

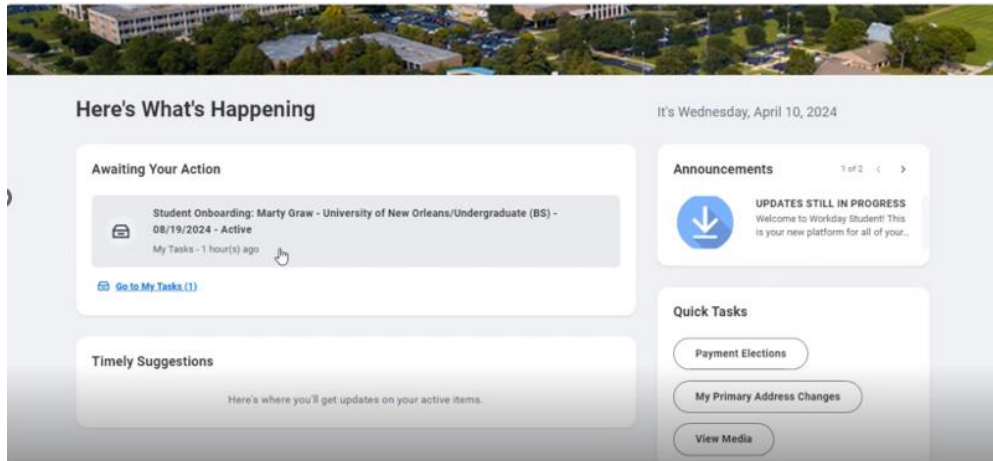


## New Student Onboarding

Welcome to the University of New Orleans. All new students will have an onboarding action waiting for them when they open their Workday Student profile under myapps.uno.edu. Once there, you will see a task “awaiting action” and begin going through the onboarding steps.

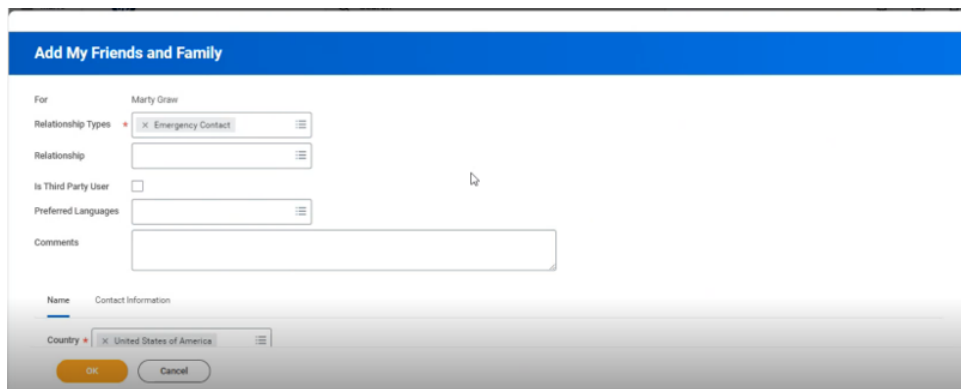
### Sign into Workday Student

1. Go to myapps.uno.edu
2. Click the Workday Student App
3. Once you have signed in, click the Student Onboarding task under “Awaiting Your Action” window



### Step 1: Review Friends and Family

1. Click the “Add” button. Every student is required to add at least an emergency contact with a phone number





2. Type in name of contact.
3. Click contact information and add phone number. This is required.

4. Scroll down to add email address.

5. Click **OK**. It will bring you back review the friends and family permissions page.
  - a. Here you can add additional family members, adjust permissions on a particular family/friend or remove an added member.



6. Once you have added everyone to your friends and family list, click **submit**.

## Step 2: Review Permissions for My Third Party (if applicable)

As a student, you have the ability to provide someone third party proxy access to your information. It is up to you what you allow someone to see on your profile. If you provide third party proxy access, you must provide their email address so that they may create their own proxy account.

1. **Click Add Permission** button next to your listed Family/Friend
2. **Select a person** you wish to provide third party access. **Click OK.**
3. **Tasks available for Third party user:**
  - a. **Make a payment** – This task gives access to make a payment on the student’s behalf.
  - b. **View Financial Aid Package** - 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.
  - c. **View Account Activity** - 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.
  - d. **View Student Statement** – This task gives access to view a student’s statement without courses on the student’s behalf.
  - e. **View Current Classes** – This task gives access to the student’s currently registered courses.
  - f. **View Student Grades** – This task gives access to the student’s grades.



