Onboarding Tasks for New Graduate Students

Onboarding with Workday Student

As a new graduate student at Wake Forest University, you are required to complete a variety of required onboarding tasks in Workday. This guide demonstrates how to complete your required onboarding tasks. The onboarding process consists of a series of actions, to-dos, document reviews, and questionnaires.

Onboarding Tasks

1) To begin, log in to Workday at workday.wfu.edu

2) To view all onboarding tasks, click the My Tasks icon in the top right corner of your Workday homepage, or in the **Awaiting Your Action** section of the homepage, click the **Go to My Tasks** link.

3) Note each Onboarding item in your My Tasks list. To begin the onboarding process, click to open the Welcome Message. The tasks may include:

Welcome Message

Review and Agree to Wake Forest University Account Responsibility and Past Due Accounts

Review My Personal Information

Manage My Privacy Settings

Review My Friends and Family

Technology Requirements

Review Ethical Computing Policy

Add Payment Elections

Consent to Receive Form 1098-T Electronically

Update SSN or ITIN

Federal Student Aid Authorizations Self-Service

Final Official Transcript Required

Welcome Message

1) The Welcome Message displays all onboarding tasks and instructions. You may click the **Overall Process** link to view a table of all tasks, and proceed to complete them, or you may click through each task as it is displayed on the left, in your **My Tasks**.
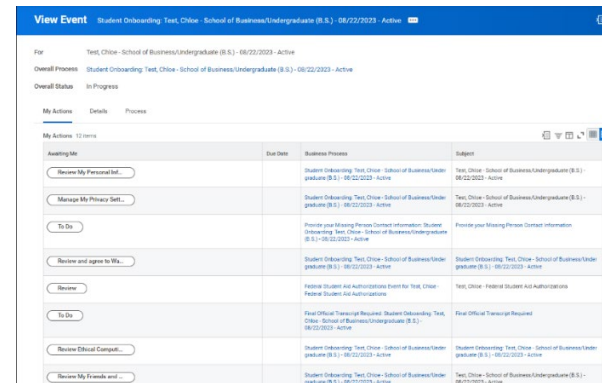
Review and Agree to Wake Forest University Account Responsibility and Past Due Accounts

1) Click to open the **Wake Forest University – Account Responsibility and Past Due Accounts Policies** PDF file.

2) Read the document in full, then check the box next to **I Agree**.

3) Click **Submit**.

Review My Personal Information

1) To complete this task, scroll through your personal information listed on the right. To add or update any information, click the **Edit** button at the top.

2) Click the pencil icon in any/all of the individual fields to make the necessary changes to your home address, phone number, email, etc.

   a) Please note that **Legal Gender**, **Date of Birth**, and **Citizenship Status** are required.

   b) Documentation proof must be uploaded in the Attachments field at the bottom of the page if editing or updating **Date of Birth**, **Sex**, or **Citizenship Status**.

3) When finished editing each field, click the check mark icon to the right to save your changes.

4) Click **Submit**.

5) Once your edits have been submitted, click **Approve** on the task in your **My Tasks** list.

Manage My Privacy Settings

1) Please read this task carefully. This task allows you to determine if your information may be shared outside of Wake Forest. Please note the recommended options.

2) When finished, click **Submit** to complete the task.

Review My Friends and Family

1) Please read this task and its requirements carefully.

2) This task requires contact information for friends and/or family in the event of an emergency or for *proxy access. (See step 9 to learn more about proxy access.) If there are contacts listed, review and click **Actions** > **Edit Friends and Family** to update if needed, or **Actions** > **Remove Friends and Family** to remove. If there are no contacts listed or if you wish to add more, click the **Add** button.
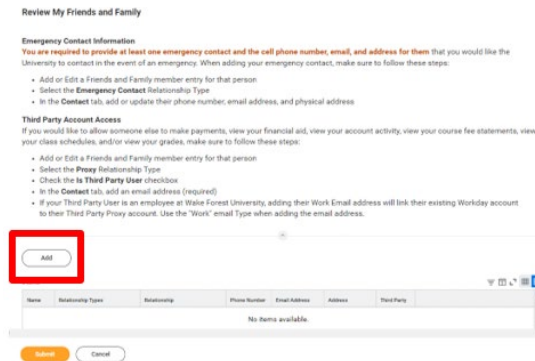
3) On the **Add My Friends and Family** page, note the required fields. From the **Select a Relationship Type** field, choose from the menu options. Please note that you may select multiple relationship types for one person. At least one person must have the **Relationship Type of Emergency Contact**.

4) *If you wish to allow family and friends to perform actions such as **paying bills**, **viewing financial aid**, **viewing your class schedule**, **viewing your account activity**, etc., check the box next to **Is Third Party User**.

Important: Access for financial activities will be available in early July 2024. Providing Third Party permissions now will allow seamless access to view account activity and make payments. Any account activity prior to 7/1/24 should still be viewed and paid via DEAC.

5) From the **Name** tab below, enter the contact's **Country**, **First Name** and **Last Name**.

6) Click the **Contact Information** tab to enter the person's **Phone**, **Address**, and **Email information**. This must be completed in order to submit the task.

7) When finished, click **OK**.

8) If you have granted **Third Party User** access to a Friend or Family member as outlined in step 3, you will be alerted to an additional task requiring you to grant permissions to the third-party user.

9) Click **Done**.

10) To grant permissions for your third-party user, in the table that now displays your Friends and Family, click to expand the **Actions** button on the far right, then select **Manage Permissions for My Third Party**.

11) Follow the prompts, checking the appropriate boxes to allow your Third Party User access to specific tasks. When finished, click **OK**.

Note: Some tasks when selected will display additional permissions that may be allowed.

