

# Returning Student Onboarding Guide

## Onboarding with Workday Student

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

Student Onboarding is a series of essential tasks you will complete to prepare for starting the academic period (term) at Lynn. The onboarding process in Workday is sequential and tasks will be delivered to your Workday task inbox and Lynn email. Complete a task or arrange completion before you click the submit button 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. **Each task is personalized and 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.
- Tasks requiring you to “review documents” will open in a new browser window.
- “To do” tasks will re-direct you to other websites. These are reminders to complete the task outside of Workday.
- Read all the information/instructions/documents on each task screen.
- **Do not enter comments in the items comment fields as they are not monitored.**

On this Job aid:

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## Email Notifications

Once Admission process your application and your Lynn account is created, you will receive notifications from [lynn@workday.com](#) to complete your onboarding tasks.

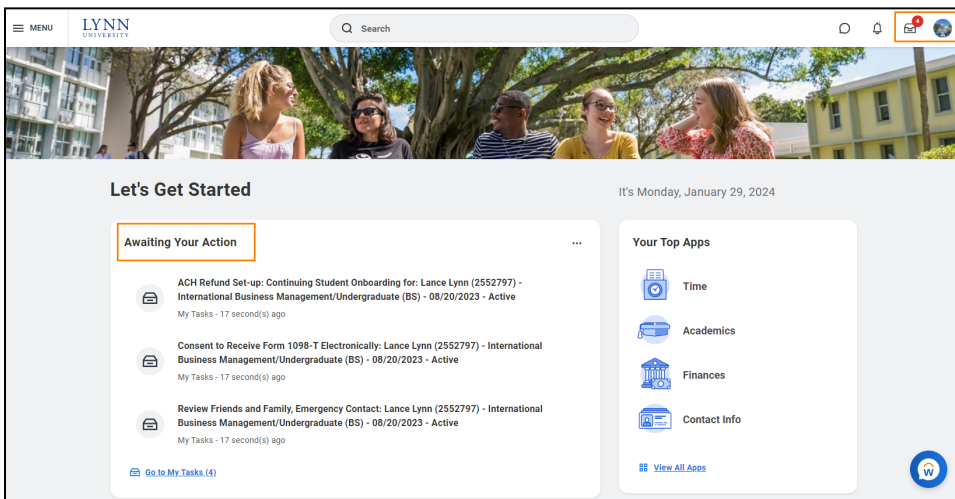
Sign-in to Workday to complete your onboarding.

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

## 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

### Request Consent for Electronic 1098-T



**Consent to Receive Form 1098-T Electronically: Lance Lynn (2552797) - International Business Management/Undergraduate (BS) - 08/20/2023 - Active**

My Tasks - 1 hour(s) ago

The 1098T form is prepared every January to report to the IRS how much tuition you paid for the previous tax year, and how much you received in scholarships, if applicable. This is a consent to receive your 1098T form electronically.

Description	To Do
<p>Federal regulation allows those eligible to receive IRS form 1098-T the option to receive the form in an electronic format instead of through the mail. As a result, Lynn University students may elect to view and print their IRS form 1098-T through Workday self-services rather than wait for it to come by mail. When you give consent, you may view the form as soon as it is available each January. The information on the 1098T is only informational. You must rely on your receipts to determine the amount paid out-of-pocket for the tax credit.</p> <p>Students that do not give consent will have IRS form 1098-T mailed to the permanent address in the system.</p>	<p>By signing your consent to receive your 1098T form electronically, you are electing not to receive a paper form in the mail. When your 1098T form is ready, you will receive a notification with instructions how to access the form in Workday.</p> <p>Need Help? Contact Student Financials +1 561-237-7504   <a href="mailto:studentaccounts@lynn.edu">studentaccounts@lynn.edu</a></p>

1. Click on the **Consent to Receive Form 1098-T Electronically** task.
2. Click the checkbox to the right of **Yes, I have read and consent to the terms and conditions**.

The 1098T form is prepared every January to report to the IRS how much tuition you paid for the previous tax year, and how much you received in scholarships, if applicable.

By signing your consent to receive your 1098T form electronically, you are electing not to receive a paper form in the mail. When your 1098T form is ready, you will receive a notification with instructions how to access the form online.

