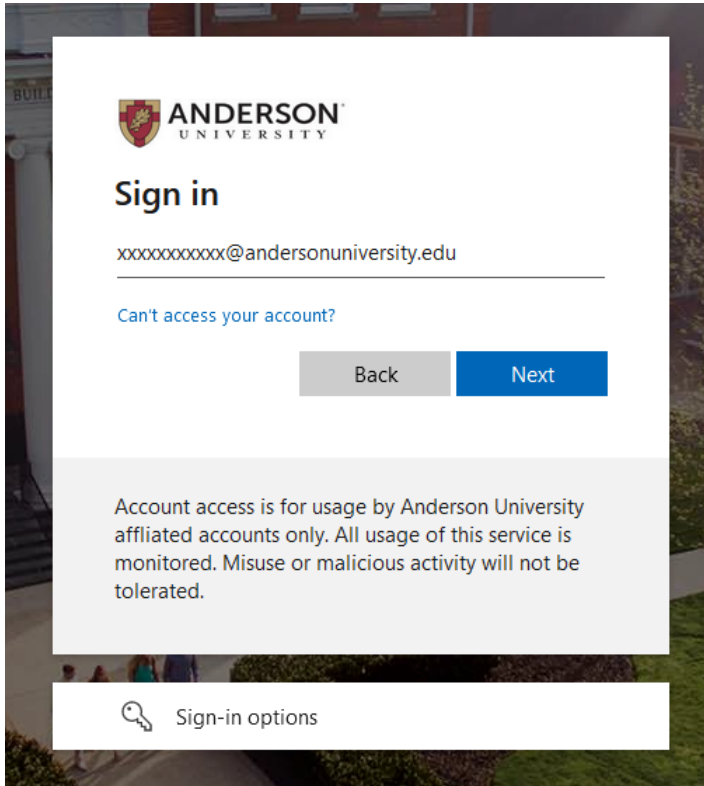


How to Add Third Party Access in Workday

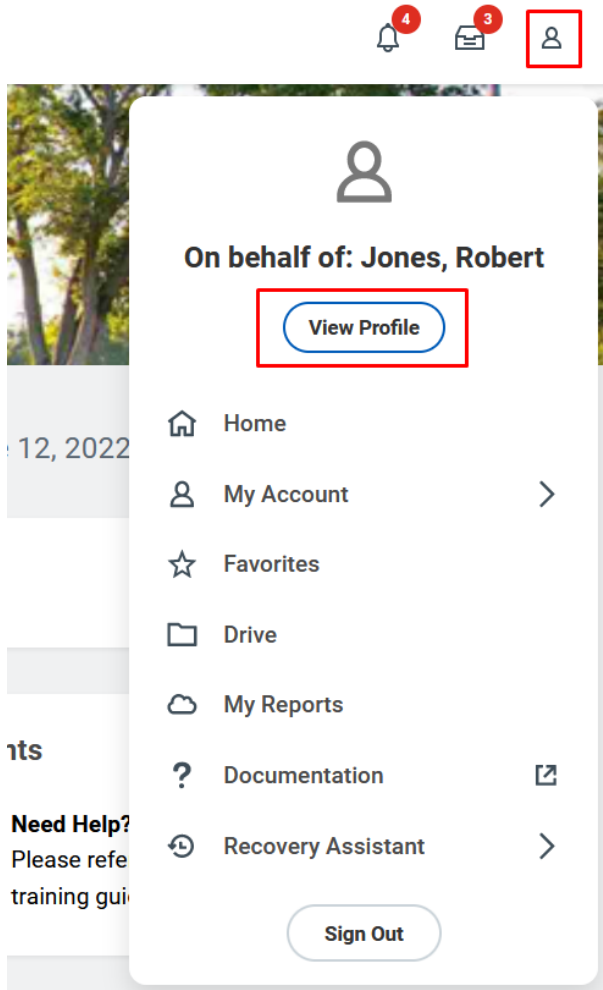
Last Revised: 6/16/2022

Workday allows students to provide other users, such as parents, grandparents, etc., third party account access to their student account in Workday. The steps below will guide through the setup process and provide more information on the various types of access.

