Managing Friends and Family Contact Information & Third Party Permissions (Students)

Students can manage their friends and family contact information and grant Third Party permissions to their contacts in Workday.

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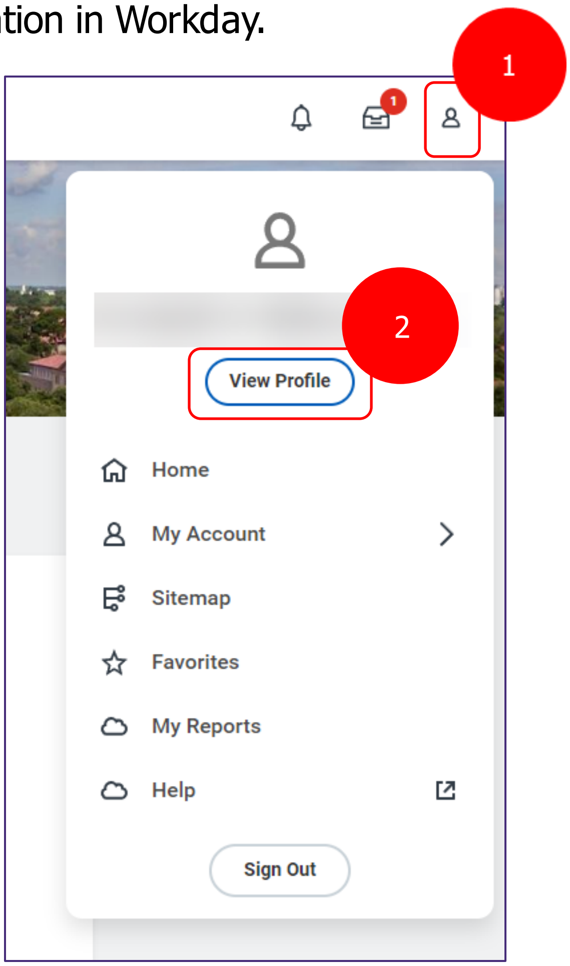
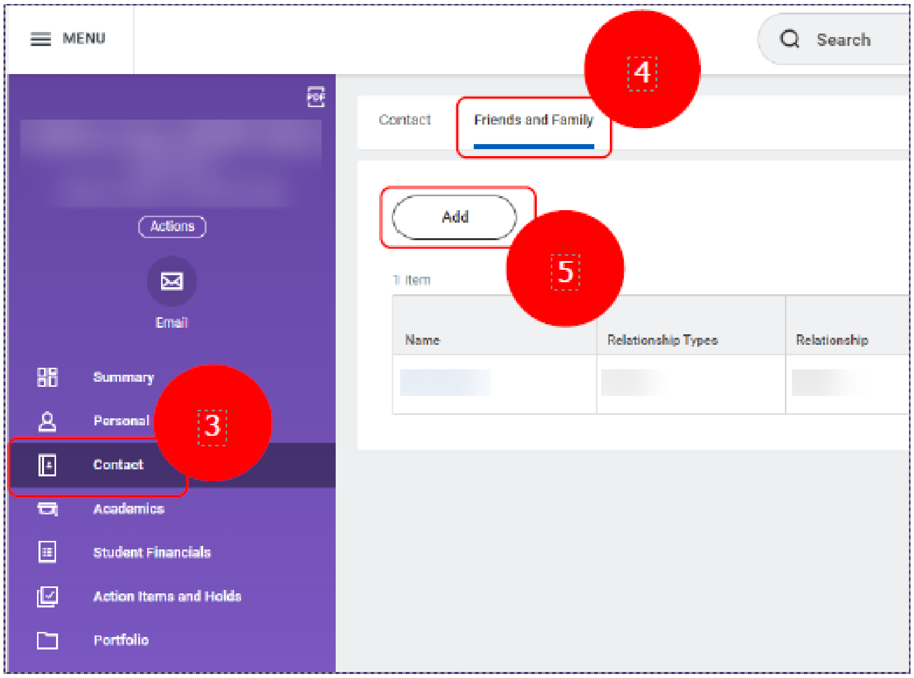
Adding & Editing Friends and Family Contacts

Students can add and edit third party contact information in Workday.

1. On the Workday home page, click the **Profile** icon.
2. Click **View Profile.**
3. Navigate to the purple column on the left-hand side of the screen and click **Contact**.
4. Once in the **Contact** section, click **Friends and Family**.
5. To add contacts, click **Add** on the top of the **Friends and Family** section.



