



New Student Onboarding

Overview

This quick reference guide will cover how to complete your student onboarding tasks in Workday. The steps you are required to complete include:

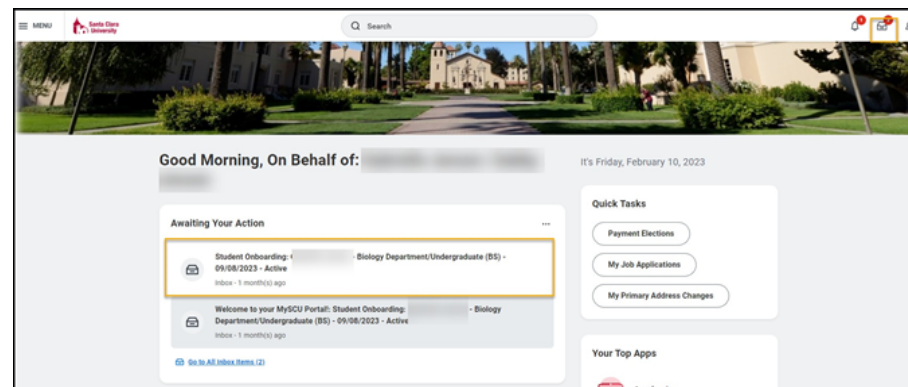
- Annual Online Agreement
- Manage My Privacy Settings
- Review My Personal Information
- My Home Contact Information
- Review My Friends and Family
- FERPA Release
- Review/Acknowledge Bulletin
- Make My Federal Student Aid Authorizations
- Consent to Receive Form 1098 – Electronically

Note: This is only a guide and should not be considered your only resource when completing onboarding. Please read through each step carefully and completely. If you have any questions, please contact onestop@scu.edu

Process

1. To access Workday, first login into the **MySCU Portal** with your SCU credentials (scu.edu/login).
2. From the portal, click on the **Workday** tile.

3. There are two ways to access your Workday inbox from your home screen. You can access the inbox from the preview box on your home screen or click the **Inbox** icon at the top right corner.



You can always return to the inbox to complete these steps at a later time.

5. The next step is to complete the **Annual Online Agreement**.
 - a. **If you are under 18 years old**, click and open the Annual Online Agreement PDF, print the document, have a parent/guardian review and agree to terms by signing the document, then upload the signed document.
 - b. **If you are 18 years of age or older**, Open the **Annual Online Agreement** PDF. After you have reviewed the PDF click on the blue button labeled **E-sign by Adobe Sign**.



New Student Onboarding

Documents

On this page, you can only download the original, unsigned version of the document.

Document Annual Online Agreement 24-25 Terms & Conditions **Step 1**

Instructions Please click on the above Annual Online Agreement to review each of the 13 pages of the document, which includes four separate agreements. Class registration will be RESTRICTED until this agreement is reviewed and acknowledged each academic year.

Click on the e-Sign link below to initial and sign the document and then submit to complete this task.

Click the below button to e-sign. Please note that when signing documents you will be leaving Workday Service. You may need to wait a few seconds for the signature status of the documents to be updated in Workday before you can submit the Inbox task. Please wait until you are redirected to Workday before you close your browser.

E-sign by Adobe Sign

E-sign by Adobe Sign **Step 2**

- c. Click the blue **Start** button to locate the areas of the document that need to be signed and then click the blue **Next** button. Then click the blue **Click to Sign** button.
- d. Click **Submit**.

You will now receive several items in your inbox. You need to click on each item and complete and submit them separately.

- 6. **Manage My Privacy Settings** – Join the Bronco community with your directory information.
 - a. If you elect to be included in the Public Student Directory, your **Name, Photo, Institution** and **Social Media** links are always public by default.
 - b. If you wish to add other links (Primary Institutional Email Address, Academic Level, etc) – click on the box to the right of each value.

YOUR NAME	<input type="checkbox"/>
YOUR INSTITUTION	<input type="checkbox"/>
YOUR EMAIL	<input type="checkbox"/>
YOUR PHONE	<input type="checkbox"/>
YOUR ADDRESS	<input type="checkbox"/>
YOUR SOCIAL MEDIA	<input type="checkbox"/>

- Click **Submit** and **Done**.

- 7. **Review My Personal Information** – If any changes/edits are needed click the **EDIT** button to update and approve your changes.