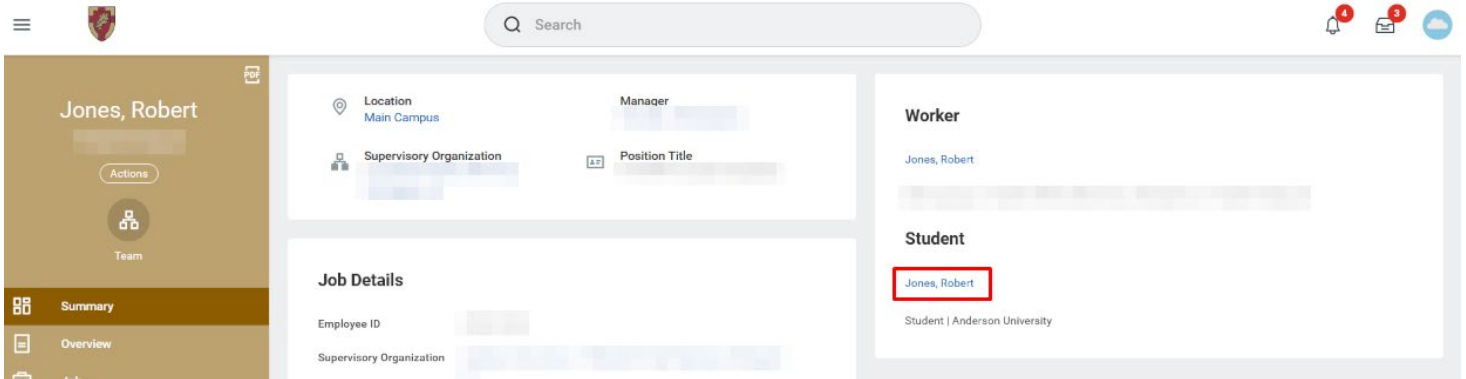
1. First, log into Workday with the link below. The username and password is the same used to log into the Anderson University email address.
 - a. <https://www.myworkday.com/andersonuniversity>



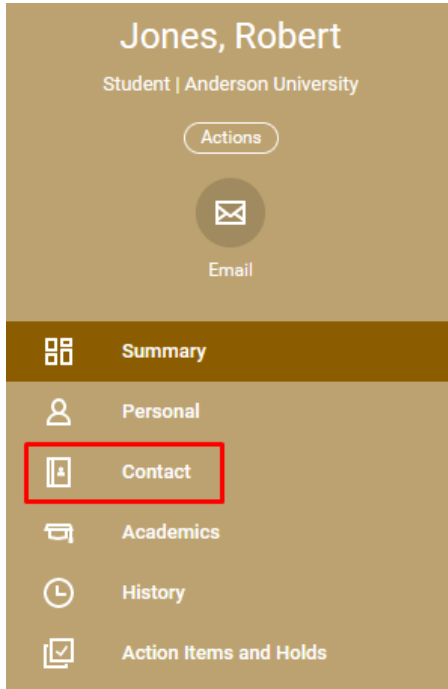
2. Select the profile on the top, right side of the screen, and click **View Profile**.



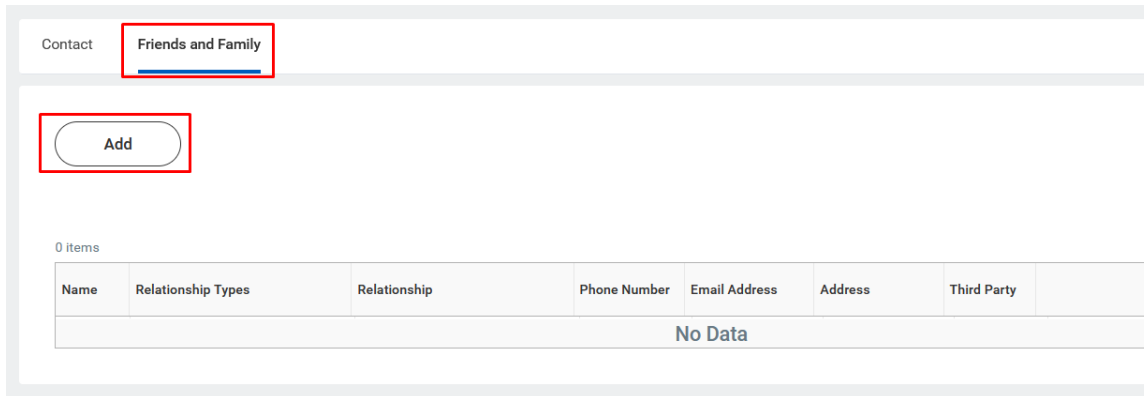
3. Student employees will need to select the student record before moving to step 4.