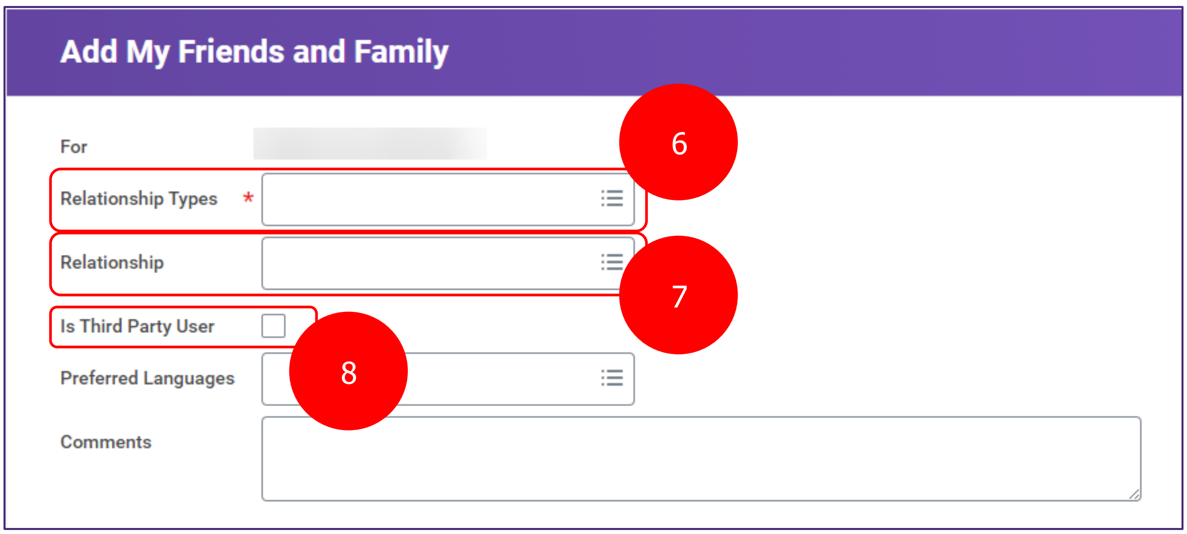


Adding & Editing Friends and Family Contact (cont.)

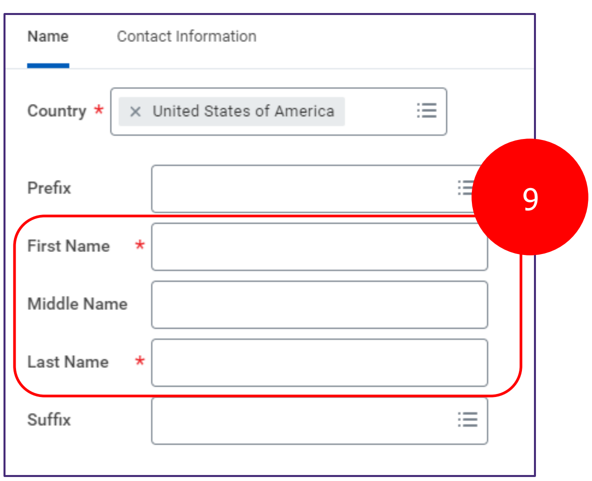
6. Select the **Relationship Types** and make the appropriate selections from the **drop down**.

7. Select the **Relationship** and specify the relation from **drop down**.

8. Mark **Is Third Party User** checkbox to assign contact as a Third Party User. Third Party Users may be granted the permission to view or complete tasks on a student's behalf.



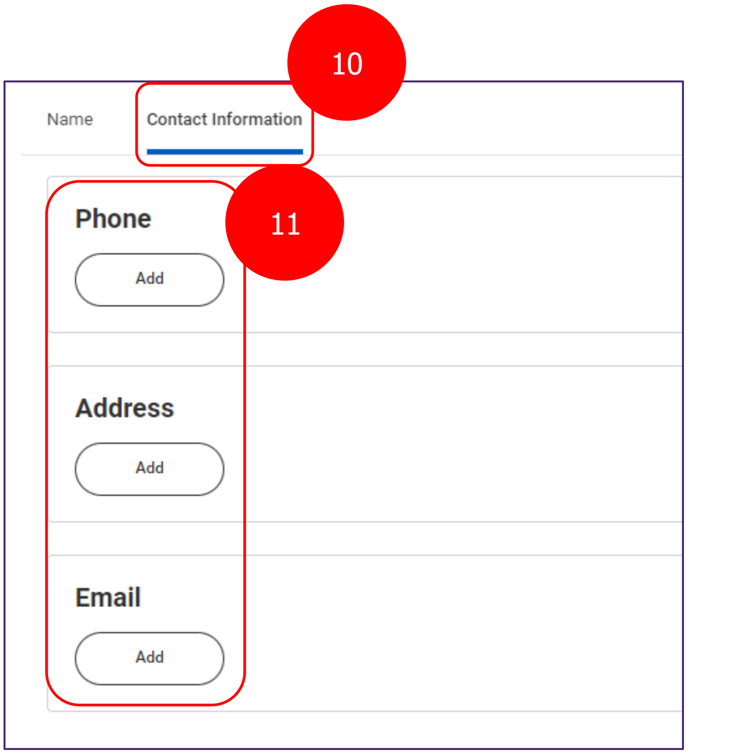
9. Complete Contact Name details.



