

Go Live Workday Student - Onboarding Guide

Onboarding with Workday Student

Use this guide to complete your Workday Student Go Live onboarding tasks! Refer to the [Workday Tools and Navigation](#) job aid for more information about navigating Workday.

The Go Live onboarding is a series of essential tasks you need to complete to prepare for Workday Student. The onboarding process in Workday is sequential and tasks will be delivered to your Workday task inbox and Lynn email. Complete a task to move on to the next item.

- You will receive notifications via email to your Lynn email address to complete the onboarding items
- Complete each task listed. **Tasks may be presented in a different order than listed below.**
- Each completion of an onboarding task will automatically remove the task from the Action column.
- Read all the information/instructions/documents on each task screen.
- **Do not enter comments in the items comment fields as they are not monitored.**
- Contact Workday@lynn.edu for any issues with your onboarding tasks

On this Job aid:

- [Email Notifications](#)
- [Sign-in to Workday](#)
 - [Need help?](#)
- [Onboarding Tasks](#)
 - [Manage my Privacy](#)
 - [Review My Personal Information](#)
 - [Review My Home Contact Information](#)
 - [Address Usage: You must include the appropriate address usage on your home contact information.](#)
 - [Review Preferred Name](#)
 - [Review Legal Name](#)
 - [ACH Refund Setup](#)
 - [Review Friends and Family](#)
 - [Need help?](#)
 - [My Friends and Family Permissions](#)

Email Notifications

Once Admissions process your application and your Lynn account is created, you will receive notifications from lynn@workday.com to complete your onboarding tasks.

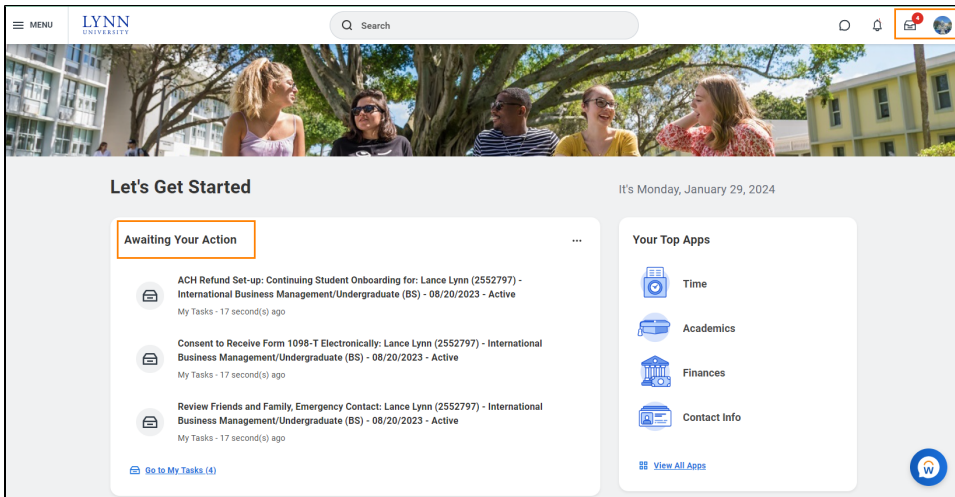
Sign-in to Workday to complete your onboarding.

lynn@myworkday.com Please log into the Workday system to complete this action.	A To-Do Awaits you: Health Insurance To Do International	Fri 2/2/2024 11:55 AM
lynn@myworkday.com Please log into the Workday system to complete this action.	A To-Do Awaits you: To Do - Health Forms	Fri 2/2/2024 11:55 AM
lynn@myworkday.com Please log into the Workday system to complete this action.	A To-Do Awaits you: Create CBORD GET Account	Fri 2/2/2024 11:55 AM
lynn@myworkday.com Please log into the Workday system to complete this action.	A To-Do Awaits you: FNIS Foreign National Information System	Fri 2/2/2024 11:55 AM
lynn@myworkday.com Please log into the Workday system to complete this action.	A To-Do Awaits you: Complete Housing Application	Fri 2/2/2024 11:54 AM

Sign-in to Workday

Log in to [Workday](#). From your home page you can navigate to the following:

- Your inbox tasks
- Awaiting Your Action



To begin your onboarding tasks:

1. Click the box in the center of the screen with the title **Awaiting Your Action**
2. **Or** Click the **Inbox** icon in the top right corner of the screen




Need help?