4. Next, select **Contact** on the left side of the profile.



5. In the middle of the profile, select **Friends and Family** and then **Add**.



6. Next, complete all required fields in the top section, and make sure to select **Is Third Party User**.

a. An alert will appear when selecting **Is Third Party User** to warn that third party permissions will need to be set up.

For Jones, Robert

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.

Preferred Languages

Comments



7. Next, complete the **Name** section.

Name Contact Information

Country * × United States of America ≡

Prefix ≡

First Name * Tom

Middle Name

Last Name * Jones

Suffix ≡

8. Now, complete the **Contact Information**, and select **OK**.

- a. Note: In order for Third Party Access to work, a valid email address must be entered. The email address will be used as the username when logging into Workday.

Email

Email Address *

Type * × Home ≡

Primary Work

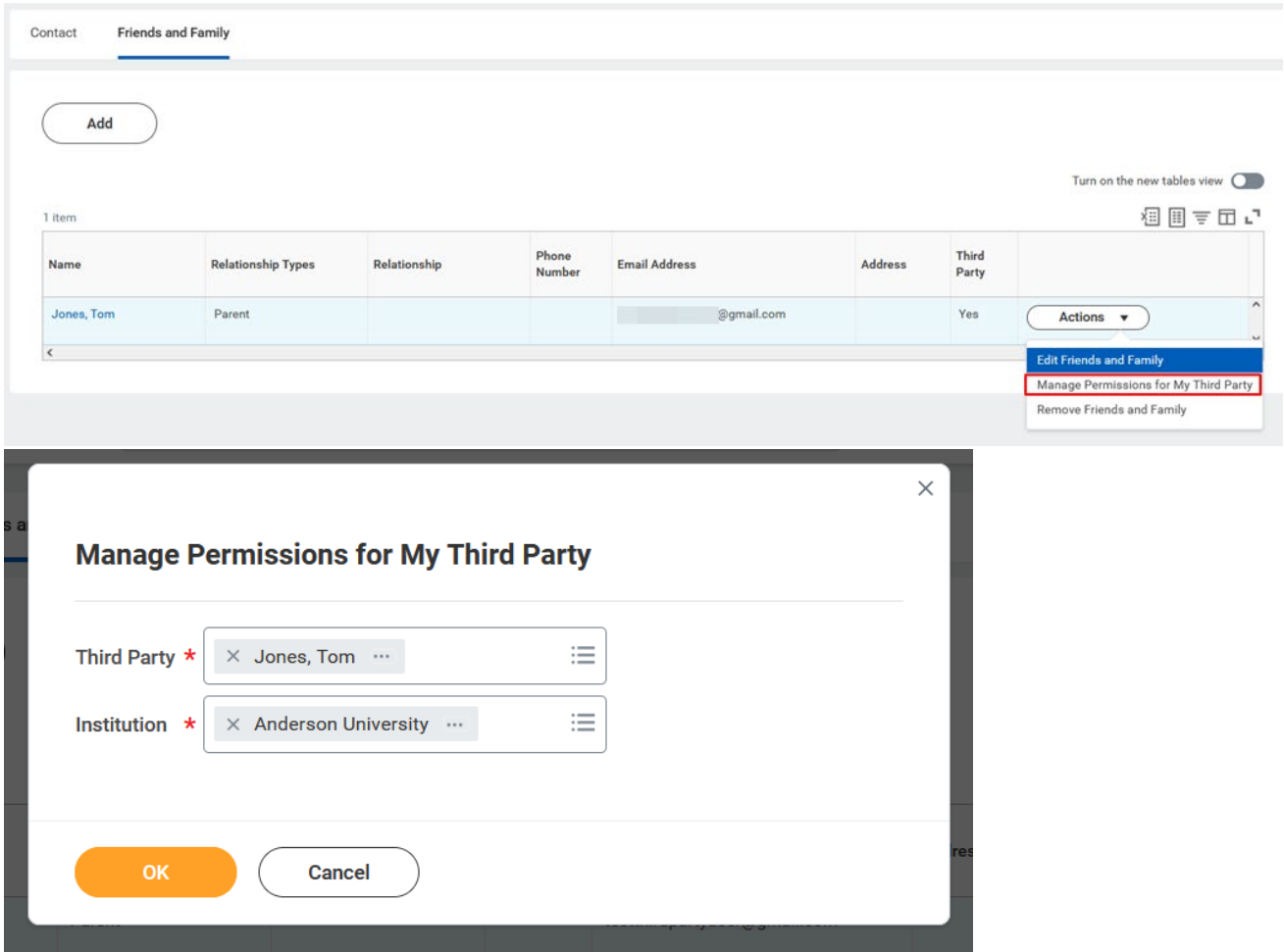
Primary Home

Use For ≡

Visibility Public

Comments

9. Next, hit **Done**. Then navigate to **Actions** → **Manage Permissions for My Third Party** → **OK**.



10. Check all the tasks to be provided to the third-party user and select **OK**. A description is listed below.

Task Name	Description
Make a Payment	This task gives access to make a payment on the student's behalf.
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.
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.
View Student Statement	This task gives access to view a student's statement without courses on the student's behalf.
	This option displays courses that the student is charged for on the student statement.
View Current Classes	This task gives access to the student's currently registered courses.
View Student Grades	This task gives access to the student's grades.

a. The following example allows the third party full access for the tasks above.

Manage Permissions for My Third Party 01/01

Institution Anderson University

Third Party Jones, Tom

Student Jones, Robert

Relationship Father

