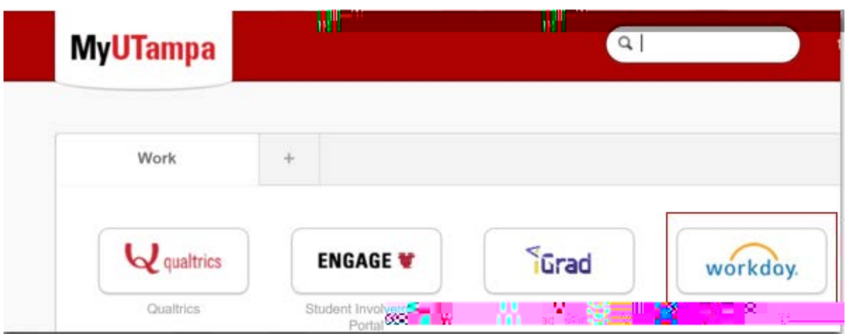
How do I set up third party access and manage permissions in Workday?

Question:

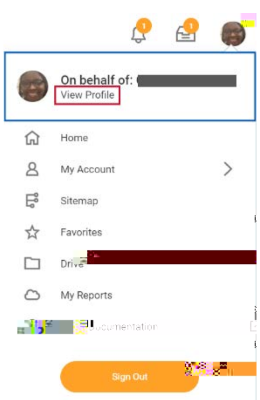
As a student, how do I setup third party access in Workday which authorizes someone to view financial aid, payments, etc.?

Answer:

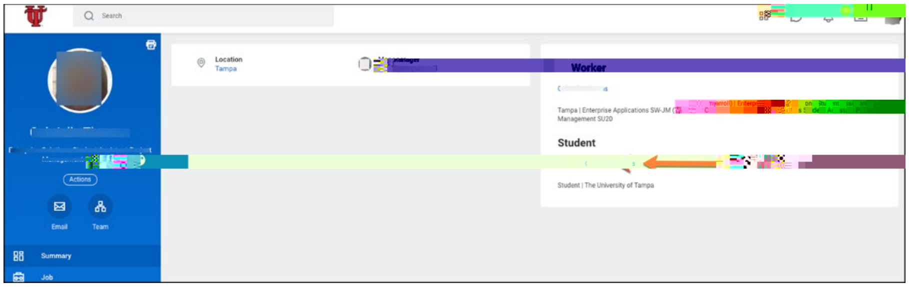
1. Login to MyUTampa and select the Workday icon.



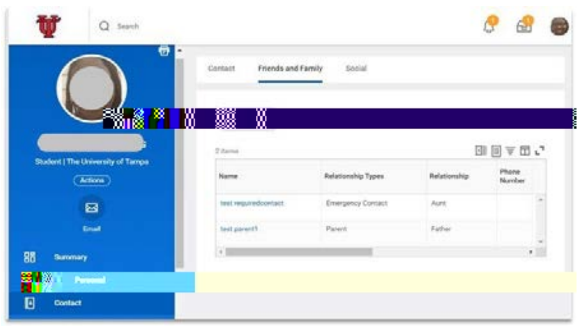
2. Click on Photo in the upper right -hand corner and then select *View P rofile .



* 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).



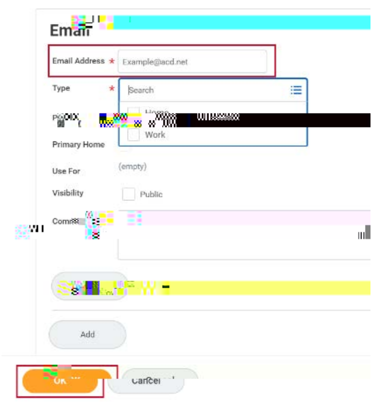
3. Select Contact in the left navigation bar, and then click Friends and Family tab. Click Add to create a new contact.



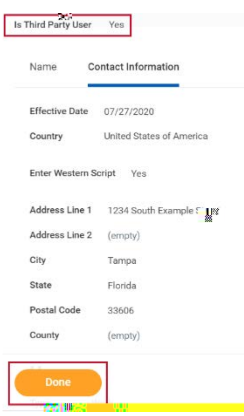
4. Indicate the Relationship Type and select the Is Third Party User box. Next, you will use both the Name and Contact Information tabs to add additional details.