4. After selecting the appropriate tasks for your third party proxy, click **OK**.
  - a. Please note that **you can go back to edit your selections at any point**.

Student: Marty Gray  
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 type="checkbox"/>

Buttons: OK, Cancel

5. This will bring you to a **Privacy Release Authorization Waiver**
  - a. You will need to type in a purpose for the waiver.
  - b. Example: I want this person to be able to make payments for me or I want this person to view my grades

The Family Educational Rights and Privacy Act (FERPA) is a federal law that governs third party access to a student's education records, the student's right to seek to have the records amended, and the student's right to have some control over the disclosure of personally identifiable information from the education records. When a student turns 18 years old or enters a postsecondary institution at any age, the rights under FERPA transfer from the parents or guardians to the student. More information about FERPA can be found on the University of New Orleans Registrar's website.

Marty Gray is allowing Test Testing to have access to the following tasks:

- Make a Payment
- View Current Classes
- View Financial Aid Package
- View Student Statement (Without Courses)

Purpose of Waiver:

By granting family or friends access to certain data in your Workday account, you may be giving up rights and privacy granted to you by the Family Educational Rights and Privacy Act (FERPA). This law governs what educational records the University of New Orleans is allowed to provide to third parties on behalf of you, the student. By granting third party access to your educational information, you are waiving these rights as they pertain to the parties you grant access to for the records indicated by you, the student. Access to these records will remain in place until you, the student, revoke the permission in Workday.

Confirm:

enter your comment:

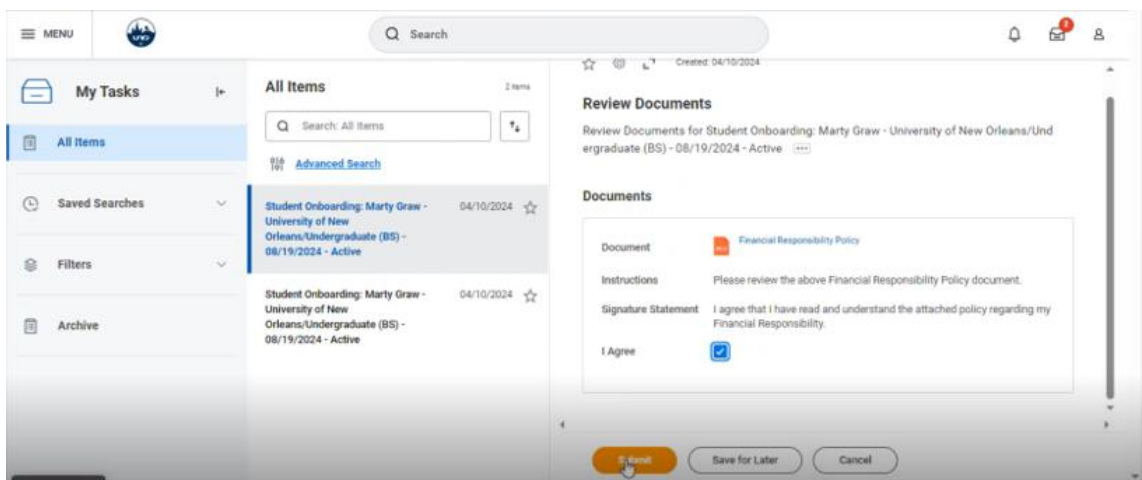
Buttons: Submit, Cancel



6. Click **Confirm**
7. Click **Submit**.
8. Click **Approve** to complete the task.

## Step 3: Review Documents

1. **Document 1: Financial Responsibility Policy**
  - a. Click the “**Financial Responsibility Policy**” document hyperlinked
  - b. **Review** the policy that pops up.
  - c. Once you have reviewed, **click the check box** next to “I Agree.”
  - d. Click **Submit**



2. **Document 2: Consent to Receive Form 1098-T Electronically**
  - a. Click the **check box** to confirm, “Yes, I have read and consent to the terms and conditions”
  - b. Click **Submit**
  - c. Click **Done**



The screenshot shows the Workday Student interface. On the left is a 'My Tasks' sidebar with 'All Items' selected. The main content area displays a task titled 'Consent to Receive Form 1098-T Electronically' created on 04/10/2024. The task description states: 'Students will receive the 1098-T tax forms electronically. This form is a tuition statement that reports the qualified educational expenses paid by or for a student. Please agree to electronic delivery by checking the box below. Electronic consent will again be requested during the 1098-T form preparation. When forms are generated, students can manage electronic copies of the 1098-T form using the Workday task, "Manage Paperless 1098-T" found using the search bar.' At the bottom, there is a checkbox labeled 'Yes, I have read and consent to the terms and conditions' which is currently unchecked, and 'Submit' and 'Cancel' buttons.

