

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 – TERMS & CONDITIONS

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

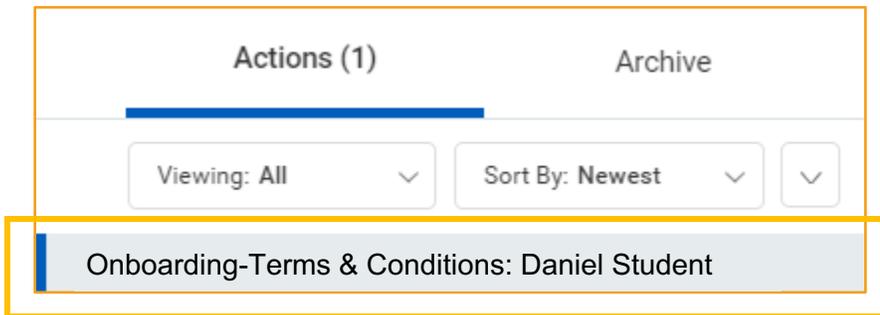
STEP 1

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



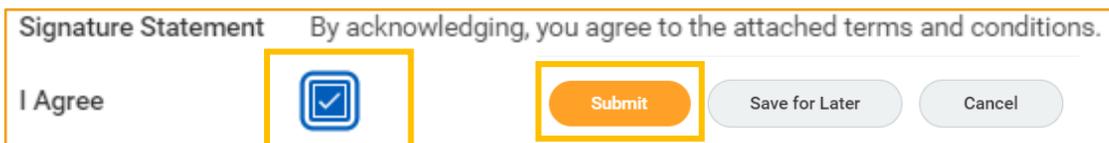
STEP 2

To begin, click **Onboarding – Terms & Conditions**. This will start the sequence to complete all necessary Onboarding tasks.



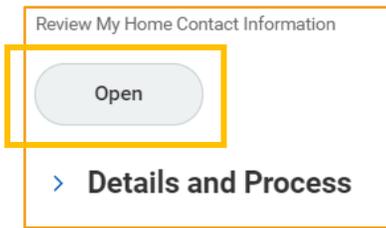
STEP 3

Read the **Financial Terms & Conditions** and the **Terms & Conditions of Payment Obligations** instructions. Then click the **I Agree** checkbox and click **Submit**.



STEP 4

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

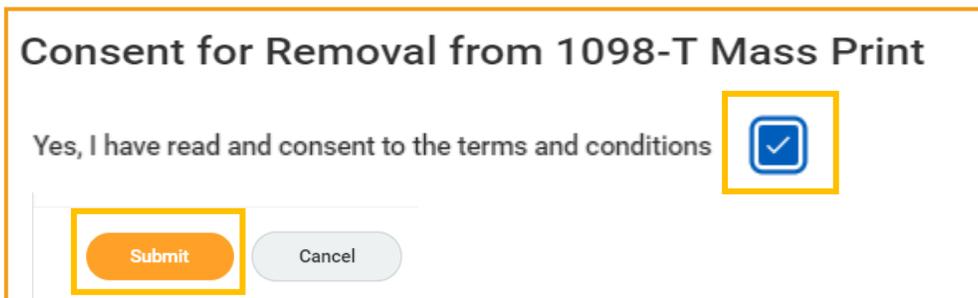


CONSENT FOR REMOVAL FROM 1098-T MASS PRINT

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**.