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

Yes, I have read and consent to the terms and conditions ☒

3. Click **Submit**. Click **Done**.

## 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><b>Directory information</b> 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 <a href="#">Academic Catalog</a>, <a href="#">FERPA</a> and <a href="#">Directory information</a> section.</p>	<p>Review your Privacy</p> <p><b>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.</b></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 <a href="#">Academic Catalog</a>, <a href="#">FERPA</a> and <a href="#">Directory information</a> section.</p> <p>Need Help? Contact the Registrar's Office +1 561-237-7303   <a href="mailto:registrar@lynn.edu">registrar@lynn.edu</a></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 <b>outside the institution</b>, Lynn university may release student directory information without written consent or disclosure.</p> <p><b>Directory information means</b> "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><b>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.</b> The information displayed by default in Workday includes name and photo. In addition you can <b>select to display on your Workday profile</b> your Lynn email address and your academic level by selecting the boxes below.</p> <p>For more information please review Lynn university's <a href="#">Academic Catalog</a>, <a href="#">FERPA</a> and <a href="#">Directory information</a> section.</p> <p><b>Please do not enter comments in the comment fields as they are not monitored.</b></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 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><b>Address Usage:</b> 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 <b>Mobile Opt-In</b> under Phone Device to receive Lynn alert emergency text messages.</p> <p>Need Help? Contact the Registrar's Office +1 561-237-7303   <a href="mailto:registrar@lynn.edu">registrar@lynn.edu</a></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

✕
✎

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.

- **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](mailto: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 \*

× United States of America

Prefix

First Name \*

Student


Middle Name

Last Name \*

Lynn

Suffix

## Federal Student Aid Authorization



**Federal Student Aid Authorization:**  
My Tasks - 2 minute(s) ago

Your authorization is required for federal student aid funds to apply to non-institutional charges.

Description	To Do
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Your authorization is required for federal student aid funds to apply to non-institutional charges.

**Definition of non-institution charges:** all other charges other than tuition, fees, housing, and food.

You can rescind this authorization at any time in writing to the Student Accounts Office at [studentaccounts@lynn.edu](mailto:studentaccounts@lynn.edu).

By checking the "I authorize" box and pressing Submit button, you authorize Lynn University to apply federal financial aid to non-institutional charges.

Need Help? Contact Student Financials +1 561-237-7504| [studentaccounts@lynn.edu](mailto:studentaccounts@lynn.edu)

1. Select **I authorize**
2. Click **Submit**

### Make My Federal Student Aid Authorizations

Created: 01/29/2024

Your authorization is required for federal student aid funds to apply to non-institutional charges. By checking the "I authorize" box and pressing Submit below, charges.

I understand that I can rescind this authorization at any time in writing to the Student Accounts Office at [studentaccounts@lynn.edu](mailto:studentaccounts@lynn.edu).


Definition of non-institution charges: all other charges other than tuition, fees, housing, and food.

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Federal Student Aid Authorizations

Student	Student Lynn (3002160)
Institution	Lynn University
Expires After	2024 - 2025 Academic Year
Signature Statement	I authorize this institution to use my Federal Student Aid to pay for non-institutional charges.
I Authorize	<input checked="" type="checkbox"/>

## Credit on Account Retention Authorization



**Credit on Account Retention Authorization: Student Lynn (3002160) - International Business Management/Undergraduate (BS) - 08/25/2024 - Active**

My Tasks - 12 minute(s) ago

Description	To Do
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This authorization states that if any credit is created due to the receipt of financial aid funds, the student and parent authorize the university to hold it on the student account. If at any time a student would like a refund of the excess funds, a Request for Refund Form must be completed in Workday so a refund can be processed.

**Please read the attached document carefully.**

You can access onboarding acknowledged documents under your Profile > Personal > Documents > Reviewed: Standard

Need Help? Contact  
Student Financials +1 561-237-7504|  
[studentaccounts@lynn.edu](mailto:studentaccounts@lynn.edu)

1. Select **I authorize**
2. Click **Submit**

**Credit on Account Retention Authorization**
☆

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


Created: 01/29/2024

**Please read the attached document carefully.** This authorization states that if any credit is created due to the receipt of financial aid funds, the student and parent authorize the university to hold it on the student account. If at any time a student would like a refund of the excess funds, a Request for Refund Form must be completed in Workday so a refund can be processed.