- [Click here](#) for instructions on how to log into Workday
- [Click here](#) for details on Workday's landing page
- [Click here](#) for details on Workday's tools and navigation
- [Click here](#) for details on Workday's My Tasks and Notifications

Onboarding Tasks

Manage my Privacy



Manage Privacy Settings: Student Lynn (3002160) - International Business Management/Undergraduate (BS) - 08/25/2024 - Active

My Tasks - 22 minute(s) ago

DUE 01/30/2024


Description	To Do
<p>When you consent to share your information outside the institution, Lynn university may release student directory information without written consent or disclosure.</p> <p>Directory information means "information contained in an education record of a student that would not generally be considered harmful or an invasion of privacy if disclosed."</p> <p>The information displayed by default in Workday includes name and photo.</p> <p>In addition you can select to display your Lynn email address and your academic level.</p> <p>For more information please review Lynn university's Academic Catalog, FERPA and Directory information section.</p>	<p>Review your Privacy</p> <p>When select to display your directory information as "public" in Workday, your information is only available to those who have access to the Workday system.</p> <p>The information displayed by default in Workday includes name and photo.</p> <p>In addition you can select to display your Lynn email address and your academic level.</p> <p>For more information please review Lynn university's Academic Catalog, FERPA and Directory information section.</p> <p>Need Help? Contact the Registrar's Office +1 561-237-7303 registrar@lynn.edu</p>

1. Read through the recommendations and select a privacy setting.
2. Scroll down below the privacy setting options for additional information and options. You can check items here to enable additional items to be visible on your profile.
3. The items already checked are visible by default. Click Submit, then Done.

Student	Student Lynn (3002160)
Institution	Lynn University
Description	<p>When you consent to share your information outside the institution, Lynn university may release student directory information without written consent or disclosure.</p> <p>Directory information means "information contained in an education record of a student that would not generally be considered harmful or an invasion of privacy if disclosed."</p> <p>When select to display your directory information as "public" in Workday, your information is only available to those who have access to the Workday system. The information displayed by default in Workday includes name and photo. In addition you can select to display on your Workday profile your Lynn email address and your academic level by selecting the boxes below.</p> <p>For more information please review Lynn university's Academic Catalog, FERPA and Directory information section.</p> <p>Please do not enter comments in the comment fields as they are not monitored.</p> <p>* <input checked="" type="radio"/> I consent to share my information outside of this institution (recommended) <input type="radio"/> I don't consent to share my information outside of this institution</p> <p>* <input checked="" type="radio"/> I want my directory information to be public (recommended) <input type="radio"/> I don't want my directory information to be public</p> <p>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.</p>

Submit
Cancel

Review My Personal Information



Review Personal Information: Student Lynn (3002160) - International Business Management/Undergraduate (BS) - 08/25/2024 - Active