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

Task Name View Current Classes

Description This task gives access to the student's currently registered courses.

Allowed

Task Name View Student Grades

Description This task gives access to the student's grades.

Allowed

OK

Cancel

11. Next, the student should add his or her initials in the **Purpose of Waiver** field, check the **Confirm** box, and click **Submit**.

FERPA Release Authorization Waiver

Anderson University maintains appropriate educational records for each student and assures the confidentiality of such records consistent with the Family Educational Rights and Privacy Act (FERPA) of 1974 and the guide developed by the Committee on Records Management and Transcripts Adequacy of the American Association of Collegiate Registrars and Admissions Officers (AACRAO). Student records are confidential and will be released to persons outside the college based the access you are consenting to electronically. 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.

Jones, Robert is allowing Jones, Tom to have access to the following tasks:

- Make a Payment
- View Account Activity
- View Current Classes
- View Financial Aid Package
- View Student Grades
- View Student Statement (With Courses)

Purpose of Waiver *

Normal | B | I | U | A | : | ☰ | 🔗

BJ

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


Confirm *

 enter your comment

Submit

Cancel

12. Next, the third party will receive two emails regarding the new access into Workday. The emails will contain the username, password, and web address location for third party access. Examples of these emails are listed below.

 andersonuniversity@myworkday.com

To: [redacted]

You have been granted access to the Anderson University Workday system. This email may be generated if you are applying for employment at Anderson University or if you have a student wishing to provide third party access to his/her account.

Please note: Students control the level of access granted to the student record. Please work directly with the student to make any changes.