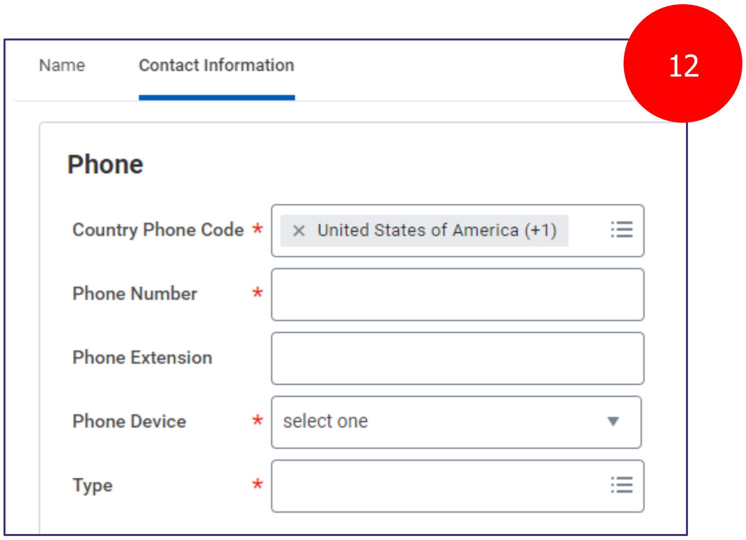
Adding & Editing Friends and Family Contact (cont.)