You can access onboarding acknowledged documents under your Profile > Personal > Documents > Reviewed: Standard

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


**Documents**

Document

Credit on Account Retention Authorization

Signature Statement
I acknowledge I have read the attached document.

I Agree
☒

## Notification of Rights under FERPA



**Notification of Rights under FERPA: Student Lynn (3002160) - International Business Management/Undergraduate (BS) - 08/25/2024 - Active**

My Tasks - 23 minute(s) ago

Description	To Do
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As a college student, you are the only person who has access to your academic information. That means if someone wants to know or verify information regarding your grades or progress towards graduation we cannot release your information without your consent.

To add authorized users to access your information, review the job aid [How to Add Emergency Contacts and Third Party Proxy](#)

**Please read the attached document carefully.**

You can access onboarding acknowledged documents under your Profile > Personal > Documents > Reviewed: Standard

Need Help? Contact the Registrar's Office +1 561-237-7303 | [registrar@lynn.edu](mailto:registrar@lynn.edu)

- 1. Select **I authorize**
- 2. Click **Submit**

Notification of Rights under FERPA

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


Created: 01/29/2024

**Please read the attached document carefully.** As a college student, you are the only person who has access to your academic information. That means if someone wants to know or verify information regarding your grades or progress towards graduation we cannot release your information without your consent. You can access onboarding acknowledged documents under your Profile > Personal > Documents > Reviewed: Standard

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

Documents

Document

 Notification of Rights under FERPA


Signature Statement

I acknowledge I have read the attached document

I Agree

☒

Health Insurance Enrollment



Health Insurance To Do

Student Onboarding: Lancelot Lynn (3002161) - Fashion and Retail/Undergraduate (BS) - 08/25/2024 - Active

My Tasks - 2 minute(s) ago

Description	To Do
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Full-Time Day students and all Graduate Students living in the US, are required to purchase this insurance plan.

**US Citizens:** The premium is added to the student's tuition fees unless proof of comparable coverage is furnished. Your account will be charged for the student insurance unless your waiver request has been approved by the published deadline.

**International students:** The premium is added to the student's tuition fees and they will be automatically enrolled in the Insurance plan. Students will receive more information as they get close to the start of the term.

Visit UnitedHealthcare page at [studentcenter.uhcsr.com](https://studentcenter.uhcsr.com) and search Lynn University.

If you are interested in learning more about enrolling in the school sponsored voluntary dental and/or vision plan, please visit [uhcsr.com](https://uhcsr.com).

Need Help? Contact Financial Aid +1 561-237-7185| [financialaid@lynn.edu](mailto:financialaid@lynn.edu)

1. When you complete this item, click "**Submit**" to acknowledge this task is completed outside Workday.

Complete To Do

Health Insurance To Do International

...

☆

📅

PDF

⚙️

🔗

Created: 01/30/2024

Full-Time Day students and all Graduate Students living in the US, are required to purchase this insurance plan. The premium is added to the student's tuition fees.

**You will be automatically enrolled in the Insurance plan and sent more information as you get close to the start of the term.**

You will need your Lynn University student ID number, Date of Birth and your Lynn University email address to verify your entry to the enrollment site. Click "**Submit**" to acknowledge this task is completed outside of Workday.

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

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For Lancelot Lynn (3002161) - Fashion and Retail/Undergraduate (BS) - 08/25/2024 - Active

Overall Process Student Onboarding: Lancelot Lynn (3002161) - Fashion and Retail/Undergraduate (BS) - 08/25/2024 - Active

Overall Status In Progress

Due Date 01/31/2024


Instructions Visit UnitedHealthcare page at [studentcenter.uhcsr.com](https://studentcenter.uhcsr.com) and search Lynn University. Please click **Opt-In to ENROLL** in the Lynn University mandatory plan. You will be able to print your Student Health Insurance Card. If you are interested in learning more about enrolling in the school sponsored voluntary dental and/or vision plan, please visit [uhcsr.com](https://uhcsr.com).