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.

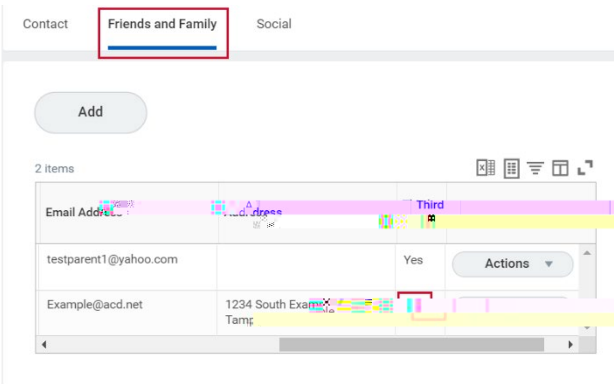
6. An email must be added. In the Email section, click Add and enter your contact's email information. When you are done, click OK.



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

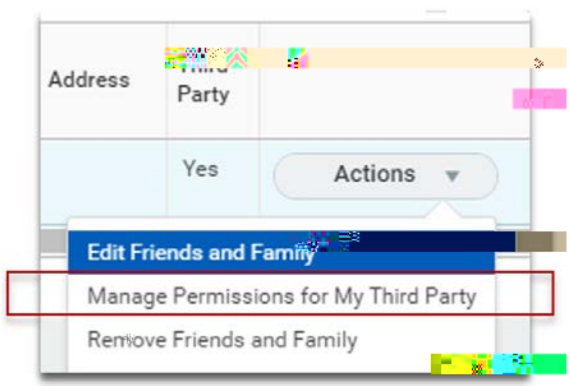


8. Return to the Contacts area, and click the Friends and Family tab, where you will use the Actions area to designate the specific type of third-party access.

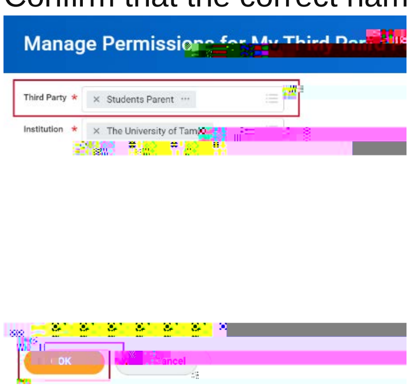


Tip: This is also an opportunity to confirm that the Third -Party column (shown below) denotes a Yes.

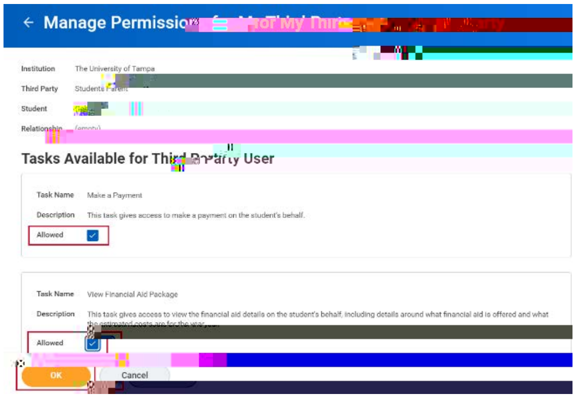
9. On the Friends and Family tab use the horizonal scrolling bar and move all the way to the right until you see the Actions button. Click the Actions button and in the drop -down menu, select Manage Permissions for My Third Party .



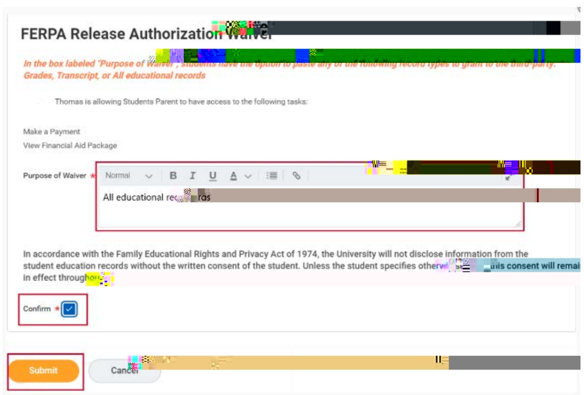
10. Confirm that the correct name appears in the Third -Party field and click OK.



11. 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]