## Step 4: Review My Home Contact Information

1. Review address
2. Review phone number provided
3. Review home email address
4. If all is correct, click approve

The screenshot shows the 'Review My Home Contact Information' task in the Workday Student interface. The task title is 'Review My Home Contact Information' and it includes the instruction: 'Please review your home contact information and keep up to date as needed. Ensure the information below is up to date'. An 'Edit' button is visible. Below this, there is a table titled 'Addresses 1 item' with the following data:

Address	Usage	Visibility
2000 Lakeshore Dr. New Orleans, LA 70148 United States of America	Home (Primary) Mailing Street Address	Private

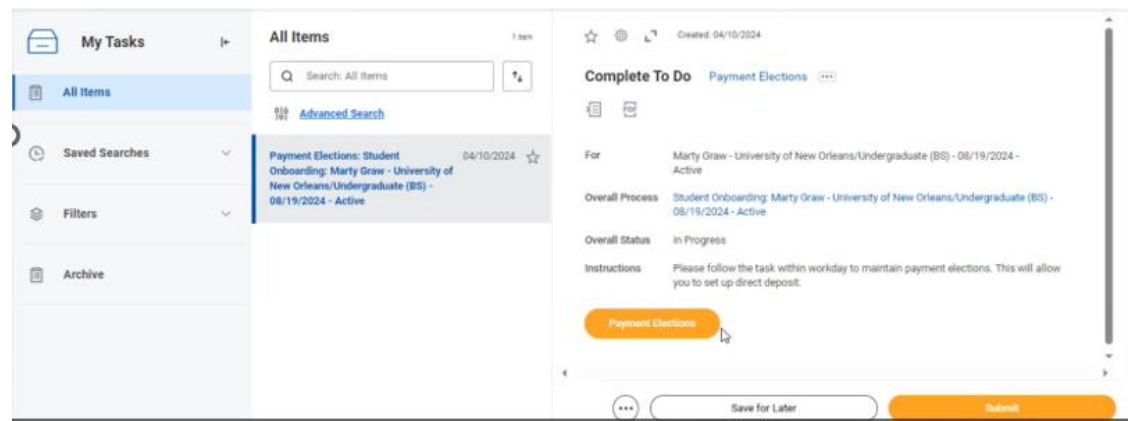
At the bottom of the task, there are 'Approve' and 'Cancel' buttons.



## Step 5: Setup Payment Elections

This is where you select how to receive payment for things such as payment, workstudy money, or any other sort of payments that would go to you as a student.

1. **Click Payment Elections button**
2. You will be asked to enter your bank information including routing number and account number to set up direct deposit. Once you have completed the required tasks for direct deposit, you will be brought back to the “Complete To Do” Payment election screen.
3. Click **Submit**



## Step 6: Review Government IDs

You will need to verify your Social Security Number or a comparable Tax ID number or input passport and Visa information.

1. **Go to view Profile at the top right side of your screen**
2. **Click the “Personal” tab** under your name on the left side of the screen.
3. **Select the “ID” tab** and verify that the ID is correct.
4. The number you type in will need to match our information already uploaded in the system. If it does not match, you will receive an error message and may need to follow up with the registrar’s office.





## 5. Click Submit

**My Tasks** | 1 Item

**All Items**

Search: All Items

Advanced Search

Review Government Ids: Student Onboarding: Marty Graw - University of New Orleans/Undergraduate (BS) - 08/19/2024 - Active

Overall Status: In Progress

Instructions: **Verify Your Government IDs**  
Your Social Security Number or other National ID should be listed in your student profile. Please take a moment to verify all of your appropriate Government IDs are in Workday. **THIS IS IMPORTANT. Financial Aid can be delayed if your Government IDs are not properly listed in Workday.**

HOW TO VERIFY YOUR ID:

- Click on your Profile icon in the top right corner of Workday
- Click View Profile in the popup window
- On the left side of your profile (in the left side navigation window) click on Personal
- Click on the IDs tab
- Your National/Government IDs will be listed here. Verify every important ID required is present
- Click Verify National ID and enter your ID to verify the data is accurate.