- a. To make changes click on the pencil icon
- b. The following information is required:
 - Gender
 - Date of Birth
 - Marital Status

- c. Use the check icon to save any changes you made.
- d. Click **Submit**

- 8. Review **My Home Contact Information** - If any changes/edits are needed click the **EDIT** button to update and approve your changes.

- a. To make changes click on the pencil icon
- b. **My Home Contact Information** – Country is a required field; once selected the system will ask you for more detailed information. Complete all the required fields marked with red asterisk.



New Student Onboarding

Country *
x Canada

Address Line 1 *


Address Line 2

City

Province or Territory *

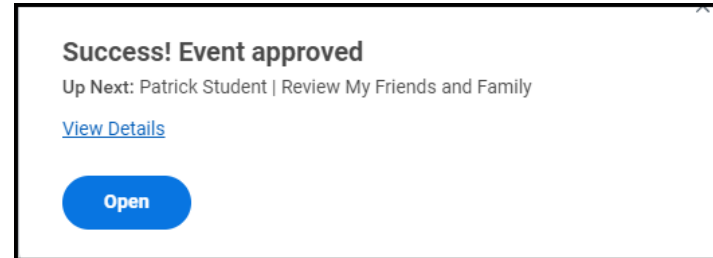
Postal Code *

Usage

9. Click the check icon  to save any changes you made.


10. Review your **Mobile Phone Number** and **Personal Email Address** (non-SCU email address).

11. Once you have reviewed all items click the **Submit** button.
a. You should see a new window open with the following message:



12. Click on the **Open** button to start the next onboarding task.

13. Review My Friends and Family

- Click the  button to add any Friends and Family that you would like to include in your University records.
- As a student you are required to identify at least one Emergency Contact
- Include at least **one phone number, address or email address**.
- Click **OK** and **Done**.

14. FERPA Release

a. In order to designate one or more persons on your FERPA Release, navigate to your Student Profile:

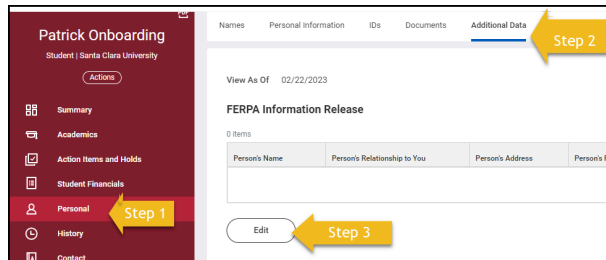


- Choose Personal
- Click Additional Data



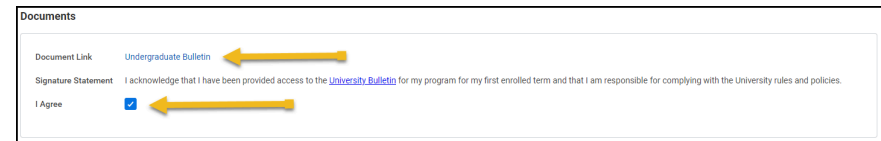
New Student Onboarding

d. Edit



15. **Review/Acknowledge Bulletin** – It is the student’s responsibility to understand and abide by all University policies in the University Bulletin.

- Click on Document Link to the bulletin.
- Check the I Agree button.



e. Click the plus icon and enter in all required fields marked with

c. Click **Submit**.

(*).

f. Under **FERPA Release – Academic Records**, choose which of the

following records to be released:

- Enrollment Verification
- Class Scheduled
- Cumulative GPA
- Graduation Status
- Academic Holds

g. Under **FERPA Release – Financials** – choose which of the following records to be released:

- Student Accounting/Billing Information
- Awarded Financial Aid
- Delinquent/Internal Collection Activity
- Financial Holds

h. Click **OK** and **Done**.

16. **Make My Federal Student Aid Authorization**

a. Click the box if you authorize SCU to use Federal Aid for non-institutional charges.

b. If you do not want to authorize SCU to use Federal Aid for non-institutional charges leave it blank.

c. Click **Submit**.



New Student Onboarding

17. Consent to Receive Form 1098 – Electronically

a. Agree to provide Social Security number (SSN) or taxpayer identification number (TIN) to Santa Clara University for 1098-T reporting purposes.

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

b. Click **Submit** and then **Done**.

18. Congratulations! You have completed the Onboarding tasks.
Go Broncos!