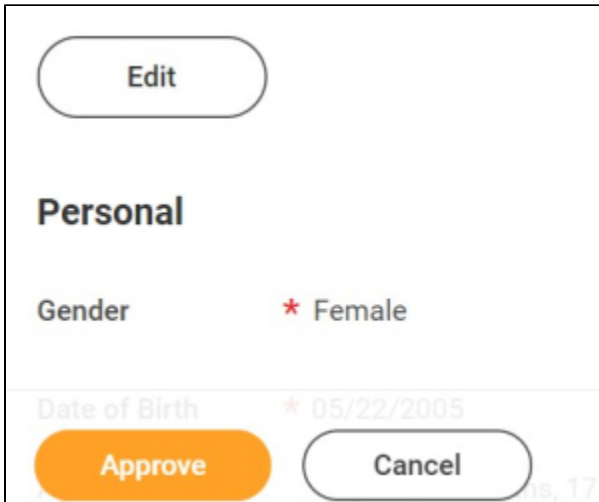
My Tasks - 31 minute(s) ago

DUE 01/30/2024

Description	To Do
<p>All student refunds will be processed through ACH (electronic transfer), to the student's U.S. bank account. The University recommends students set up their Payment Election in Workday to store bank account information and conveniently receive refunds to that account.</p>	<p>The Personal Information you can update in Workday includes:</p> <ul style="list-style-type: none"> • Sex • Date of Birth * • Marital Status * • Race and Ethnicity • Citizenship Status* • Gender Identity • Pronoun • Military Service* <p>Note: Certain changes to your personal information (*) may require you to attach documentation like SSN card, Driver's License, Birth Certificate, Certificate of Naturalization, etc.</p> <p>Under document category select "Personal Information"</p>

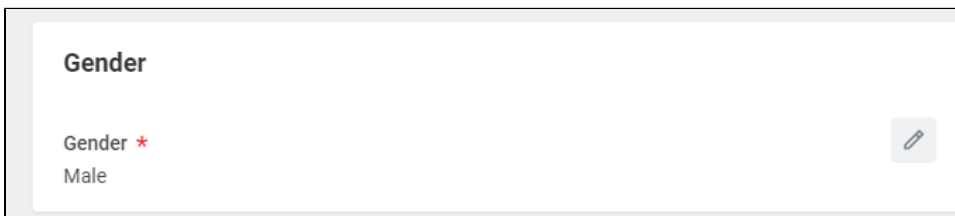
Need Help? Contact the Registrar's
Office +1 561-237-7303 | registrar@lynn.edu

1. Click on the **Review My Personal Information** task.



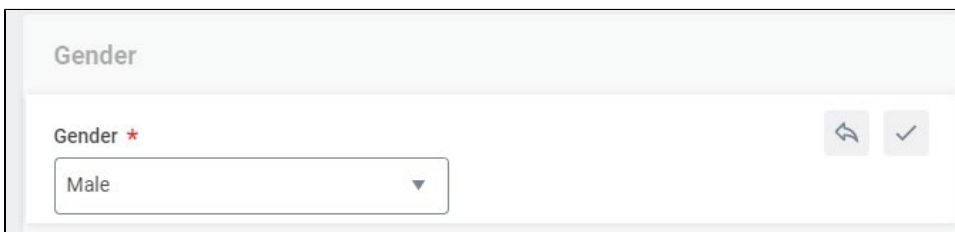
A screenshot of a web form titled 'Personal'. At the top is an 'Edit' button. Below the title, the 'Gender' field is set to 'Female' with a red asterisk. The 'Date of Birth' field is set to '05/22/2005' with a red asterisk. At the bottom are two buttons: 'Approve' (orange) and 'Cancel' (white with a grey border).

2. Review the information available. If you need to make changes, click the **Edit** button.
3. To make edits navigate to the information you want up update click on the pencil icon to unlock the section.



A screenshot of a web form section titled 'Gender'. Below the title, the 'Gender' field is set to 'Male' with a red asterisk. To the right of the field is a pencil icon, indicating that the section can be edited.

4. **Update** the information and then click the check mark icon to save your changes.



A screenshot of a web form section titled 'Gender'. Below the title, the 'Gender' field is set to 'Male' with a red asterisk. To the right of the field is a checkmark icon, indicating that the changes can be saved.

5. Once you have made edits, or if you don't need to make edits, click **Approve**.

Review My Home Contact Information



Review Home Contact Information: Lance Lynn (2552797) - International Business Management/Undergraduate (BS) - 08/20/2023 - Active

My Tasks - 1 hour(s) ago

Description	To Do
It is important that all students keep their contact information up to date. Your home contact information below must reflect your local and permanent domicile, personal email address and home and mobile phone numbers.	<p>Please review your home contact information to reflect your local and permanent domicile and personal email address.</p> <p>Address Usage: You must include the appropriate address usage on your home contact information.</p> <p>Do not override your Legal Home Address with your local address. Add a new contact address with the appropriate usage label instead.</p> <p>Select Mobile Opt-In under Phone Device to receive Lynn alert emergency text messages.</p> <p>Need Help? Contact the Registrar's Office +1 561-237-7303 registrar@lynn.edu</p>