Why do I have to click Verify National ID? Why can't I just read my ID number?  
Your government/national ID is protected as a security measure to prevent identity theft. The numbers are hidden by default for security and safety. The system is con-

Save for Later Submit

## Step 7: Immunization Document Required

1. You will need to either **send your immunization records to [healthservices@uno.edu](mailto:healthservices@uno.edu)** or **complete the immunization waiver** via the link at: <https://www.uno.edu/campus-health/immunization-information>
2. If you have already completed this task. Please **click submit** at the bottom right.

**My Tasks** | 2 Items

**All Items**

Search: All Items

Advanced Search

Immunization Documentation Required: Student Onboarding: Marty Graw - University of New Orleans/Undergraduate (BS) - 08/19/2024 - Active

Sign Up for an Orientation Day: Student Onboarding: Marty Graw - University of New Orleans/Undergraduate (BS) - 08/19/2024 - Active

**Complete To Do** Immunization Documentation Required

For: Marty Graw - University of New Orleans/Undergraduate (BS) - 08/19/2024 - Active

Overall Process: Student Onboarding: Marty Graw - University of New Orleans/Undergraduate (BS) - 08/19/2024 - Active

Overall Status: In Progress

Instructions: **A hold has been placed on your student account that prevents you from registering for classes.**

Resolution Instructions:  
Submit required immunization documentation to the Office of Student Affairs (University Center 248) via email to [healthservices@uno.edu](mailto:healthservices@uno.edu) or via fax to 504-280-3975  
More information about the required immunizations can be found at <https://www.uno.edu/campus-health/immunization-information>

Save for Later Submit





## Step 8: Sign up for an Orientation Day

1. If you still have not registered for an orientation day, **click the link under related link “Sign up for an Orientation Day.”** It will bring you to the registration day sign up page, found here: <https://www.uno.edu/nse/step1> . Once you have registered for a day and time, you will **click submit**.
  - a. Here you will select a day and time that you wish to come to campus to register for your courses.
2. If you have already registered for a registration day, **click the submit button** on the bottom right of the screen.

My Tasks

All Items

Search: All Items

Advanced Search

Sign Up for an Orientation Day: Student Onboarding: Marty Graw - University of New Orleans/Undergraduate (BS) - 08/19/2024 - Active

Complete To Do Sign Up for an Orientation Day

For Marty Graw - University of New Orleans/Undergraduate (BS) - 08/19/2024 - Active

Overall Process Student Onboarding: Marty Graw - University of New Orleans/Undergraduate (BS) - 08/19/2024 - Active

Overall Status In Progress

Instructions Click the related link to sign up for a Registration Day. At Registration Day you will hear from important campus resources like financial aid and housing, meet with your advisor, and get registered for your classes.

Save for Later Submit

Date	Session Name	Time	Action	Date
June 6	First Year Registration Day Session 3- In-Person	8:00am - 5:00pm CT	SIGN UP	May 31
June 13	First Year Registration Day Session 4- In-Person	8:00am - 5:00pm CT	SIGN UP	June 7
July 11	First Year Registration Day Session 5- ONLINE	8:00am - 5:00pm CT	SIGN UP	July 5
July 18	First Year Registration Day Session 6- In-Person	8:00am - 5:00pm CT	SIGN UP	July 12
July 25	First Year Registration Day Session 7- In-Person	8:00am - 5:00pm CT	SIGN UP	July 19

