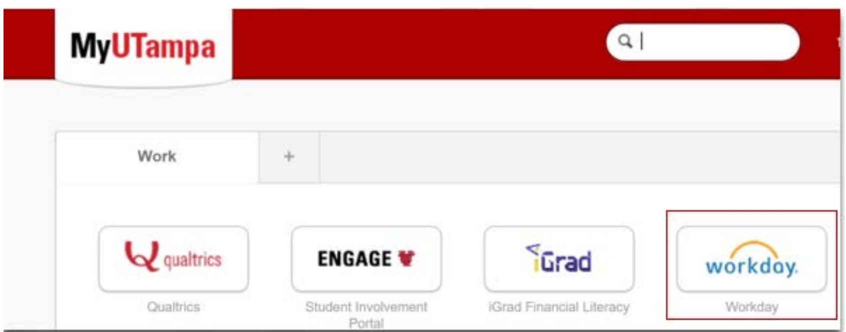
How do I set up third party access and manage permissions in Workday?

Question:

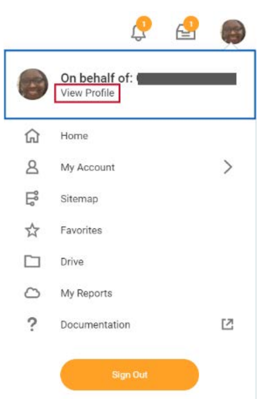
As a student, how do I setup third party access in Workday which authorizes someone to view financial aid, payments, etc.?

Answer:

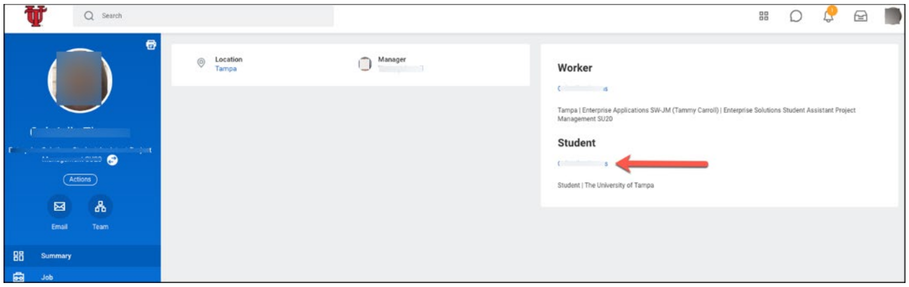
1. Login to [MyUTampa]() and select the **Workday** icon.



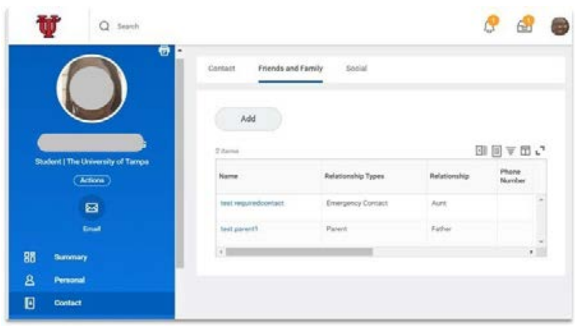
2. Click on **Photo** in the upper right-hand corner and then select ***View Profile**.



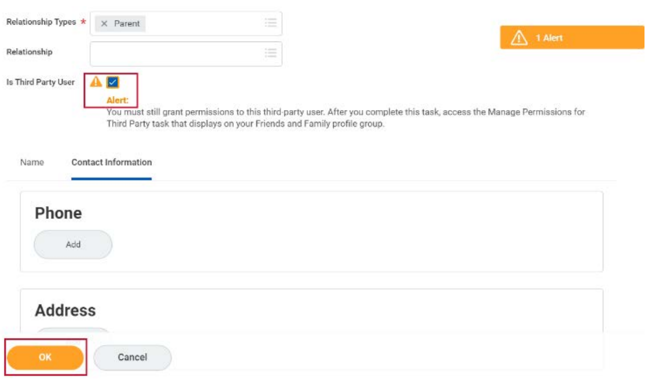
**Please note*: Students who are also Student Workers will have two profiles (Worker and Student). Please be sure to select the Student profile (not worker).



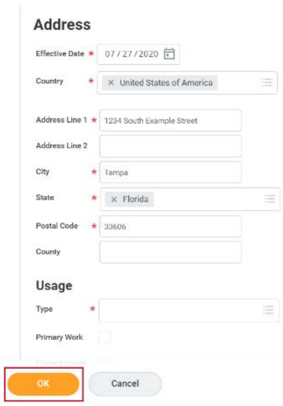
3. Select **Contact** in the left navigation bar, and then click **Friends and Family** tab. Click **Add** to create a new contact.



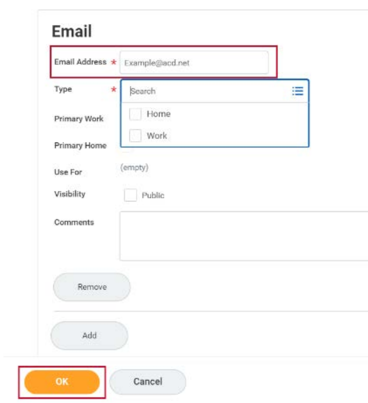
4. Indicate the **Relationship Type** and select the **Is Third Party User** box. Next, you will use both the Name and Contact Information tabs to add additional details.