Submit

Save for Later

Close

## Complete Health Forms



**To Do - Health Forms: Student Onboarding: Student Lynn (3002160) - International Business Management/Undergraduate (BS) - 08/25/2024 - Active**

My Tasks - 24 minute(s) ago

Description	To Do
All new, incoming students who will be residing on campus are required to log into the <a href="#">Lynn Student Health Portal</a> with their Lynn account and complete submit the following health documents prior to arriving on campus.	<p>Log into the <a href="#">Lynn Student Health Portal</a> with your Lynn account and complete:</p> <ol style="list-style-type: none"> <li>1. Health History and Authorization Form: To be completed and signed by the student and/or parent if the student is under 18 (Does <u>NOT</u> require a physician's signature.)</li> <li>2. Proof of a Physical Examination: Proof of a general physical exam is required for all students living on campus, and must be dated within 12 months of your first semester living on campus at Lynn University.</li> <li>3. Immunization Records <ul style="list-style-type: none"> <li>- Proof of TWO MMR (Mumps, Measles, Rubella) vaccines - OR- proof of immunity via a blood test ("titers")</li> <li>- Proof of a Meningococcal ACWY Vaccines dated within FIVE years of your first semester living on campus</li> </ul> </li> </ol> <p>Proof of vaccines or a signed waiver in the case of Hepatitis B are required.</p> <p>Need help? Contact the Student Health office at <a href="mailto:StudentHealth@lynn.edu">StudentHealth@lynn.edu</a> 561-237-7231</p>

1. When you complete this item, click "**Submit**" to acknowledge this task is completed outside Workday.

**Complete To Do**
[To Do - Health Forms](#)

Created: 01/29/2024

All new, incoming students who will be residing on campus are required to log into the [Lynn Student Health Portal](#) with their Lynn account and complete submit the following

1. Health History and Authorization Form: To be completed and signed by the student and/or parent if the student is under 18 (Does NOT require a physician's signature.)
2. Proof of a Physical Examination: Proof of a general physical exam is required for all students living on campus, and must be dated within 12 months of your first semester
3. Immunization Records
  - Proof of TWO MMR (Mumps, Measles, Rubella) vaccines - OR- proof of immunity via a blood test ("titers")
  - Proof of a Meningococcal ACWY Vaccines dated within FIVE years of your first semester living on campus

Proof of vaccines or a signed waiver in the case of Hepatitis B are required.

**Questions?** email [StudentHealth@lynn.edu](mailto:StudentHealth@lynn.edu) or call + 1 (561) 237-7705  
Click "Submit" to acknowledge this task is completed outside of Workday.

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

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For Student Lynn (3002160) - International Business Management/Undergraduate (BS) - 08/25/2024 - Active

Overall Process [Student Onboarding: Student Lynn \(3002160\) - International Business Management/Undergraduate \(BS\) - 08/25/2024 - Active](#)

Overall Status In Progress

Due Date 01/30/2024

Instructions Log into the [Lynn Student Health Portal](#) with your Lynn account to complete all your health documents.  
For questions contact Student Health office at [StudentHealth@lynn.edu](mailto:StudentHealth@lynn.edu) 561-237-7231

## 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 <b>U.S. bank account</b> . The University recommends students set up their Payment Election in Workday to store bank account information and conveniently receive refunds to that account.	<p>To enter payment election information you will need your <b>U.S. Bank</b> Name, Account type (checking or Savings), Routing Transit Number and Account Number. This will allow you to receive funds when applicable.</p> <p>Need Help? Contact Student Financials +1 561-237-7504   <a href="mailto:studentaccounts@lynn.edu">studentaccounts@lynn.edu</a></p>

#### 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><b>Students are required to have at least one emergency communication contact.</b></p> <p>For <b>Emergency Contacts</b>, you must enter an address and a phone number.</p> <p>For <b>Third Party Users</b> you must enter an email address.</p> <p>Please keep this</p> <p>Need Help? Contact the Registrar's Office +1 561-237-7303   <a href="mailto:registrar@lynn.edu">registrar@lynn.edu</a></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 \*

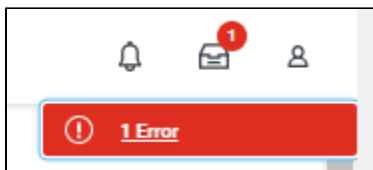
Suffix

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
<b>Phone</b> <input type="button" value="Add"/>	
<b>Address</b> <input type="button" value="Add"/>	
<b>Email</b> <input type="button" value="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**



## Review My Friends and Family



**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
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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.**

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.

