

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.

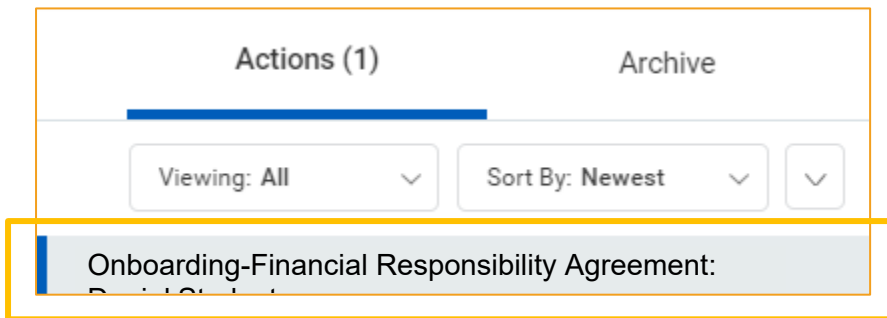
STEP 1

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**.

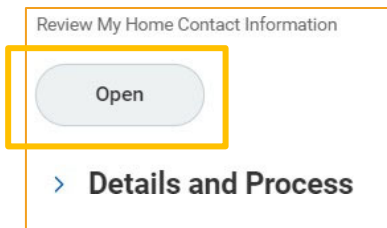
Signature Statement By acknowledging, you agree to the attached terms and conditions.

I Agree ☒



STEP 4

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

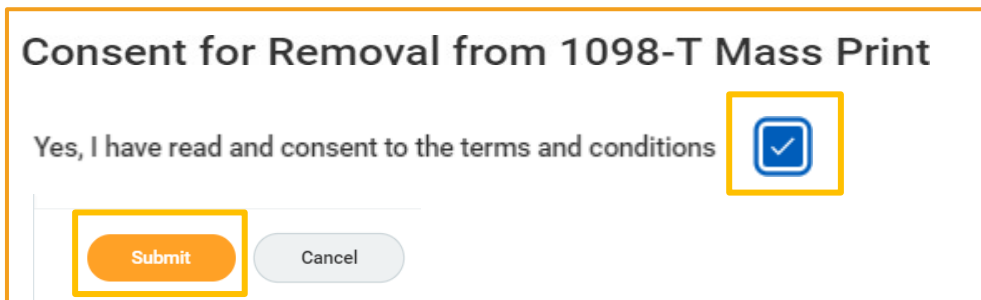


CONSENT FOR REMOVAL FROM 1098-T MASS PRINT

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.



STEP 2

Click **Done**.