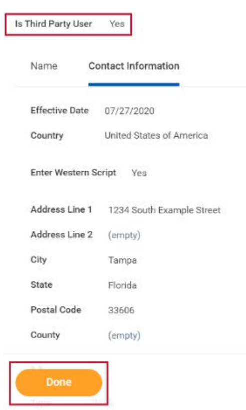
5. In the **Contact Information** area, go to the **Address** section, and click **Add**. Enter your contact's address information. Complete all mandatory fields denoted by the red asterisk including the usage type.



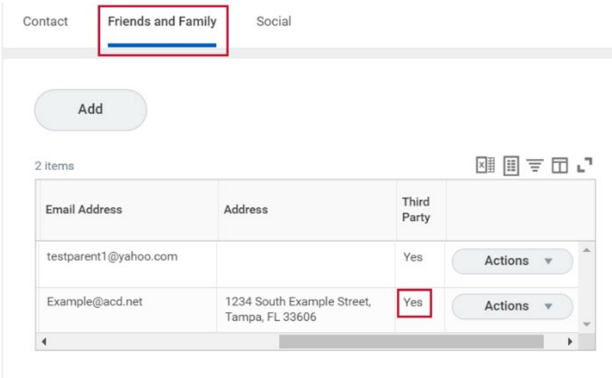
6. **An email must be added**. In the **Email** section, click **Add** and enter your contact's email information. When you are done, click **OK**.



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

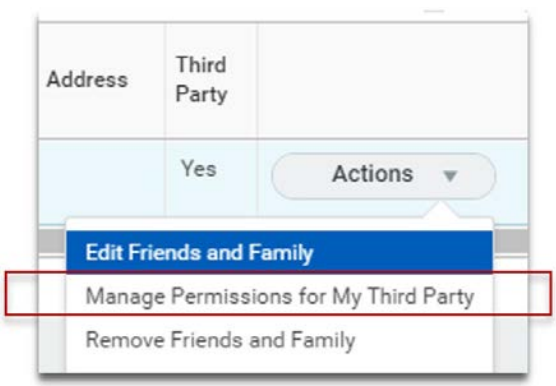


8. Return to the **Contacts** area, and click the **Friends and Family** tab, where you will use the **Actions** area to designate the specific type of third-party access.

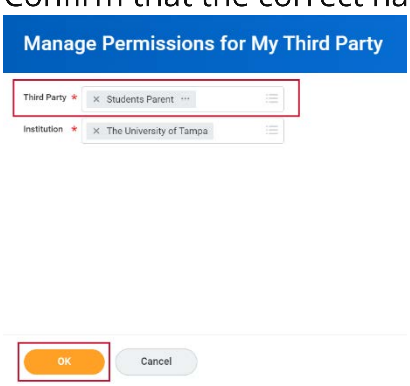


Tip: This is also an opportunity to confirm that the Third-Party column (shown below) denotes a Yes.

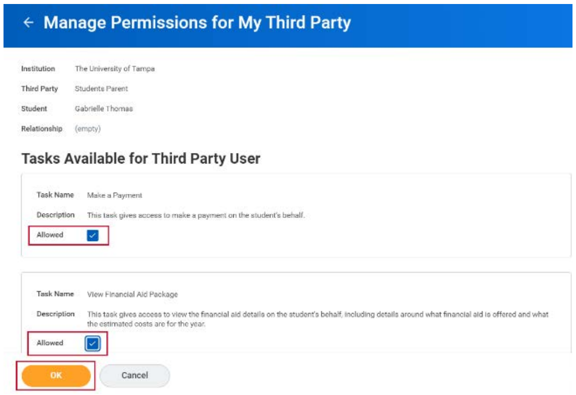
9. On the **Friends and Family** tab use the horizonal scrolling bar and move all the way to the right until you see the **Actions** button. Click the **Actions** button and in the drop-down menu, select **Manage Permissions for My Third Party**.



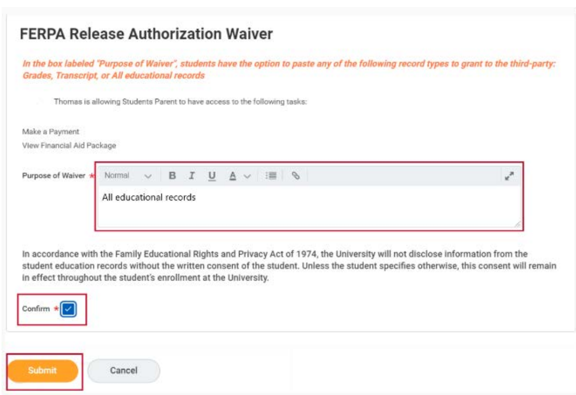
10. Confirm that the correct name appears in the **Third-Party** field and click **OK**.



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]