1. Review your contact information.
2. To make changes click the **Edit** button

[Edit](#)

Addresses 2 items

Address	Usage	Visibility	Shared With	Effective Date
3601 N. Military Trail Boca Raton, FL 33431 United States of America	Home (Primary) Person Local Address	Private		01/11/2024
123 Main ave Washington DC, DC 20001 United States of America	Home Legal Home Permanent	Private		01/11/2024

Phones 1 item

Phone Number	Device	Usage	Visibility
+1 561-237-7300	Mobile Opt-In Texting	Home (Primary)	Private

[Approve](#) [Cancel](#)

3. Select pencil icon next to a record to modify or Select X to delete a record
4. Select add button to add a new record

Address

Primary
Yes

Address
3601 N. Military Trail, Boca Raton, FL 33431

Usage
Person Local Address

Visibility
Private

[X](#) [Edit](#)

5. Click **Approve** to complete task or if your contact information is correct



Address Usage: You must include the appropriate address usage on your home contact information.

DO NOT OVERRIDE YOUR LEGAL HOME ADDRESS with your Person Local Address. Instead, click the "Add" button, input your Florida address, add the usage as "Personal Local Address," and ensure that you select the "Primary" checkbox.

- **Legal Home Permanent:** This usage should reflect your home address when you are not attending school. If you reside with your family during non-school periods, kindly input your family's home address in this section.
- **Personal Local Address:** This usage pertains to the address where you currently reside for the ongoing semester. If this address differs from your Legal Home Address, or if you reside on campus, it is necessary to maintain a separate contact entry. Avoid overwriting your legal home address. Instead, click the "Add" button, input your Florida address, add the usage as "Local," and ensure that you select the "Primary" checkbox.
- **Note:** If you are a commuter and reside in Florida and your legal home permanent and local addresses are be the same, please add both usage labels to your primary contact record.

Usage

× Legal Home Permanent

× Person Local Address

Phone Type: Select **Mobile Opt-In Texting** under Phone Device to receive Lynn alert emergency text messages.

Phone Type *

Mobile Opt-In Texting ▼

Country Phone Code *

× United States of America (+1)

Phone Number *

(561) 237-7300

Review Preferred Name

Review Preferred Name: Student Onboarding: Student Lynn (3002160) - International Business Management/Undergraduate (BS) - 08/25/2024 - Active

My Tasks - 31 minute(s) ago

Description	To Do
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In line with university policy, students and employees may enter a preferred first name and/or preferred middle name that affirms their gender, culture or other aspects of their social identity.

Note: Preferred names do not affect the individual's last name, which must remain the person's legal name. Preferred name will display in Workday and other applications (as supported) but will not replace the legal name that is stored in Workday.

Review your preferred name (First Name only). your last name should not be changed.

Need Help? Contact the Registrar's Office +1 561-237-7303 | registrar@lynn.edu

1. Click Change My Preferred Name
2. Uncheck Use Legal Name as Preferred Name
3. Change First Name
4. Click Submit

Use Legal Name As Preferred Name ☐

Country

*
x United States of America
⋮

Prefix
⋮


First Name
*

Middle Name

Last Name
*

Suffix
⋮

Review Legal Name



Review Legal Name: Student Lynn (3002160) - International Business Management/Undergraduate (BS) - 08/25/2024 - Active

My Tasks - 1 hour(s) ago

DUE 01/30/2024

Description	To Do
Lynn University requires your legal name to be correct in our system. Your legal name will be	Review your legal name.

displayed in your official educational documents.

*You must contact the IT Dept. at itsupport.lynn.edu if you wish to have your Lynn email address to reflect your new name.

*You are required to attach one form of documentation to support the name change request, and the documentation needed may vary by situation. Acceptable documents include:

- Birth Certificate
- Social Security Card
- Marriage License
- Divorce Decree
- Court Order
- A statement explaining your request change if it is a result of adding a middle name or correcting the spelling.