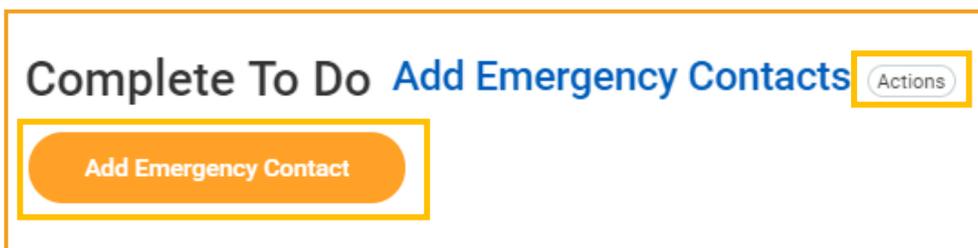


ADD EMERGENCY CONTACTS

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

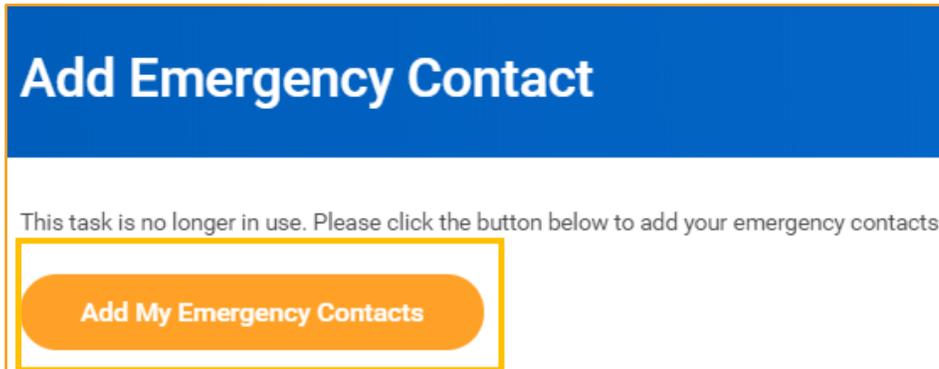
STEP 1

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



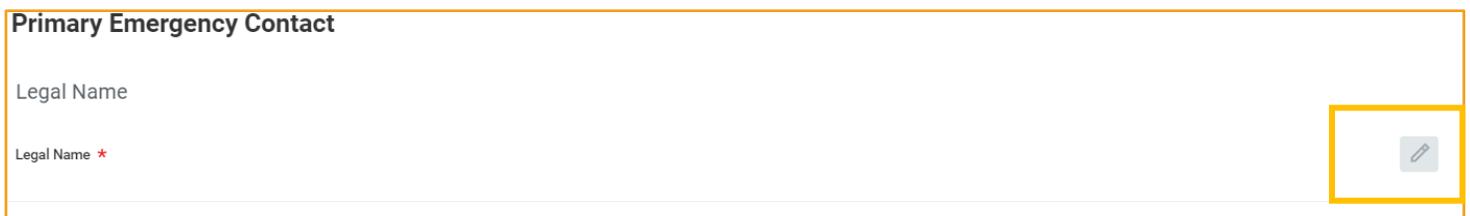
STEP 2

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



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 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**

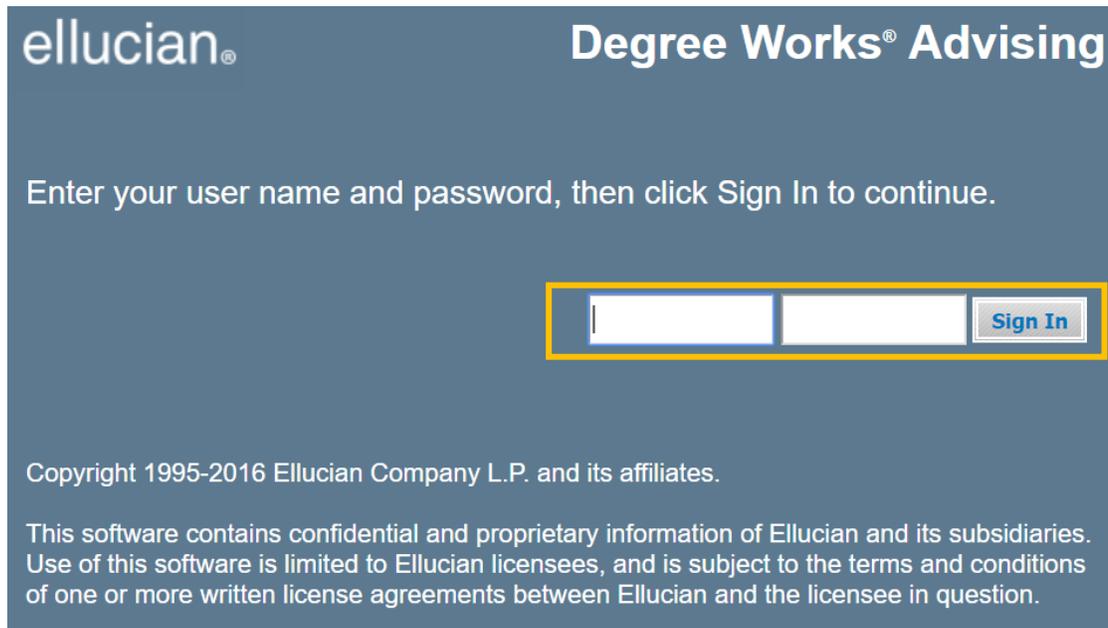
Related Link	Link Description
DegreeWorks	Please Review your DegreeWorks Audit