Task Name	Description	Additional Permission
Make a Payment	Allows the third party to make payments on behalf of the student	Allow third party to receive past due balance notifications

View Account Activity	Allows the third party to view account transactions (charges, payments, financial aid, refunds) and Due Now details and payment plans	
View Student Statement	Allows the third party to access the student's statement without course information	Allow third party to see the course information on the statement
View Current Classes	Allows the third party to access the student's currently registered courses	
View Student Grades	Allows the third party to access the student's grades	
Generate Unofficial Transcript	Allows the third party to generate an unofficial transcript	

12) Enter a **Purpose of Waiver**, such as "*my parent/guardian will handle all financial matters on my behalf*," when prompted, then check the box next to **Confirm**.

13) Click **Submit** to complete the waiver.

14) Click **Submit** to complete the onboarding task.

Technology Requirements

1) Read this task carefully. All students are expected to have a personal laptop computer. (Exact specifications are dependent upon your chosen academic program.)

Complete To Do   Technology Requirements   ...

For   Test, Lucy - School of Professional Studies/Graduate (CERT) - 08/26/2024 - Active

Overall Process Student Onboarding: Test, Lucy - School of Professional Studies/Graduate (CERT) - 08/26/2024 - Active

Overall Status   In Progress

Instructions   All incoming graduate students are expected to arrive on campus with a personal laptop computer. The exact specifications of which may differ depending on specific academic program requirements. Please review the appropriate link(s) and confirm that you agree to purchase or own a device that meets the minimum requirements outlined:

Law Computer Requirements
Graduate School Arts and Sciences Computer Requirements
Graduate School of Business Computer Requirements

[Submit] [Save for Later] [Close]

2) Click the appropriate link in the task to review your school's requirements.

3) When finished, return to the task, then click **Submit**.

Review Ethical Computing Policy

1) Click to open and read the **Policy on Responsible and Ethical Use of Computing Resources** document attached in the task.

2) Return to the task, then check the box next to **I Agree**.

Review Ethical Computing Policy
Review Documents for Student Onboarding: Test, Johnny - School of Arts and Sciences/Undergraduate (B.A.) - 08/26/2024 - Active   ...

Documents

Document	Policy on Responsible and Ethical Use of Computing Resources
Instructions	Please acknowledge that you have reviewed the Policy on Responsible and Ethical Use of Computing Resources.
Signature Statement	I acknowledge that I have read the Policy on Responsible and Ethical Use of Computing Resources
I Agree	☐

[Submit] [Save for Later] [Cancel]

3) Click **Submit** to complete the task.

Add Payment Elections

1) This task allows students to set up direct deposit methods for student account refunds, adjustments to charges, prepayments, financial aid disbursements, and overpayments.

2) To begin, click the **Payment Elections** button.

Complete To Do   Add Payment Elections.   ...   ☆ ▣ ▦ ⚙ ⤢

3 month(s) ago

Direct deposit is the preferred method of payment for student account refunds. Adjustments to charges, prepayments, financial aid disbursements and overpayments often result in credit balances on student accounts. Signing up for direct deposit provides you with a fast, convenient and secure way to access your funds. Direct deposit provides significant benefits over paper checks. You no longer need to wait for a check to arrive in the mail or stand in line at the bank or check-cashing service to obtain your refund.

For   Rehman, Abdul - Computer Science/Undergraduate (B.S./B.A.) - 01/08/2022 - Active

Overall Process Continuing Student Onboarding for: Rehman, Abdul - Computer Science/Undergraduate (B.S./B.A.) - 01/08/2022 - Active

Overall Status   In Progress

Instructions   To add your direct deposit information please click on "**Payment Elections**" below and choose payment elections and **add**.

[Payment Elections]

[Submit] [Save for Later] [Close]

3) If you have already added bank accounts, please review the details to ensure accuracy. Click **Edit** or **Remove** to update details if necessary. If you have not yet added bank accounts,

click the **Add** button.

4) Select your preferred payment method (for refunds from Wake Forest University, student employment wages, etc.) from the required **Expense Payment** and **Student Refund Rule** fields.

5) Select the **Account Type**. Complete the required fields: **Routing Transit Number**, **Account Number**, and **Bank Name**.

6) Click **OK**, then click **Submit** to complete the task. (See also: Manage Bank Account for Refunds-Payment Elections for additional information.)

Consent to Receive Form 1098-T Electronically

1) If you would prefer to receive your 1098-T tax form electronically via Workday, check the box next to **Yes, I have read and consent to the terms and conditions**. By checking this box, you agree to only receive an electronic form. This is a printable (to PDF) form.

2) When finished, click **Submit** to complete the task.

Update SSN or ITIN

1) If needed, you may see the **Update Social Security Number or Individual Taxpayer Identification Number** task. Please read the instructions carefully.

2) To enter your social security and/or your individual taxpayer identification number, click the **Change My Government IDs** button.

3) Again, read the instructions carefully, and keep in mind that **documentation is required** to verify new SSN and ITIN changes.

(A list of acceptable documents is provided.)

4) To add a **National** and/or **Government ID**, click the plus sign in the respective table to create a new row. Note the required fields.

5) In the **Attachments** field, upload one or more of the required acceptable documents.

6) When finished, click **Submit**.

7) Click **Submit** again to complete the onboarding task.

Federal Student Aid Authorizations Self-Service

1) Review the contents of this task, noting that you may authorize Wake Forest University to use your Federal Student Aid to pay for non-institutional charges.

2) Check the box next to **I Authorize**.

3) Click **Submit** to complete the task.

Final Official Transcript Required

1) This task requires final official transcripts from all degree-granting institutions you previously attended. Refer to the matriculation requirements from your program for transcript submission instructions.

2) When finished, click **Submit**.