Please select document category "**Legal Name Change**"

Need Help? Contact the Registrar's Office +1 561-237-7303 | registrar@lynn.edu

***You must contact the IT Dept. at itsupport.lynn.edu if you wish to have your Lynn email address to reflect your new name.**

1. If the legal name displayed is correct click "Approve" otherwise use the "Edit" box below and make the appropriate changes.
2. Drag and drop your documentation or select a file from your computer
3. Select document category "Legal Name Change"
4. Click Submit

Edit Legal Name
Student Lynn

Effective Date *

01/29/2024

Country *

United States of America

Prefix

First Name *

Student

Middle Name

Last Name *

Lynn

Suffix

enter your comment

Attachments

Drop files here

or

Select files

ACH Refund Setup



ACH Refund Set-up: Continuing Student Onboarding for: Lance Lynn (2552797) - International Business Management/Undergraduate (BS) - 0...

My Tasks - 37 minute(s) ago

Description	To Do
All student refunds will be processed through ACH (electronic transfer), to the student's U.S. bank account . The University recommends students set up their Payment Election in Workday to store bank account information and conveniently receive refunds to that account.	To enter payment election information you will need your U.S. Bank Name, Account type (checking or Savings), Routing Transit Number and Account Number. This will allow you to receive funds when applicable. Need Help? Contact Student Financials +1 561-237-7504 studentaccounts@lynn.edu

1. Select **Payment Elections**

If you are a student worker, you may already have Payment Elections in Workday. Review your Accounts and make any necessary changes.

2. Click **submit**

Accounts 2 Items					
Account Nickname	Country	Bank Name	Account Type	Account Number	
BOA2 *****4896	United States of America	BOA2	Checking	*****4896	<div>Edit</div> <div>Remove</div> <div>View</div>
BOA *****4897	United States of America	BOA	Checking	*****4897	<div>Edit</div> <div>Remove</div> <div>View</div>

If you do not have a payment election, a payment election option screen will appear.

1. Select **"Direct Deposit"** for Expense Payments and Student Refunds

Payment Election Option

Person

Default Country United States of America

Default Currency USD

Preferred Payment Method

Expense Payments ✕ Direct Deposit ⋮

Student Refund ✕ Direct Deposit ⋮

2. Enter Bank account information and select OK

- **Routing Numbers** is a required field and should be 9 digits in length
- **Bank name** is required field
- **Account Type** is a required field
- **Account Number** is a required field.

Account Setup

Sample Check

Jonathan Doe
4321 Main St.
Anywhere, CA 94000

DATE

\$ Dollars

YOUR BANK NAME
2678 1st St.
Anywhere, CA 94000

DO NOT INCLUDE Check #

⑆ 23456789 ⑆ 000 1234567890 ⑆ -99-123

9 Digit Routing #
Between the 12 symbols

Account #
Include all zeros

Account Information

Account Type * ☒ Checking
☐ Savings

Routing Transit Number *

Account Number *

Bank Name *

Bank Identification Code

Account Nickname (optional)

OK
Cancel



Review Friends and Family, Emergency Information: Student Lynn (3002160) - International Business Management/Undergraduate (BS) - 08/25/2024 - Active

My Tasks - 20 hour(s) ago

DUE 01/30/2024

Need help?

- [Click here](#) for information on third party proxy (log in and navigation)
- [Click here](#) for detailed instructions on Friends and Family and Third-Party permissions

Description	To Do
<p>Friends and family include individuals you would like listed as emergency contacts as well as any individuals you would like to view your selected academic and/or financial records and/or make payments on your behalf.</p> <p>Please use the Add button to add an individual. You will be required to add at least one method of communication for each person listed.</p>	<p>Please review the friends and family information</p> <p>Students are required to have at least one emergency communication contact.</p> <p>For Emergency Contacts, you must enter an address and a phone number.</p> <p>For Third Party Users you must enter an email address.</p> <p>Please keep this</p> <p>Need Help? Contact the Registrar's Office +1 561-237-7303 registrar@lynn.edu</p>

1. Click the Add button to add an individual. You will be required to add at least one method of communication for each person listed.
2. Click on the **Review My Friends and Family** task. Read through the instructions.
3. Click the **Add** button.
4. Select **Relationship Type** (you must select an **Emergency Contact** relationship type before any other types can be selected and before you can complete this task.)
5. Click the box next to **Is Third-Party User** if you want this contact to be a third-party user and have their own Workday access to make payments or view **account/academic** information.

