

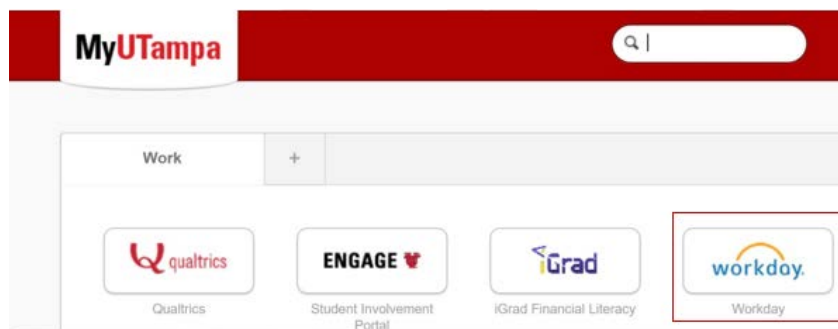
How do I set up third party access and manage permissions in Workday?

Question:

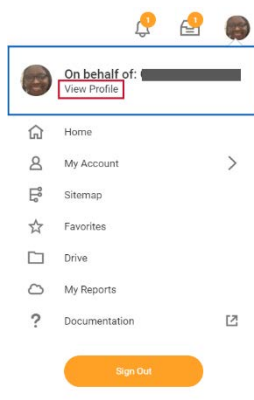
As a student, how do I setup third party access in Workday which authorizes someone to view financial aid, payments, etc.?

Answer:

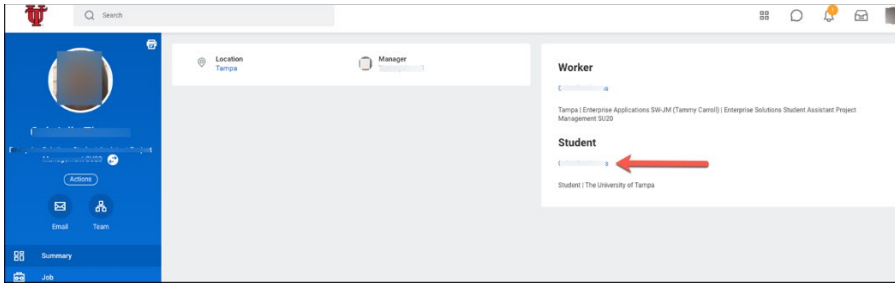
1. Login to [MyUTampa](#) and select the **Workday** icon.



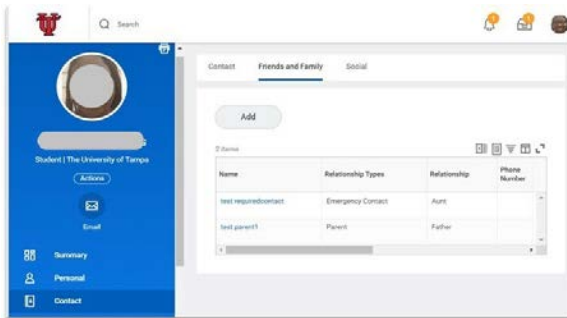
2. Click on **Photo** in the upper right-hand corner and then select ***View Profile**.



***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.

Relationship Types *

Relationship

Is Third Party User **Alert:**
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.

1 Alert

Name **Contact Information**

Phone

Address

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@acid.net

Type * Search

Primary Work Home

Primary Home Work

Use For (empty)

Visibility 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

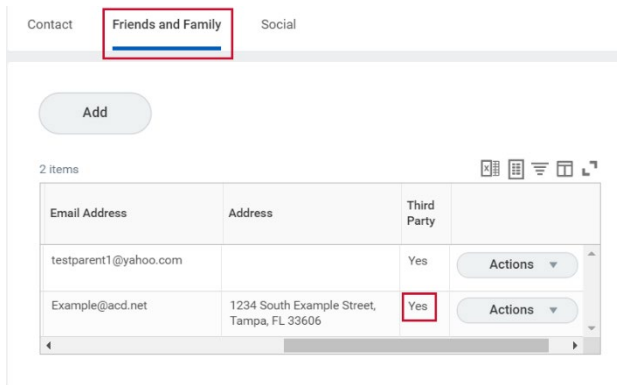
State Florida

Postal Code 33606

County (empty)

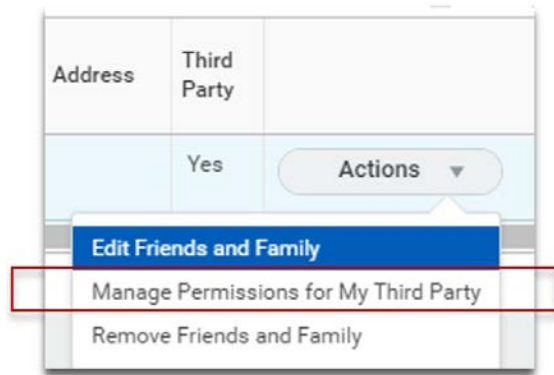
Done

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.

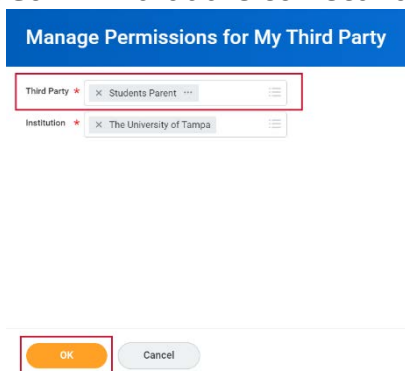


Tip: This is also an opportunity to confirm that the Third-Party column (shown below) denotes a Yes.

- 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**.



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



- 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 semester 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:

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

Submit Cancel

Related Video(s):

[How to add third party and manage permissions](#)