

Student Financial Services

Adding a Third-Party and Setting Permissions in Workday

There are three required steps to set up third-party access for a parent, guardian, or other designated third-party user.

1. Navigate to your profile from the Workday home page and select View Profile.
2. Select Contact from the menu on the left.
3. Select Friends and Family.
4. Select Add.
5. Select a Relationship Type from the drop-down menu then check Is Third Party User box.
6. In the Name tab, enter the Country, First Name, and Last Name of the third-party user.
7. In the Contact Information tab, enter Email (required), and Phone or Address (optional).
8. Select OK and Done.
9. After you've added a third party, you must grant them permissions.
 - a. Select Actions next to the third party's name, followed by Manage Permissions for My Third Party then select OK.
 - b. Check the box next to Allowed for each task you want the third-party user to have access to. Select OK when finished.
 - c. You will then be prompted to provide the Purpose of Waiver and confirmation by checking the box. Select Submit when ready.
10. You can edit permissions for each third party you designate at any time by following steps 1-3, followed by 9a-9c.