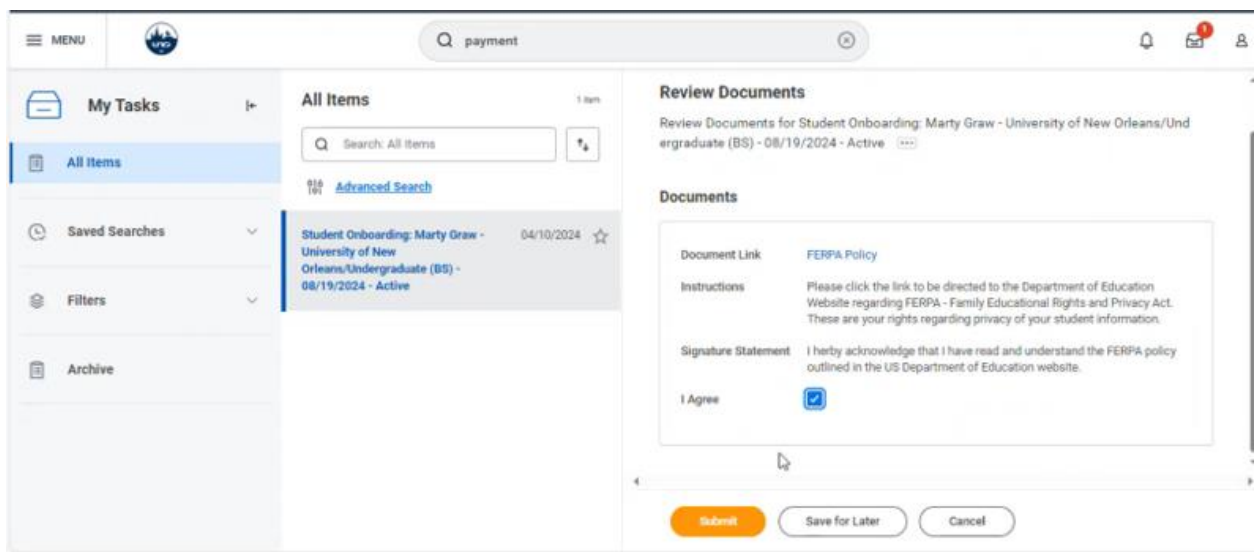
> What to expect at a First-Year Registration Day



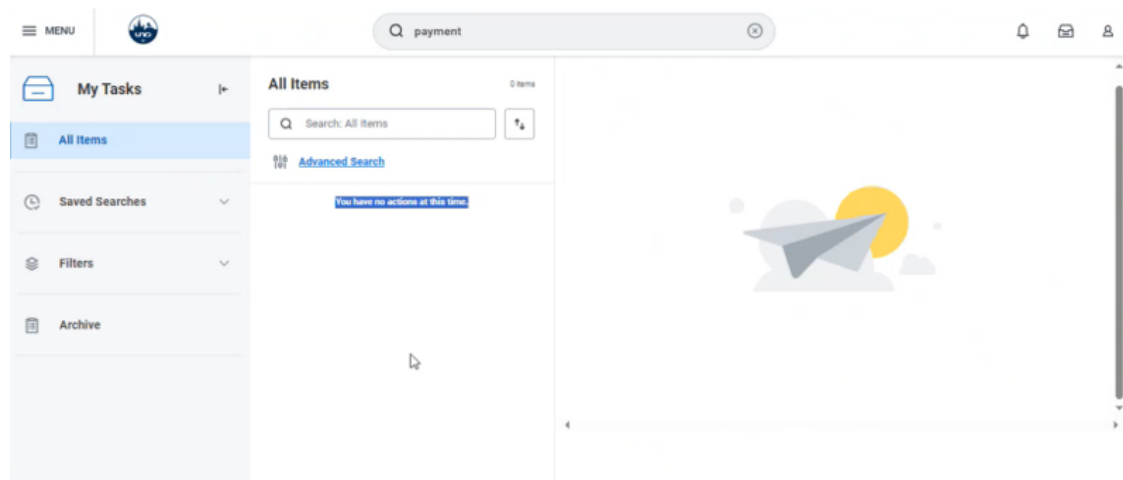
## Step 9: Review Documents – FERPA Policy (Family Educational Rights and Privacy Act)

This is a review of your rights as a student to privacy of student information.

1. You will **click the Document Link in blue “FERPA Policy,”** read the policy and go back to the Workday Page
2. Once back on the workday page, **click the “I agree” box.**
3. Click **Submit.**



After Step 9, Workday will bring you back to your “My tasks” bar and it should say “You have no actions at this time.” This means you have completed the onboarding process!



If you want to check if there other holds on your account, go back to your academics page, click the action items and holds tab, then Active Holds at the top of the screen.

