



Purpose: Manage third-party (also called “proxy”) access to allow parents, guardians, or others to view and pay your bill, view your financial aid, and/or view your grades or class schedule.

- Helpful Hints:**
- You decide who to give access to your information, and you can [change or remove that access](#) at any time.
 - You may authorize multiple third-party users and can set different access for each. Each user needs a different email address.
 - **Having trouble? View the [parent/proxy troubleshooting guide](#).**

QUICK STEPS

Workday > Profile picture > **View Profile** > **Contact** tab on profile (click “more”) > **Friends and Family** tab > **Add** > Choose relationship type, select **Yes for Is Third Party User**, and enter person’s name > **Contact Information** tab to add email address > OK > **Manage Permissions for My Third Party** > Choose allowed tasks > OK > **FERPA waiver** > click **Confirm** > **Submit**

OVERVIEW

There are three steps to the process of setting up your parent or another third-party proxy user:

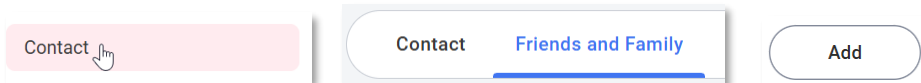
1. **Add to Friends and Family:** Give access to some of your information in Workday to a parent/guardian or others by adding them to your Workday “Friends and Family.”
2. **Manage permissions:** Decide what access you want them to have to your information: bills, make payments, view financial aid, view course schedule and/or view grades. This is called “manage permissions” in Workday.
3. The person you give access to will receive two emails: one with their new Workday username and one with a temporary password. These emails will be sent automatically as soon as you manage permissions.

*If another Calvin student already added the same person as a proxy user, you will receive an additional Workday task to link the proxy accounts together. The proxy user will use the same proxy username and password to access authorized information about multiple students. **To create linked proxy accounts, the third party’s name and contact information must match exactly with the information the other student provided. See [below](#) for more information.***

ADD THIRD-PARTY PROXY ACCESS:

ADD PERSON TO YOUR FRIENDS AND FAMILY

1. In [Workday](#), go to your **student profile** by clicking your picture (or cloud icon) in the upper right corner of the Workday header, then click **View Profile**.
2. Click **Contact** on your profile sidebar menu. (You may need to click “More” to see it.) Then click the **Friends and Family** tab at the top of the screen.
 - a. To add a new person, click **Add**.





3. On the next screen, enter information about the person you want to add as a proxy user.

a. Enter their details. Not all fields are required. At minimum, you must include:

- **Relationship Type:** choose any that apply
- **Is Third Party User:** select **Yes**

Is Third Party User * ☒ Yes ☐ No

b. Enter the person's **Name**: first name and last name are required.

→ **IMPORTANT:** If another student, such as your sibling, has the same third-party proxy, you must both enter their name in *exactly* the same way, including title, middle name, etc.

c. Click **Contact Information**. At minimum, you must include this person's **email address**. This email will be used to set up and log into their third-party proxy account.

Name Contact Information

→ **IMPORTANT:** Each proxy user must have their own email address! If you are adding multiple people, you must use a different address for each person.

→ If your parent/proxy user is a Calvin employee, please use a personal email address instead of their Calvin work account.

→ If another student, like a sibling, has already added this person, you must match the contact details they already submitted. See [next page for additional instructions for when a person has already been added by someone else](#).

d. Click **OK** to move to the next step and manage permissions for this person.

MANAGE PERMISSIONS FOR YOUR THIRD-PARTY PROXY USER

4. A popup window asks if you want to **Manage Permissions for My Third Party**. Click **OK** on this popup to manage permissions for this person. *You must complete this step to create your third-party proxy user's account.*

a. If this popup does not appear, click **Actions** for this person on your **Friends and Family** list (scroll right to see this button), then select **Manage Permissions for Third Party**.

5. Review the lists of tasks available for a third-party user. **Click the checkbox for each task** you want this person to be able to do. Then click **OK**.

- Third-party users have access *only* to the information you select. Options include: make payment; view financial aid package; view account activity; view statement; view current classes; view grades; generate unofficial transcript. You can add/remove access at any time.

Make a Payment ☒

6. Review the **FERPA Release Authorization Waiver**. FERPA is a federal privacy law that protects your personal academic information.

a. In the **Purpose of Waiver** box, type the reason why you are sharing this information with the selected individual. For example, "I want my parent to pay my bill."

b. Check the **Confirm** checkbox, then click **Submit**.

Confirm * ☒

7. **This person will receive two automated emails with their username and temporary password, and a link to login as a proxy user.** When they log in, they will have access to the information you selected. Here are two help guides for proxy users:

- [How to view and access a student's information in Workday](#)
- [How to pay a bill on behalf of a student](#)



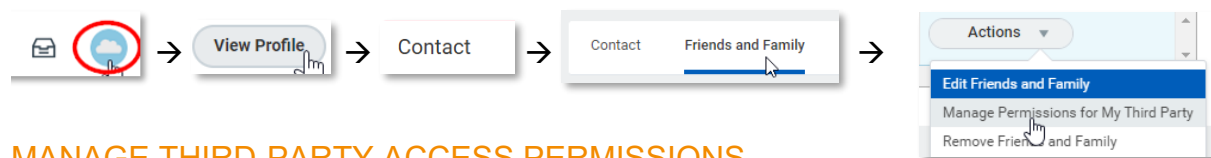
FOR PARENT/PROXIES WITH MULTIPLE STUDENTS AT CALVIN

8. **If another Calvin student, such as your sibling, already added a person as a third-party proxy user with the same name and email address**, you will receive an additional task in Workday to link the proxy accounts together. This task appears as a popup after you manage permissions and can also be found in your Workday Inbox.
- Click **Review** to review the access you granted this person.
 - Click **Approve** to complete the account linking.
 - This person can now use their existing Workday proxy username and password to access information for both students; the access available is set by each student. This person will *not* receive a new username or email confirmation.

Having trouble? View [parent/proxy troubleshooting guide](#) or contact helpdesk@calvin.edu

CHANGE OR REMOVE THIRD-PARTY ACCESS

You control third-party access to your information, and you can change or remove access at any time. From your **Student Profile**, go to **Contact** in the profile sidebar menu (click “More” to see it) then click **Friends and Family** at the top. Scroll right and click **Actions** for that person on your Friends & Family list, then **Manage Permissions for My Third Party**.



MANAGE THIRD-PARTY ACCESS PERMISSIONS

To **change** access for a person: click the **Actions** button for that person on your Friends & Family list (scroll right to find it), and select **Manage Permissions for Third Party**.

- Click **OK** in the popup window to confirm.
- Review the list of tasks available to third parties, and uncheck or check the **Allowed** boxes to make your changes. Then click **OK**.
- Review the FERPA waiver again, type your reason, confirm, and submit.

You can also access this task from *Workday Menu > Student > Student Center > Student Billing > Manage Third-Party Proxy Access*

EDIT FRIENDS AND FAMILY CONTACT INFORMATION

To **edit** information about a person, click the **Actions** button for that person on your Friends & Family list (scroll right to find it), and select **Edit Friends and Family**.

- IMPORTANT:** If you need to change the email address for an existing third-party proxy user, please contact helpdesk@calvin.edu.

REMOVE A PERSON FROM FRIENDS AND FAMILY

To **remove** a person entirely, go to your **Contacts** tab and click **Friends and Family**. Click the **Actions** button (scroll right to find it) and select **Remove Friends and Family**. Click **Confirm**, then **OK**. They will no longer be able to view any of your Workday information.