

Purpose: Manage third-party (also called “proxy”) access to allow parents, guardians, or others to view your financial information, pay your bill, and/or to 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 you can set different access for each.

QUICK STEPS

[Workday](#) > **Student Profile** > Contact sidebar tab > Friends and Family tab > Add > Enter details, including relationship type and mark as third-party user, and add email address under Contacts > Save > Friends and Family tab > Actions button on person > Manage Permissions for My Third Party > Choose allowed tasks > Confirm > Submit
(> Approve linking accounts if multiple students designate same proxy user.)

OVERVIEW

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

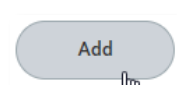
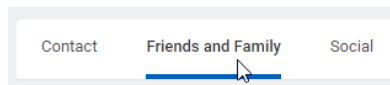
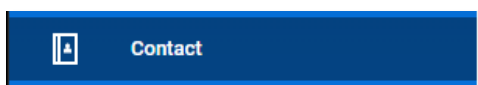
1. [Add to Friends and Family](#): Give access to your information in Workday to a parent, guardian, or others by adding them to “Friends and Family” in your Workday profile.
2. [Manage permissions](#): Decide what information you’ll provide access to (grades, billing, and/or financial aid), which is called “manage permissions” in Workday.
3. Those you provide third-party 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 a third-party user with the same email address, you will receive an additional Workday task to link the proxy accounts together. The third-party user must use their original proxy username and password to access authorized information about both students. (Workday will automatically send an additional proxy username when you manage permissions, but it will not work and should be ignored.)

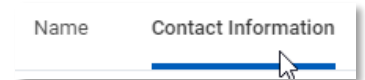
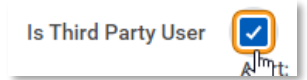
ADD THIRD-PARTY PROXY ACCESS

ADD PERSON TO YOUR FRIENDS AND FAMILY

1. In [Workday](#), go to your **student profile**.
 - a. Access your student profile by clicking your picture in the upper right corner of the Workday header, then click **View Profile**.
 - If you are also a Calvin employee, click your name under the **Student** header on your Worker profile overview to access your student profile.
2. Click the **Contact** sidebar tab and then **Friends and Family** tab at the top.
 - a. To add a new person, click **Add**.

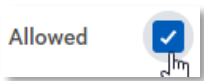
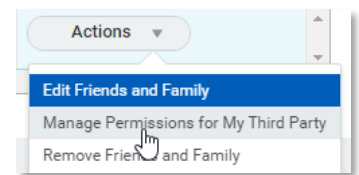


3. On the next screen, enter the name, relationship and contact information for your third party.
 - a. Enter their details. Not all fields are required. At minimum, you must include:
 - **Relationship Type:** choose *all* that apply; you can also make someone your emergency contact here.
 - **Is Third Party User:** you *must* check this box if you want this person to have proxy access
 - **Name:** country, first name, and last name are required
 - b. Click the **Contact Information** tab to add their contact information. At minimum, you must include an email address. This email address will be used to set up their third-party account.
 - c. Click **OK** and then **Done** to finish adding this person.
4. Return to the **Friends and Family** area of your **Contacts**.



MANAGE PERMISSIONS FOR YOUR THIRD-PARTY

5. Next to the person you wish to grant third-party access, click **Actions** and then **Manage Permissions for My Third Party**. Click **OK** in the popup window to confirm you wish to manage permissions for this person.
6. Review the lists of tasks available for a third-party user. **Check the Allowed checkbox for each task** you want this person to be able to do. Then click **OK**.



- Third-party users will have access *only* to the tasks you choose to allow. Tasks available include: make payment; view financial aid package; view account activity; view statement; view current classes; view grades; generate unofficial transcript.

7. Review the **FERPA Release Authorization Waiver**.
 - 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 mom to pay my bill."
 - b. Check the **Confirm** checkbox, then click **Submit**.
8. **Once confirmed, this person will receive an email with instructions to set up their proxy account.** They will then have access to the information you selected.

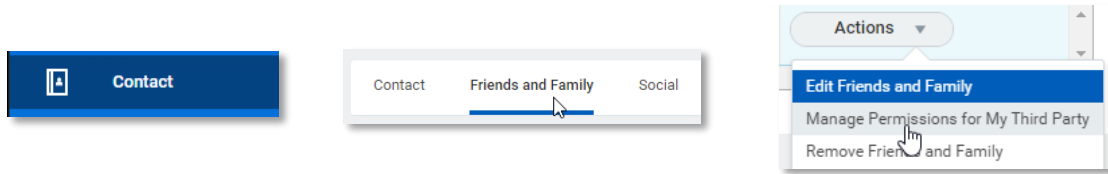


FOR PARENT/PROXIES WITH MULTIPLE STUDENTS AT CALVIN

9. *If another Calvin student already added a third-party user with the **same email address**, after you manage permissions for that third party, you will receive an additional task in Workday to link the proxy accounts together.*
 - a. Click **Review** to review the access you granted this person to *your* information.
 - b. Click **Approve** to link this user's access to your information to their existing proxy account. (If you do *not* approve, they will be unable to view your information.)
 - c. They will receive two emails with an additional proxy username and password. They should **delete** these emails and continue to log in using their original Workday proxy username and password. When the accounts are linked, proxy users can select which student's information they wish to view when selecting a task in Workday.

CHANGE OR REMOVE THIRD-PARTY ACCESS

You control third-party access to your information, and you can change or remove access and update contact information for your Friends and Family at any time from your student profile.



MANAGE THIRD-PARTY ACCESS PERMISSIONS

Go to your **Contacts** tab and click **Friends and Family**. In the row showing the person's name, click **Actions** and then **Manage Permissions for My Third Party**.

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

EDIT FRIENDS AND FAMILY CONTACT INFORMATION

To edit information about a person you already added, click the **Actions** button next to their name and select **Edit Friends and Family**. Make your changes; don't forget to click the **Contact Information** tab to add or change their email, address, or phone. Click **OK** to save.

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 next to their name and select **Remove Friends and Family**. Click **Confirm**, then **OK**.