Add My Friends and Family

For Lance Lynn (2552797)

Relationship Types * ☐ Emergency Contact ☐ Parent

Relationship

Is Third Party User ☐

Preferred Languages

Comments

6. In the Name section, add the contact's first name, last name.

Name Contact Information

Country * United States of America

Prefix

First Name *

Middle Name

Last Name *

Suffix

7. In the Contact Information tab, click **Add** to submit at least one method of contact.
 For **Emergency Contacts**, you must enter an address and a phone number. Under phone, select device type **mobile opt-in** or mobile opt-out to include or exclude them of Lynn's emergency notifications
 For **Third Party Users** you must enter an email address.

Name

Contact Information

Phone

Add

Address

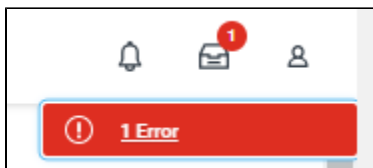
Add

Email


Add

8. Click **OK**, and then click **Done**.
9. Return to the **Review my Friends and Family** task.
10. Click **Submit**. Click **Done**.

You must add at least one emergency contact to your records otherwise you will get an error when you click Submit



My Friends and Family Permissions



Review Friends and Family, Emergency Information: Lancelot Lynn (3002161) - Fashion and Retail/Undergraduate (BS) - 08/25/2024 - Active

My Tasks - 10 minute(s) ago

DUE 01/31/2024

Description	To Do
To let a third-party view information in Workday and /or receive information from Academic Advising, Student Records, and Financial Aid about your grades, registration, and/or financial aid package, Set Permissions for a Third Party to Access Your Student Information.	To let a third-party view information in Workday and /or receive information from Academic Advising, Student Records, and Financial Aid about your grades, registration, and/or financial aid package, Set Permissions for a third-party to Access Your Student Information.

When a student grants access to a third party for the first time, the third party will be invited to create a Lynn Workday account. The third-party will then use that account to log in to Workday.

The third-party will only be able to view information for which the student has granted them access.

Third-party access can be changed or removed at any time by the student.

To update third-party permissions:

- If not enabled, select "Enable Third Party" button next to the third party name
- Select "Is Third Party User" checkmark. Select "OK"
- If enabled, select "Add Permissions"
- Verify third-party name. Select "OK"
- Scroll down and select the "Allowed" checkmarks under the tasks you would like to grant access.
- Select "OK"
- Complete Purpose of Waiver
- Click Confirm
- Click Submit

Please do not enter comments in the comment fields as they are not monitored.

When a student grants access to a third party for the first time, the third party will be invited to create a Lynn Workday account. The third-party will then use that account to log in to Workday.

The third-party will only be able to view information for which the student has granted them access.

Third-party access can be changed or removed at any time by the student.

Need Help? Contact the Registrar's Office +1 561-237-7303 | registrar@lynn.edu

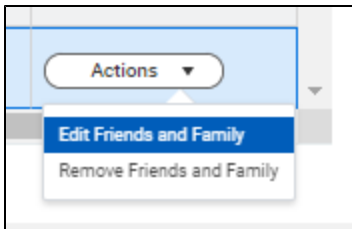
To provide third-party access to your records you must first select contact as third party user, then manage permissions for user.

1. On the third-party record, scroll to the right and select Actions button.

The screenshot shows a table with the following columns: Relationship Types, Relationship, Phone Number, Email Address, Address, Third Party, and Actions. The first row contains the following data: elot, Emergency Contact, +1 561-237-7355, momillynn@lynn.edu, and an unchecked checkbox in the Third Party column. The 'Actions' button is highlighted with an orange box. A red arrow points to the 'Actions' button. Above the table, there is a list of instructions for adding a third party, including selecting relationship type, name, and permissions. Below the table, there is a red arrow pointing to the 'Add' button.

