

# 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](http://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](#)

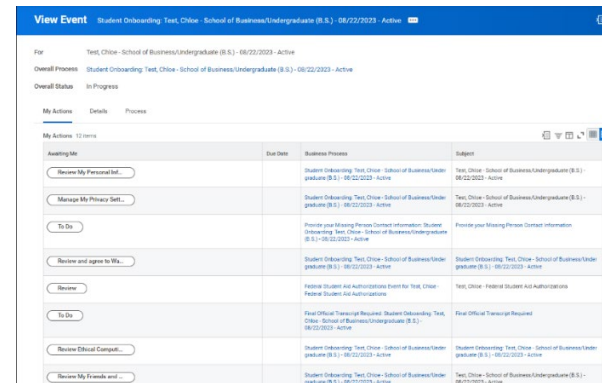
[Update SSN or ITIN](#)

[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**.

Created 03/19/2024

### Review and agree to Wake Forest University Account Responsibility and Past Due Accounts Policies

Review Documents for Student Onboarding: Test, Chloe - School of Business/Undergraduate (B.S.) - 08/22/2023 - Active

**Documents**

Document: Wake Forest University - Account Responsibility and Past Due Accounts Policies

**Instructions**  
Please review the attached document containing Wake Forest University's Account Responsibility and Past Due Accounts policies. A student hold preventing registration will be active on your account until you have completed this and the other required steps in My Tasks.

**Signature Statement**  
I have reviewed the attached document containing Wake Forest University's Account Responsibility and Past Due Accounts policies. I understand that a student hold preventing registration will be active on my account until I complete this and the other required onboarding steps in My Tasks.

I Agree

Comment:

Submit Save for Later Cancel

- 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.

**Edit**

**Personal**

Sex

Date of Birth 04/10/2005

Age 19 years, 0 months, 0 days

Country of Birth (empty)

Marital Status (empty)

Hispanic or Latino

Approve Cancel

- 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.

### Manage My Privacy Settings

Student Test, Chloe

Institution Wake Forest University

Description Please visit our [website](#) for more information about FERPA and directory information.

I consent to share my information outside of this institution (recommended)  
 I don't consent to share my information outside of this institution

I want my directory information to be public (recommended)  
 I don't want my directory information to be public

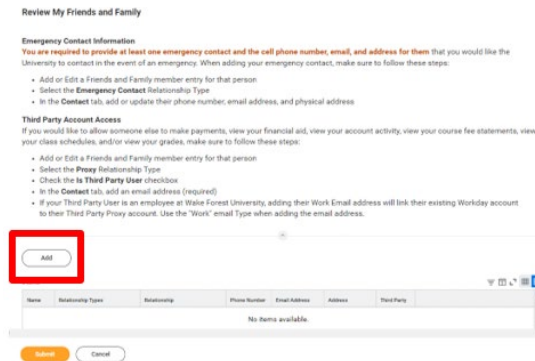
If students elect to be included in the Public Student Directory, their Name, Pronouns, Phonetic Pronunciation, Audio Pronunciation, Photo, Institution, and Social Media links are always public by default.

Submit Cancel

- 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.

### Alerts

1. **Is Third Party User**  
You must still grant permissions to this third-party user. After you complete this task, access the Manage Permissions for Third Party task that displays on your Friends and Family profile group.
2. **Page Alert**  
Run the task to manage permissions for third-party users in order for them to receive their login instructions, account information, and notifications.

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 View Student Statement

Description This task gives access to view a student's statement without courses on the student's behalf.

Allowed

Description This option displays courses that the student is charged for on the student statement.

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

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

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

**Instructions for ITIN and SSN Changes**

In the National IDs section of this page you can add or edit your SSN and ITIN information. If you are an international student and do not have an ITIN, you can find more information on the process to obtain one at the website for the [International Students Office](#) or by contacting them by email at [internationalstudentoffice@wakeforest.edu](mailto:internationalstudentoffice@wakeforest.edu) or phone at (919) 856-6800. If you do not have an SSN or ITIN saved in Workday, add a new row to the National ID section using the plus button in the top left corner of the table. Select United States of America in the Country column and then select either SSN or ITIN in the National ID Type column. Please add your ID information in the following columns.

A document is required to verify new ITIN and SSN changes. Please use the Attachments section at the bottom of the page to upload your document.

**SSN and ITIN Document Requirements**

Acceptable SSN documents:  
You can prove your SSN using one of the documents below. The document you submit must have your current legal name. Documents you can use include:

- U.S. Social Security card
- DD-14 with full SSN
- W-2 with full SSN
- W-2 Form with full SSN (including W-2C, W-2S, etc.)
- SSA-1099 Form with full SSN (including SSA-1099-BM, SSA-1099-CPT, etc.)
- Non-SSA 1099 Form with full SSN (including 1099-DIV, 1099-MISC, etc.)
- 1098 Form with full SSN (including 1098-C, etc.)
- Bank, loan, or financial documents with full SSN
- Pay stub with full SSN

**Unacceptable SSN documents**

Tax forms that you complete yourself, such as Form 1042, are not acceptable as proof of your SSN. Name change documents also aren't accepted.

**ITIN Document Requirements**

Acceptable ITIN documents:

- Passport

After attaching your document search for the Government IDs (Student) document category. This is critical in securing your document. After selecting this category hit Submit.

National IDs 1 item									
*Country	*National ID Type	Current ID	Add/Edit ID	Issued Date	Expiration Date	Issued By	Series	Set Verification To Current User	Verification Due
United States of America	Social Security Number (SSN)	XXX-XX-XXXX		02/14/2003				<input type="checkbox"/>	04/10/2024

Government IDs 1 item							
*Country	*Government ID Type	Identification #	Issued Date	Expiration Date	Set Verification To Current User	Verification Date	Verified By
United States of America	Voter's Registration Card	123456789123	03/01/2024		<input type="checkbox"/>	04/10/2024	

Submit Save for Later Cancel

- When finished, click **Submit**.
- Click **Submit** again to complete the onboarding task.

**Federal Student Aid Authorizations Self-Service**

- 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.
- Check the box next to **I Authorize**.

**Make My Federal Student Aid Authorizations**

Federal Student Aid Authorizations

Student: Test, Sarah  
 Institution: Wake Forest University  
 Expires After: Lifetime  
 Signature Statement: I authorize this institution to use my Federal Student Aid to pay for non-institutional charges.  
 I Authorize:

enter your comment  
  
 Submit Cancel

- Click **Submit** to complete the task.

**Final Official Transcript Required**

- 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.

**Complete To Do** Final Official Transcript Required

For: Test, Sarah - Women's, Gender, and Sexuality Studies/Undergraduate (B.A.) - 08/26/2024 - Active

Overall Process: Student Onboarding: Test, Sarah - Women's, Gender, and Sexuality Studies/Undergraduate (B.A.) - 08/26/2024 - Active

Overall Status: In Progress

Instructions: As a condition of admission and enrollment, each student is required to submit a final official transcript from all degree-granting institutions. Official transcripts must include all final grades, the name of the degree earned and the date the degree was conferred. Paper transcripts must be in a sealed envelope and mailed directly from the granting institution. Wake Forest cannot obtain transcripts from any school, including Wake Forest, without the direct request from the student. All transcripts must be sent directly from the issuing university.  
 For Students with International Transcripts: If required, transcripts should be translated into English with the originals sealed and attached. If required, an independent credential evaluation must be submitted.  
 Refer to matriculation requirements from your program for transcript submission instructions.

Submit Save for Later Close

- When finished, click **Submit**.