

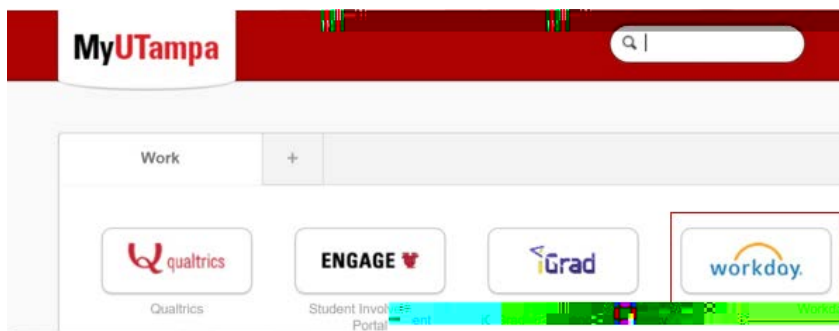
How do I set up third party access and manage permissions in Workday?

Question:

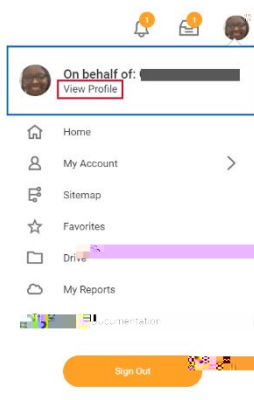
As a student, how do I setup third party access in Workday which authorizes someone to view financial aid, payments, etc.?

Answer:

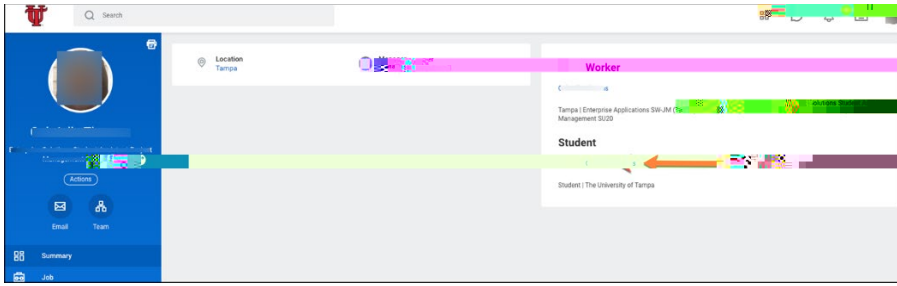
1. Login to [MyUTampa](#) and select the **Workday** icon.



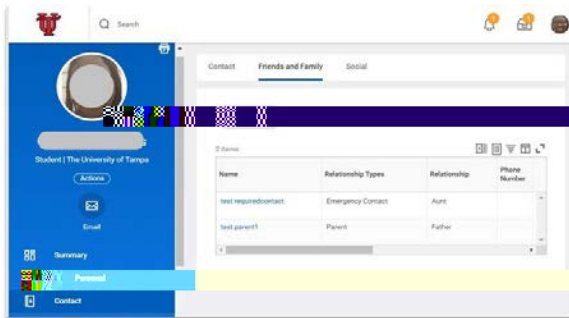
2. Click on **Photo** in the upper right-hand corner and then select ***View Profile**.



*** 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 Third Party task that displays on your Friends and Family profile group.

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

Address Line 2:

City: Tampa

State: Florida

Postal Code: 33606

County:

Type:

Primary Work:

- 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@acod.net

Type: Search

Primary Home: Work

Use For: (empty)

Visibility: Public

Comet88

Add

Cancel

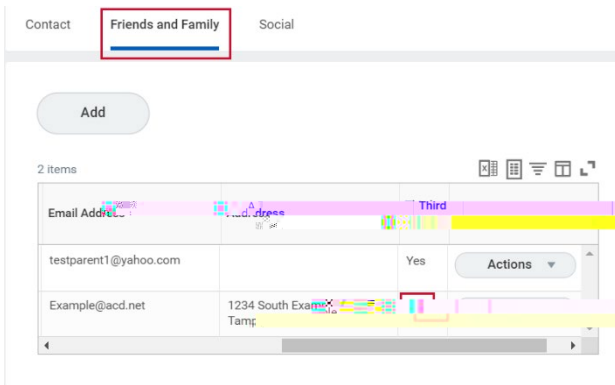
- At this point, you may review the contact information that you have added. If everything looks accurate, click **Done**.

