

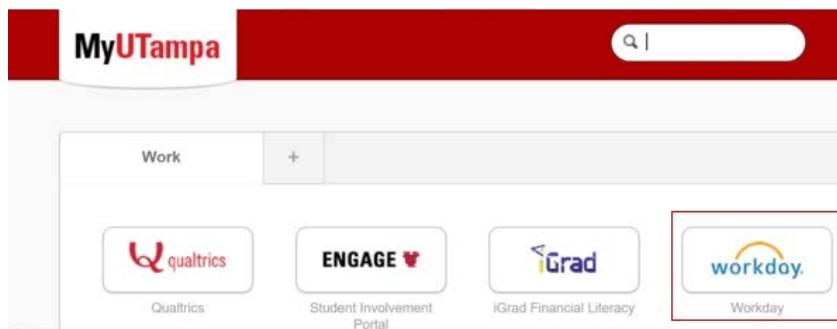
How do I set up third party access and manage permissions in Workday?

Question:

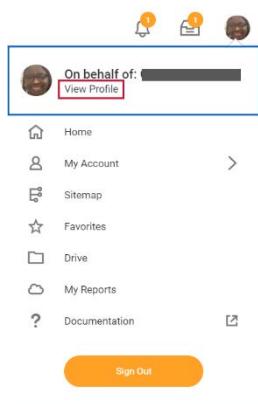
As a student, how do I setup third party access in Workday which authorizes someone to view financial aid, payments, etc.?

Answer:

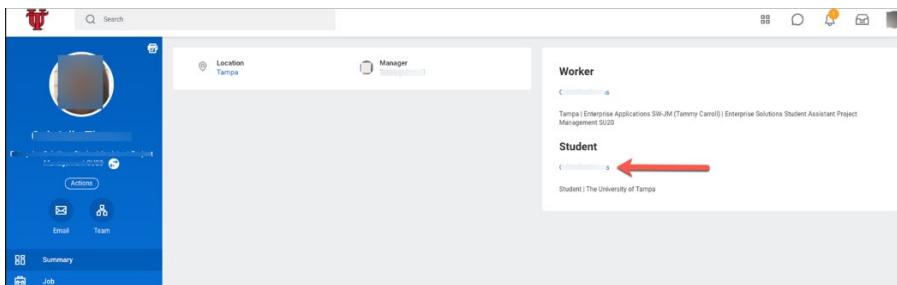
1. Login to [MyUTampa](#) and select the **Workday** icon.



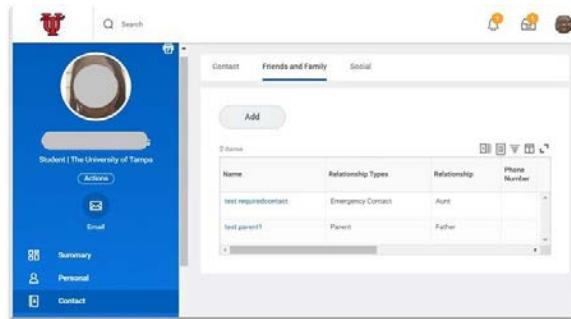
2. Click on **Photo** in the upper right-hand corner and then select ***View Profile**.



***Please note:** Students who are also Student Workers will have two profiles (Worker and Student). Please be sure to select the Student profile (not worker).



3. Select **Contact** in the left navigation bar, and then click **Friends and Family** tab. Click **Add** to create a new contact.



4. Indicate the **Relationship Type** and select the **Is Third Party User** box. Next, you will use both the Name and Contact Information tabs to add additional details.

A screenshot of the contact creation form. At the top, there are fields for "Relationship Types" (set to "Parent") and "Relationship" (set to "Parent"). Below these is a checkbox for "Is Third Party User" which is checked. An orange "Alert" button is visible. A note below the alert says: "You must still grant permissions to this third party user. After you complete this task, access the Manage Permissions for Third Party task that displays on your Friends and Family profile group." The "Contact Information" tab is selected. It contains sections for "Phone" and "Address". The "OK" button is highlighted with a red box.

5. In the **Contact Information** area, go to the **Address** section, and click **Add**. Enter your contact's address information. Complete all mandatory fields denoted by the red asterisk including the usage type.