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Need Help? Contact the Registrar's Office +1 561-237-7303 | [registrar@lynn.edu](mailto:registrar@lynn.edu)

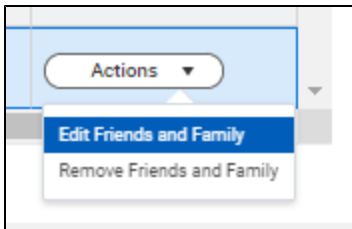
To provide third party access to your records you must first select contact as third party user, then manage permissions for user.

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

The screenshot shows a web interface for managing third party records. At the top, there are instructions: "Enter Relationship type: You can select multiple types.", "Select 'Emergency Contact'", "Enter First and Last Name", "Select checkmark 'Is Third Party User' if you would like to grant them access to view selected financial and/or academic information in Workday.", "Select Contact Information tab", "You must add a phone number and email address.", "Under phone, select device type mobile opt-in or mobile opt-out to include them or exclude them of Lynn's emergency notifications.", and "Select OK". Below these instructions is a warning: "Please do not enter comments in the comment fields as they are not monitored." Below the warning is a table with one item. The table has columns: Relationship Types, Relationship, Phone Number, Email Address, Address, Third Party, and Actions. The first row has the following data: "Emergency Contact", "Emergency Contact", "+1 561-237-7355", "momillynn@lynn.edu", and a checkbox. The "Actions" button is highlighted with an orange box. A red arrow points to the "Actions" button.

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

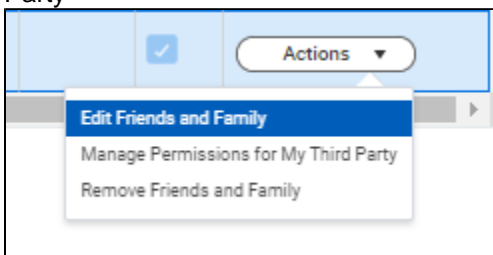
2. Select Edit Friends and Family



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 a dialog box titled 'Manage Permissions for My Third Party'. The dialog contains a paragraph of text explaining the purpose of the permissions. Below the text, there are two input fields: 'Third Party \*' with the value 'mom1 lancelot' and 'Institution \*' with the value 'Lynn University'. At the bottom, there are two buttons: 'OK' (orange) and 'Cancel' (white).

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** ☒

**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** ☐

**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** ☒

**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** ☒

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** 9/10

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.

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**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 \*** Normal **B I U A** **☰** **🔗**

Permission to view my info

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

**Confirm \*** ☒

## Review Lynn Code of Conduct



**Review Lynn Code of Conduct:** [REDACTED] - Marketing/Undergraduate (BS) -

**08/21/2022 - Active**

My Tasks - 1 month(s) ago

Description	To Do
<p>The purpose of the student code of conduct is to outline behavioral expectations for Lynn University students. The student code of conduct sets specific expectations for student behavior, identifies behaviors prohibited at the university, and describes the overall process and stated procedures for addressing allegations of student code of conduct violations, as well as the possible consequences for students who violate these standards.</p>	<p><b>This is the last onboarding item to complete. It will be available to you 45 days before the start of the term.</b></p> <p><b>Please read the attached document carefully.</b></p> <p>You can access onboarding acknowledged documents under your Profile &gt; Personal &gt; Documents &gt; Reviewed: Standard</p> <p>Need Help? Contact the Registrar's Office +1 561-237-7303   <a href="mailto:registrar@lynn.edu">registrar@lynn.edu</a></p>

1. Select **I authorize**
2. Click **Submit**

### Review Lynn Code of Conduct

Review Documents for 

Marketing/Undergraduate (BS) - 08/21/2022 - Active


Created: 12/14/2023

The purpose of the student code of conduct is to outline behavioral expectations for Lynn University students. The student code of conduct sets specific expectations for student behavior, identifies behaviors prohibited at the university, and describes the overall process and stated procedures for addressing allegations of student code of conduct violations, as well as the possible consequences for students who violate these standards. Please read the attached document carefully. You can access onboarding acknowledged documents under your Profile > Personal > Documents > Reviewed: Standard

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

#### Documents

Document

 Lynn Code of Conduct

Signature Statement

I acknowledge I have read the attached document.

I Agree

☒

Comment

Submit

Save for Later

Cancel

## Educational Partner Discounts - Supporting Documentation