10. Click **Contact Information**.

11. Click **Add** for each type of contact modality.

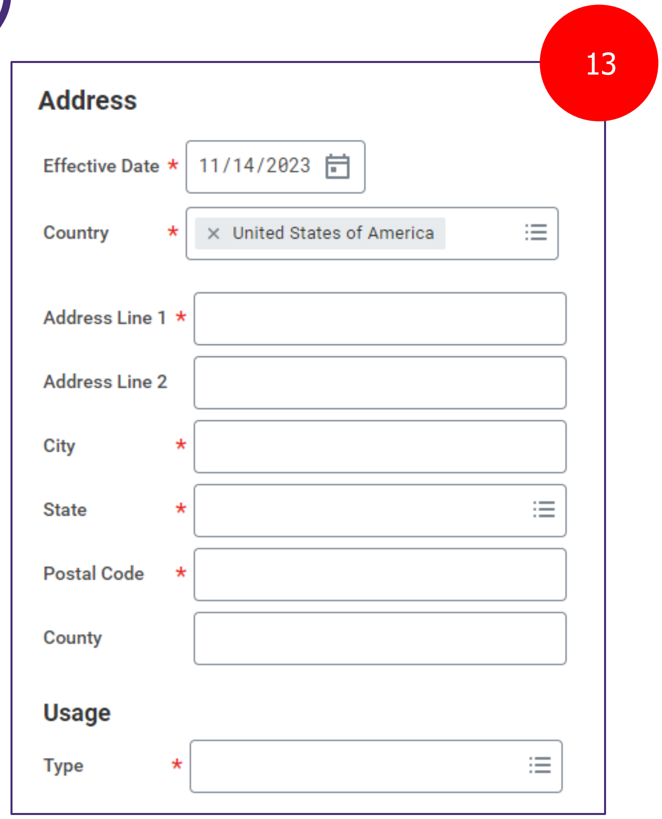


12. Under **Phone,** enter Phone Number, Phone Device, and Type.

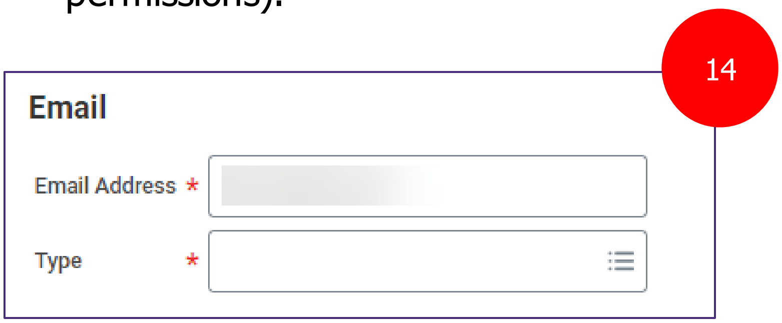


Adding & Editing Friends and Family Contact (cont.)

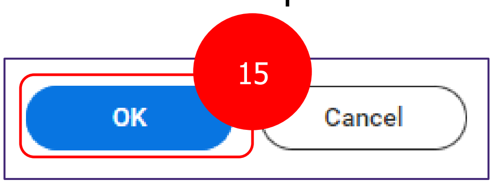
13. Under **Address,** enter the Effective Date, Address, and Type.



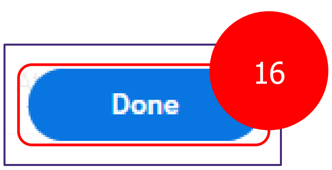
14. Under **Email,** enter Email Address and Type (required for third party permissions).



15. Click **OK** to complete the form.



16. Click **Done** to exit task.



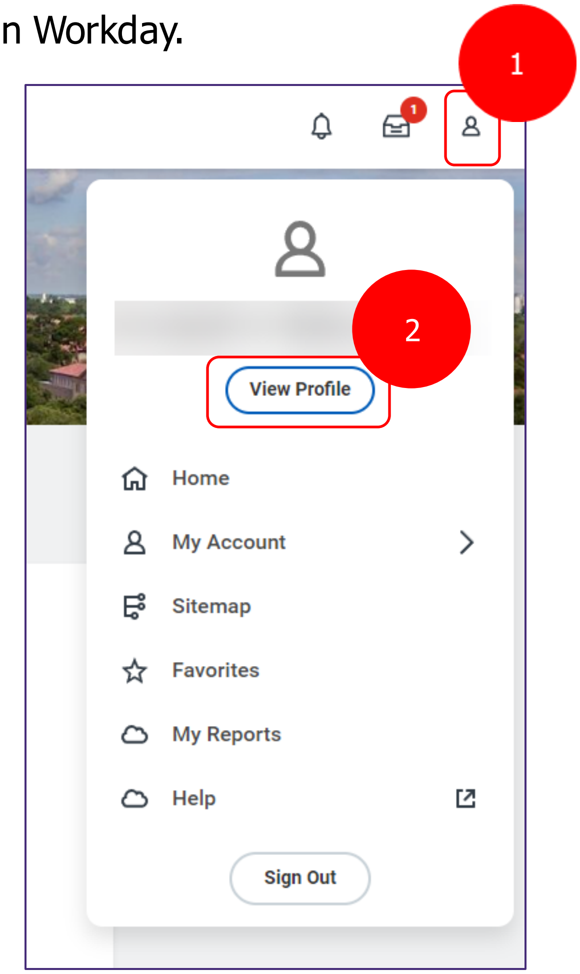
Helpful Hint:

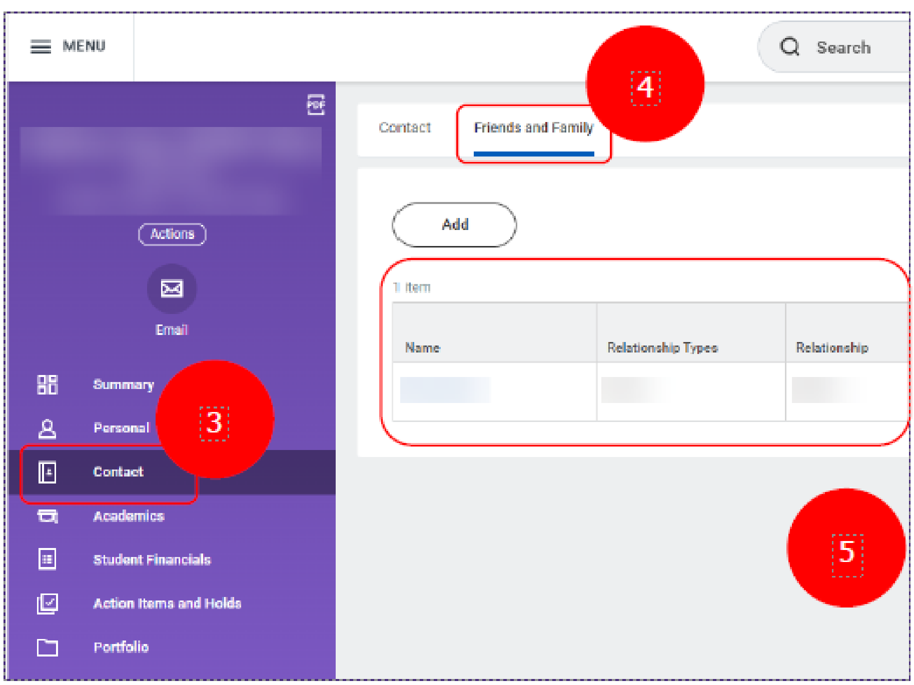
To Delegate Third Party Permissions to a contact, you must enter an email address. It is important to enter a phone number & address as well, especially if the person is your emergency contact.