STEP 2

Enter your Bentley ID and Degree Works password into **ellucian Degree Works Advising** and click **Sign In**.

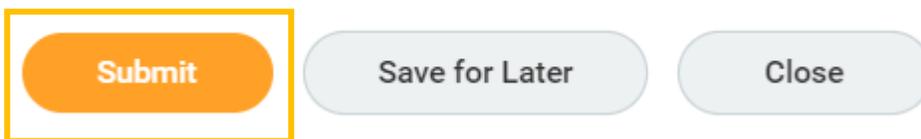
Tip: Your Degree Works password is your first and last initial capitalized, then \$, followed by your Bentley ID without the B. For example, if you were logging in as Harry Bentley, whose Bentley ID is B06798761, the username in the first entry field box would be B06798761 and the password in the second entry field box would be HB\$06798761. Please change your password if this is your first time logging in.



The screenshot shows the login interface for ellucian Degree Works Advising. At the top left is the 'ellucian' logo, and at the top right is the text 'Degree Works® Advising'. Below the header, a message reads: 'Enter your user name and password, then click Sign In to continue.' Underneath this message are two input fields for username and password, followed by a 'Sign In' button. The entire login area is enclosed in a yellow rectangular border. At the bottom of the page, there is a copyright notice: 'Copyright 1995-2016 Ellucian Company L.P. and its affiliates.' and a disclaimer: 'This software contains confidential and proprietary information of Ellucian and its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and the licensee in question.'

STEP 3

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



Three buttons are shown horizontally. The first button is orange with the text 'Submit' in white and is highlighted with a yellow border. The second button is light gray with the text 'Save for Later' in gray. The third button is light gray with the text 'Close' in gray.