Relationship Types	Relationship	Phone Number	Email Address	Address	Third Party	Actions
elot	Emergency Contact	+1 561-237-7355	momillynn@lynn.edu		<input type="checkbox"/>	Actions

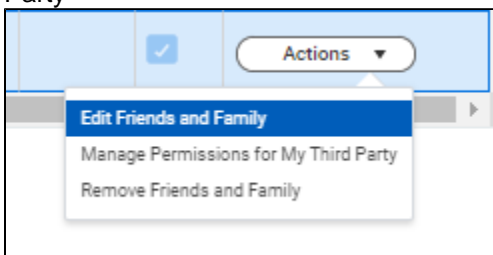
2. Select Edit Friends and Family



3. Select Is Third Party User (specific permissions will be granted in the next steps). Click OK.

 A screenshot of a form with three fields: 'Relationship' (empty), 'Is Third Party User' (checkbox checked), and 'Preferred Languages' (empty). Below the 'Is Third Party User' checkbox, there is an alert message: 'Alert: You must still grant permissions to this third-party user.'

4. On the contact record, scroll to the right. Select Action button. Select Manage Permissions for My Third Party



5. Verify third-party name, click OK

 A screenshot of the 'Manage Permissions for My Third Party' form. It contains instructions about granting access to student information. Below the instructions, there are two input fields: 'Third Party' (containing 'mom1 lancelot') and 'Institution' (containing 'Lynn University'). At the bottom, there are 'OK' and 'Cancel' buttons.

6. Select the permissions for the third-party user by clicking the checkbox next to the permission. You may grant the following permissions:
- Make a Payment
 - View Financial Aid Package
 - View Account Activity
 - View Student Statement
 - View Current Classes
 - View Student Grades

- Generate Unofficial Transcript

Institution	Lynn University
Third Party	mom1 lancetot
Student	Lancelot Lynn (3002161)
Relationship	(empty)

Tasks Available for Third Party User

Task Name	Make a Payment
Description	This task gives access to make a payment on the student's behalf.
Allowed	<input checked="" type="checkbox"/>

Task Name	View Financial Aid Package
Description	This task gives access to view the financial aid details on the student's behalf, including details around what financial aid is offered and what the estimated costs are for the year.
Allowed	<input type="checkbox"/>

Task Name	View Account Activity
Description	This task gives access to view student account transactions, including charges, payments, financial aid, and refunds, that have been posted to the student account. Details around the Due Now amount and any available payment plans can also be seen.
Allowed	<input checked="" type="checkbox"/>

Task Name	View Student Statement
Description	This task gives access to view a student's statement without courses on the student's behalf.
Allowed	<input checked="" type="checkbox"/>
Description	This option displays courses that the student is charged for on the student statement.
Allowed	<input checked="" type="checkbox"/>

OK Cancel

7. In the **FERPA Waiver** pop-up, write in the purpose of the waiver, and click Confirm.

Manage Permissions for My Third Party

To let a third party **view information in Workday and/or receive information** from Academic Advising, Student Records, and Financial Aid about your grades, registration, and/or financial aid package, Set Permissions for a Third Party to Access Your Student Information.

When a student grants access to a third party for the first time, the third party will be invited to create a Lynn Workday account. The third party will then use that account to log in to Workday.

The third party will only be able to view information for which the student has granted them access.

Third-party access can be changed or removed at any time by the student.

Privacy Release Authorization Waiver

The following is a summary of the access to your student account that you have authorized to a third party. This access overrides all FERPA restrictions that you have previously set up on your student account for the individual indicated below.

Lancelot Lynn (3002161) is allowing mom1 lancetot to have access to the following tasks:

Make a Payment
View Account Activity
View Student Statement (With Courses)

Purpose of Waiver *

Permission to view my info

By clicking "Confirm" you authorize the individual named above to have access to your student account.

Confirm *