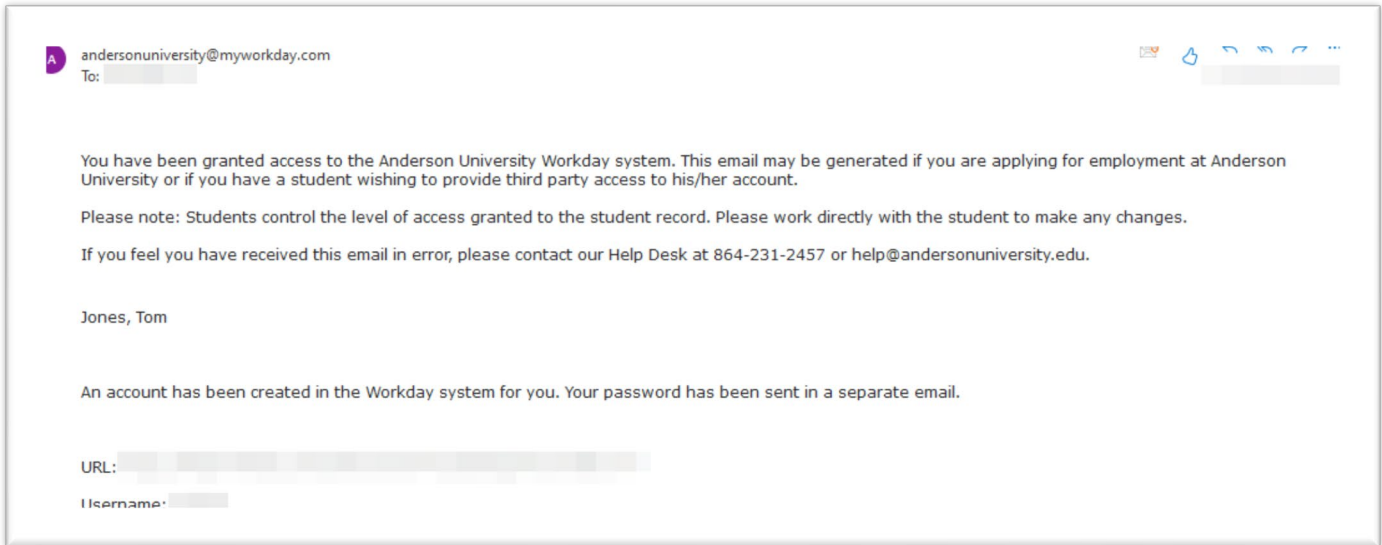
If you feel you have received this email in error, please contact our Help Desk at 864-231-2457 or help@andersonuniversity.edu.

Jones, Tom

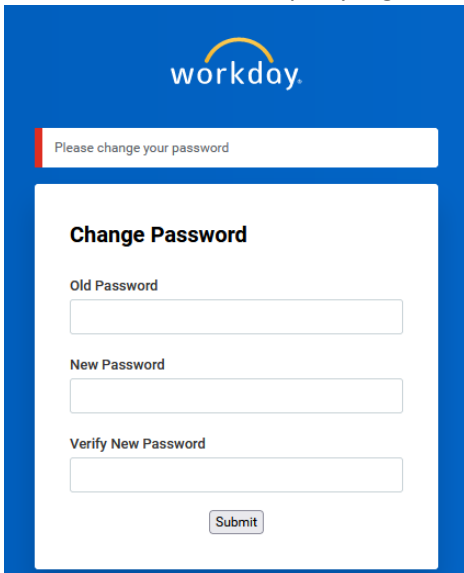
Please sign in to Workday with the following temporary password and the username you were provided separately. You will be prompted to reset your password.

URL: [redacted]

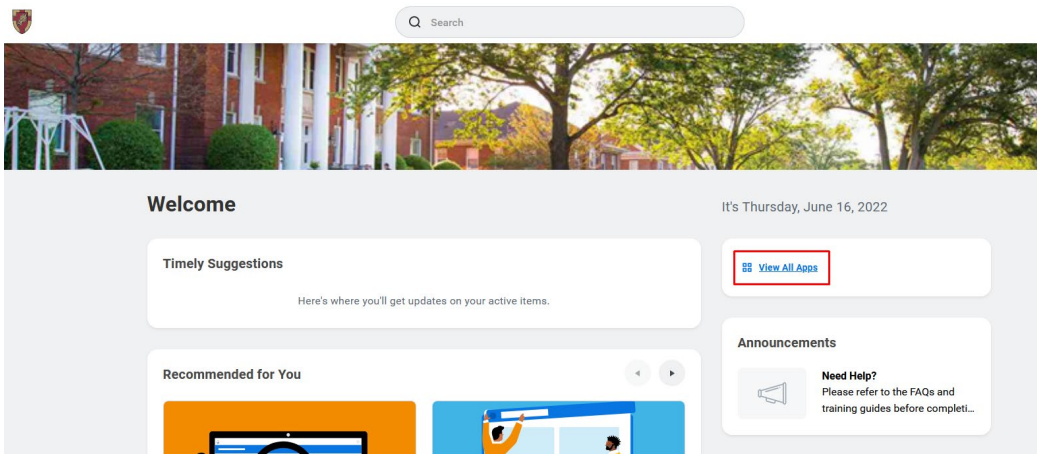
Temporary Password: [redacted]



13. When the third party logs into Workday the first time, they will be asked to change the account password.



14. Once logged in, the third party can navigate to **View All Apps** to view the information to which the student has provided access.



All Apps 



**Academics for
Third Party**

**Finances for
Third Party**



Favorites



Career