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
	Address Line 2: (empty)
	City: Tampa
	State: Florida
	Postal Code: 33606
	County: (empty)

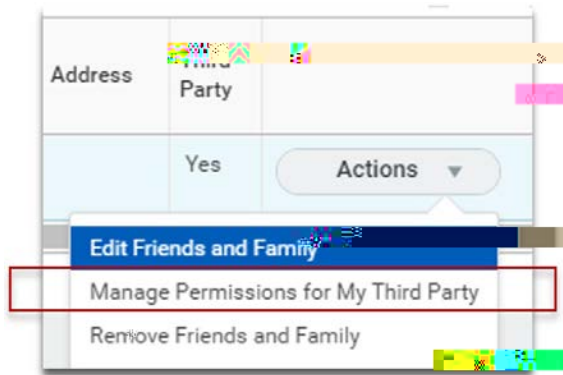
Done

- 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.

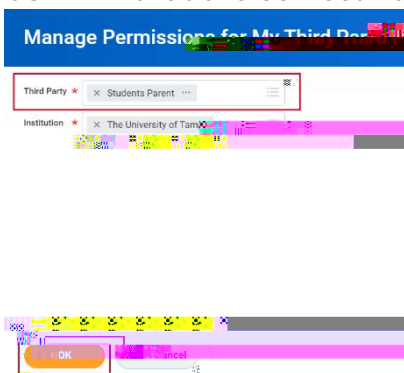


Tip: This is also an opportunity to confirm that the Third-Party column (shown below) denotes a Yes.

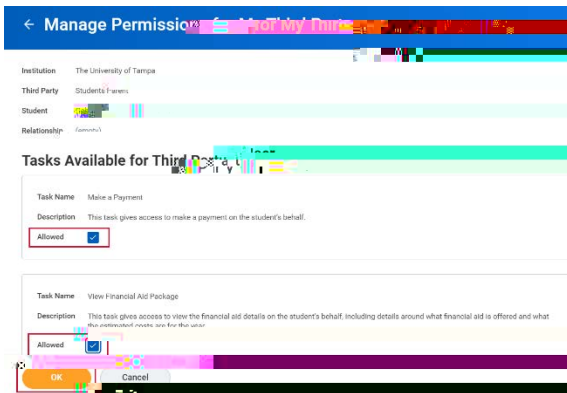
- On the **Friends and Family** tab use the horizontal scrolling bar and move all the way to the right until you see the **Actions** button. Click the **Actions** button and in the drop-down menu, select **Manage Permissions for My Third Party**.



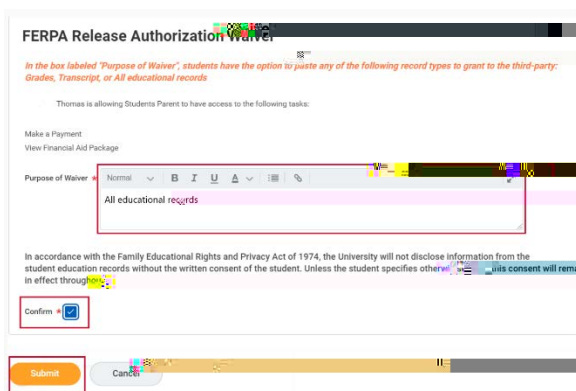
- Confirm that the correct name appears in the **Third-Party** field and click **OK**.



- 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.



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**.



Related Video(s):

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