Managing Third Party Permissions

Students can manage third party access permissions in Workday.

1. On the Workday home page, click the **Profile** icon.
2. Click **View Profile.**
3. Navigate to the purple column on the left-hand side of the screen and click **Contact**.
4. Once in the **Contact** section, click **Friends and Family**.
5. View Contacts in the **Friends and Family** tab.

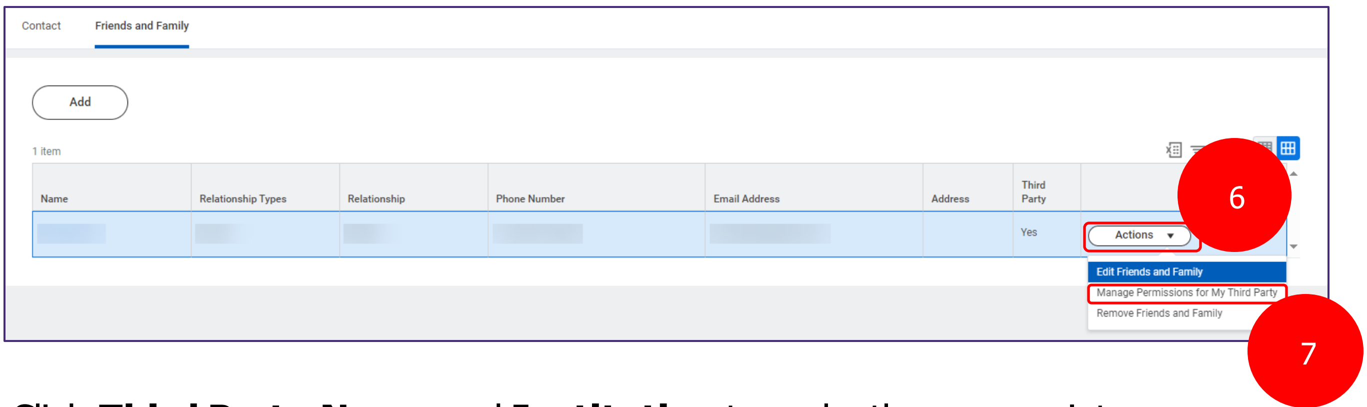




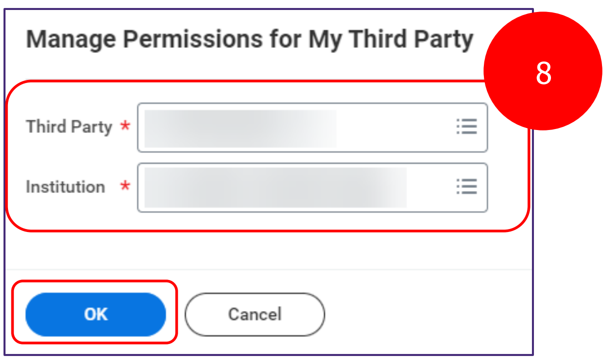
Managing Third Party Permissions (cont.)

6. Click **Actions** for relevant contact.

7. Select **Manage Permissions for My Third Party**.



8. Click **Third Party Name** and **Institution** to make the appropriate selections from the **drop down,** then click **OK**.



9. Review Permission Types and Descriptions:

    - Make a Payment, View Financial Aid Package, View Account Activity, View Student Statement, View Current Classes, View Student Grades, and Generate Unofficial Transcript.