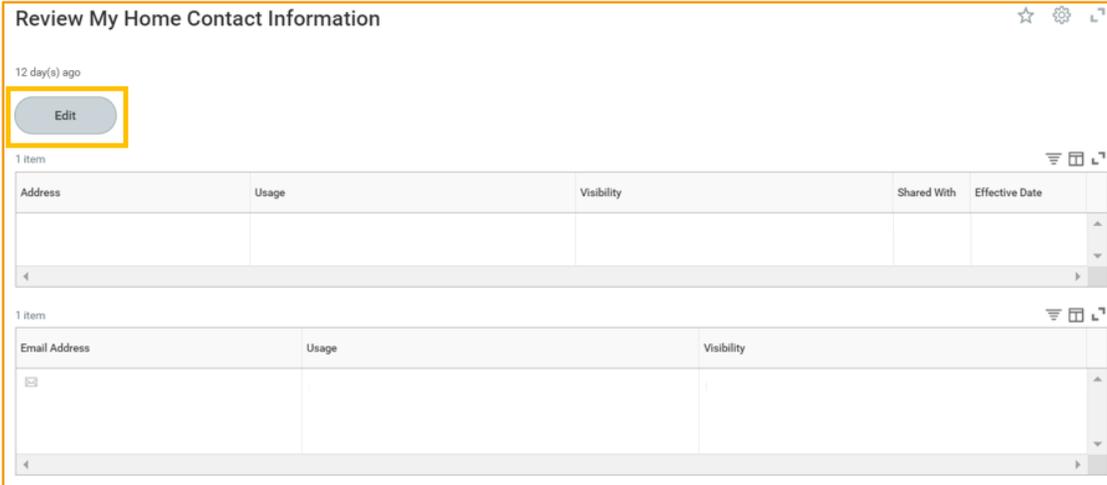


REVIEW MY HOME CONTACT INFORMATION

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

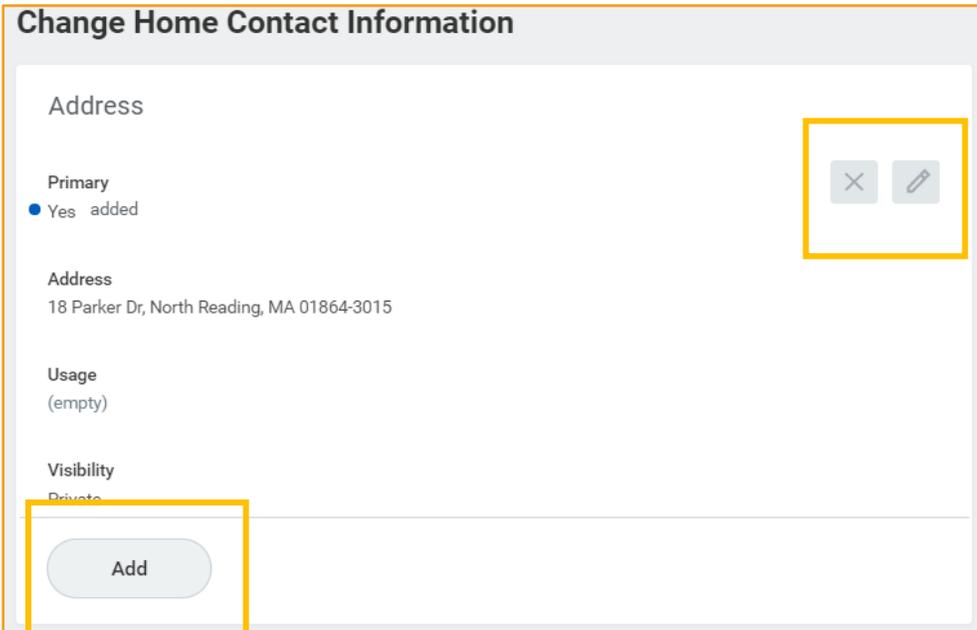
Under **Review My Home Contact Information**, confirm that the entered information is accurate. If you need to make any changes, click **Edit**.



The screenshot shows the 'Review My Home Contact Information' interface. At the top left, it says '12 day(s) ago'. Below this, there is a button labeled 'Edit' which is highlighted with a yellow box. The interface contains two tables. The first table has columns for 'Address', 'Usage', 'Visibility', 'Shared With', and 'Effective Date'. The second table has columns for 'Email Address', 'Usage', and 'Visibility'. Both tables are currently empty.

STEP 2

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



The screenshot shows the 'Change Home Contact Information' interface. It displays the following information:

- Address**
- Primary**
 Yes added
- Address**
18 Parker Dr, North Reading, MA 01864-3015
- Usage**
(empty)
- Visibility**
Private

At the bottom left, there is a button labeled 'Add' which is highlighted with a yellow box. At the top right, there are two icons: an 'X' icon and a pencil icon, both of which are also highlighted with a yellow box.

STEP 3

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

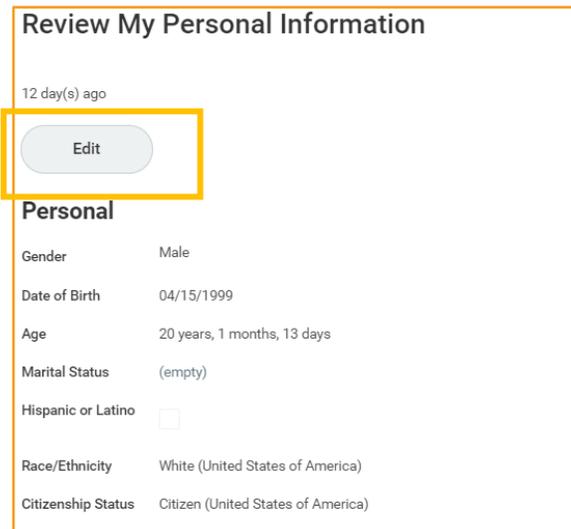


REVIEW MY PERSONAL INFORMATION

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**.



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**.