Address

Effective Date *	07 / 27 / 2020
Country *	United States of America
Address Line 1 *	
1234 South Example Street	
Address Line 2	
City *	Tampa
State *	Florida
Postal Code *	33606
County	
Usage	
Type *	
Primary Work	

OK **Cancel**

6. **An email must be added.** In the **Email** section, click **Add** and enter your contact's email information. When you are done, click **OK**.

Email

Email Address *	Example@acd.net
Type *	Search
Primary Work	<input type="checkbox"/> Home <input type="checkbox"/> Work
Primary Home	
Use For	(empty)
Visibility	<input type="checkbox"/> Public
Comments	
Remove	
Add	

OK **Cancel**

7. At this point, you may review the contact information that you have added. If everything looks accurate, click **Done**.

Is Third Party User	Yes
Name	Contact Information
Effective Date	07/27/2020
Country	United States of America
Enter Western Script	Yes
Address Line 1	1234 South Example Street
Address Line 2	(empty)
City	Tampa
State	Florida
Postal Code	33606
County	(empty)

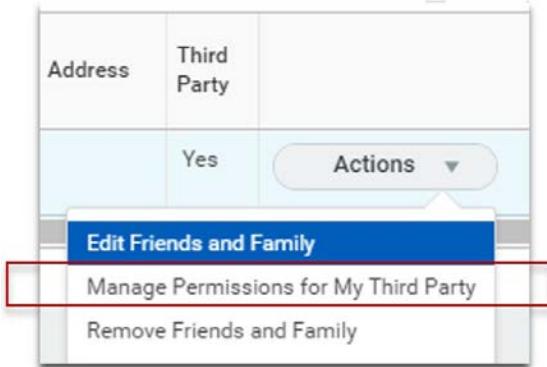
Done

8. Return to the **Contacts** area, and click the **Friends and Family** tab, where you will use the **Actions** area to designate the specific type of third-party access.

The screenshot shows a software interface with a navigation bar at the top. The 'Friends and Family' tab is active and highlighted with a red box. Below the navigation bar, there is an 'Add' button and a table listing two items. The table has columns for 'Email Address', 'Address', and 'Third Party'. The first row shows 'testparent1@yahoo.com' and '1234 South Example Street, Tampa, FL 33606' with 'Yes' in the 'Third Party' column. The second row shows 'Example@acd.net' and '1234 South Example Street, Tampa, FL 33606' with 'Yes' in the 'Third Party' column. The 'Actions' button for the second row is also highlighted with a red box.

Tip: This is also an opportunity to confirm that the Third-Party column (shown below) denotes a Yes.

9. On the **Friends and Family** tab use the horizontal scrolling bar and move all the way to the right until you see the **Actions** button. Click the **Actions** button and in the drop-down menu, select **Manage Permissions for My Third Party**.



10. Confirm that the correct name appears in the **Third-Party** field and click **OK**.

The screenshot shows a 'Manage Permissions for My Third Party' dialog box. It has two input fields: 'Third Party *' containing 'Students Parent' and 'Institution *' containing 'The University of Tampa'. At the bottom, there are 'OK' and 'Cancel' buttons, with 'OK' highlighted with a red box.

11. Under the **Tasks Available for Third Party Users** section, select the tasks you would like to permit your contact to access by selecting **Allowed** and select **OK**. Scroll down to see additional allowable options.

← Manage Permissions for My Third Party

Institution: The University of Tampa

Third Party: Students Parent

Student: Gabrielle Thomas

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 checked="" type="checkbox"/>

OK **Cancel**

12. Final step: Review the **FERPA Release Authorization Waiver**. In the **Purpose of Waiver** field, type in any additional records to release such as the ones suggested in the orange help text. Then check the **Confirm box**, click **Submit** and then click **Done**.

FERPA Release Authorization Waiver

In the box labeled "Purpose of Waiver", students have the option to paste any of the following record types to grant to the third-party: Grades, Transcript, or All educational records

Thomas is allowing Students Parent to have access to the following tasks:

[Make a Payment](#)
[View Financial Aid Package](#)

Purpose of Waiver Normal All educational records

In accordance with the Family Educational Rights and Privacy Act of 1974, the University will not disclose information from the student education records without the written consent of the student. Unless the student specifies otherwise, this consent will remain in effect throughout the student's enrollment at the University.

Confirm

Related Video(s):

How to add third party and manage permissions