10. Mark the desired **Allowed** Checkbox(es) for any or all these Permission Types.

11. Click **OK**.

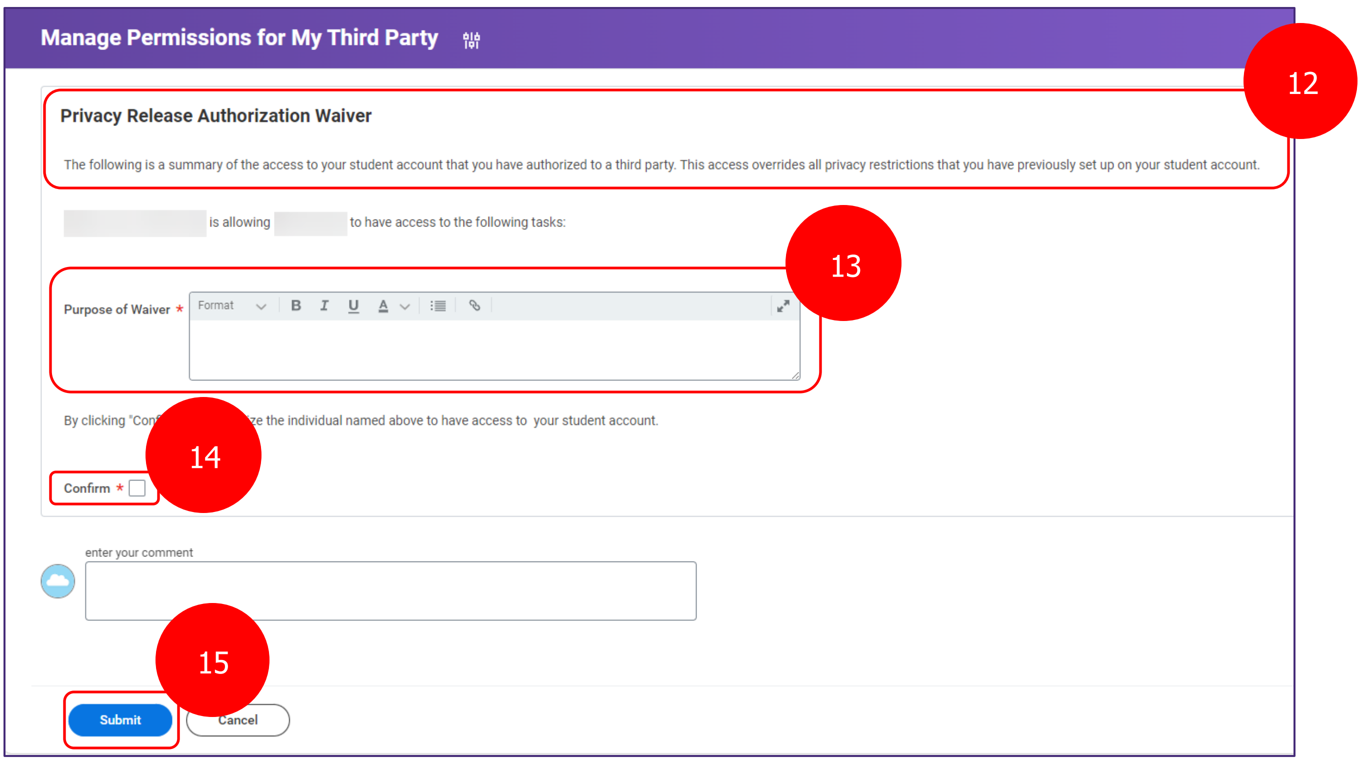
Managing Third Party Permissions (cont.)

12. Review the **Privacy Release Authorization Waiver** & **Third-Party Authorization**.

13. Enter the **Purpose of Waiver** description. (Sample statement: "I authorize this request")

14. Click the **Confirm** checkbox.

15. Click **Submit**.



Helpful Hint:

Delegating Third Party Permissions is a two-step process. First, you must assign contacts as Third Party User, then you can manage their permissions. This allows the Third Party User to perform actions on your behalf.

Managing Third Party Permissions (cont.)

- *How will my Third-Party contact login to Workday?*
  - The Third Party user should receive two emails from Workday when granted Third Party access by their student. The first email includes the login link and login details, while the second email contains the password.
  - Using the provided link and login credentials, they will enter a simplified version of our Workday Homepage, offering access to only specific functions they've been authorized to use, such as viewing student grades.
  - Kindly contact the **OIT Help Desk** (it@lsue.edu) for assistance in resolving any technical issues related to Third Party access.