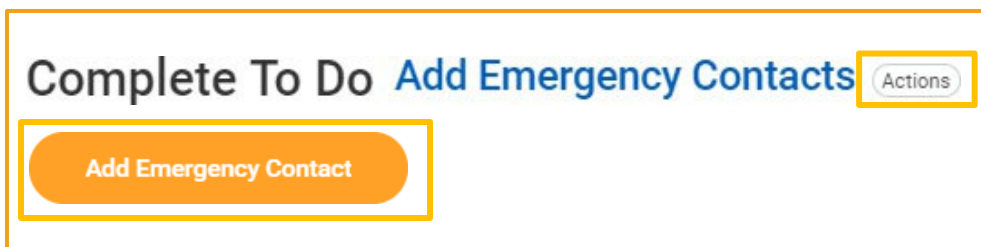


ADD EMERGENCY CONTACTS

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

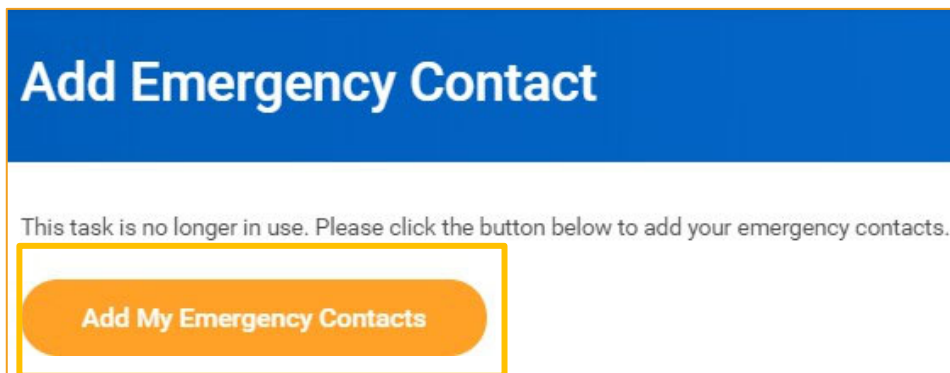
STEP 1

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



STEP 2

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



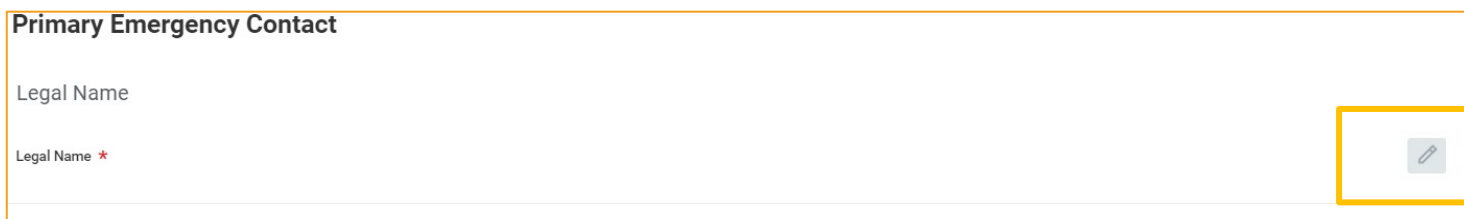
Add Emergency Contact

This task is no longer in use. Please click the button below to add your emergency contacts.

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.



Primary Emergency Contact

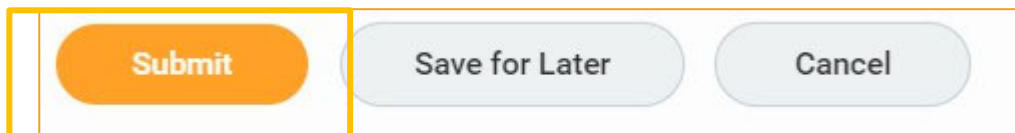
Legal Name

Legal Name *

Pencil icon

STEP 4

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



Submit Save for Later Cancel



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	Link Description
DegreeWorks	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.



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**.

The screenshot shows the "Review My Home Contact Information" page. At the top left, it says "12 day(s) ago". Below this, there is a button labeled "Edit" which is highlighted with an orange border. The page contains two tables. The first table has columns: Address, Usage, Visibility, Shared With, and Effective Date. The second table has columns: Email Address, Usage, and Visibility. Both tables show one item each.

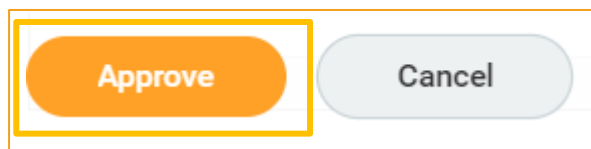
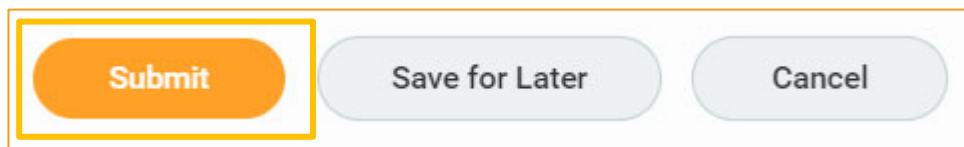
STEP 2

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

The screenshot shows the "Change Home Contact Information" page. It has a header bar with the title. Below the header, there is a section for "Address" with a "Primary" toggle set to "Yes" and a sub-section for "Address" containing the text "18 Parker Dr, North Reading, MA 01864-3015". Below this is a "Usage" section with the text "(empty)" and a "Visibility" section with the text "Private". At the bottom, there is an "Add" button highlighted with an orange border. In the top right corner, there is a box containing an "X" icon and a pencil icon.

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**.

Review My Personal Information

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**.

