel

