

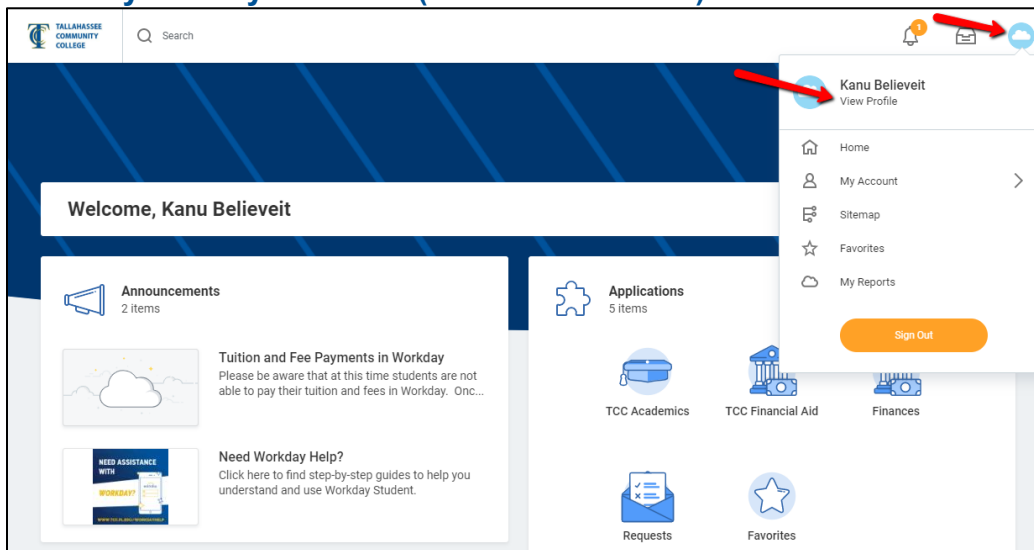


Providing Third-Party Access

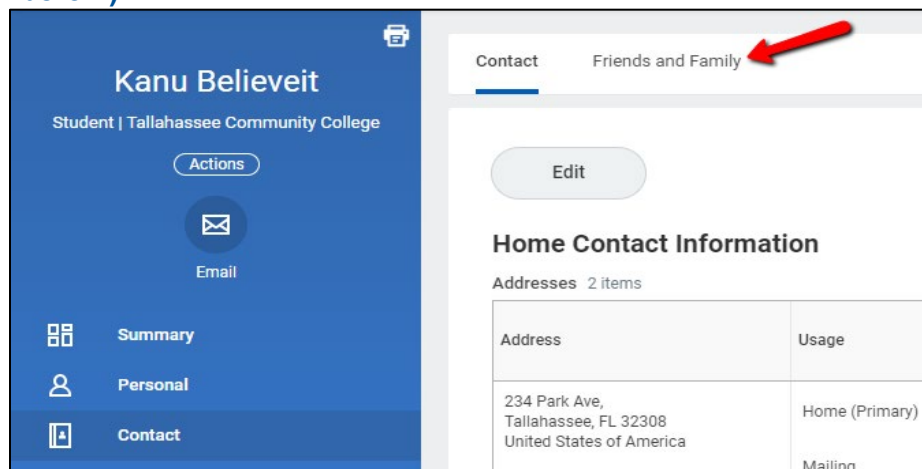
This process will allow you to give parents and/or guardians access to view your financial aid status, make payments, and/or view statements on your behalf.

After logging into Workday, follow the steps below to carry out the process.

On your homepage, click the cloud icon in the top-right corner and select “View Profile” directly under your name (see arrows below).

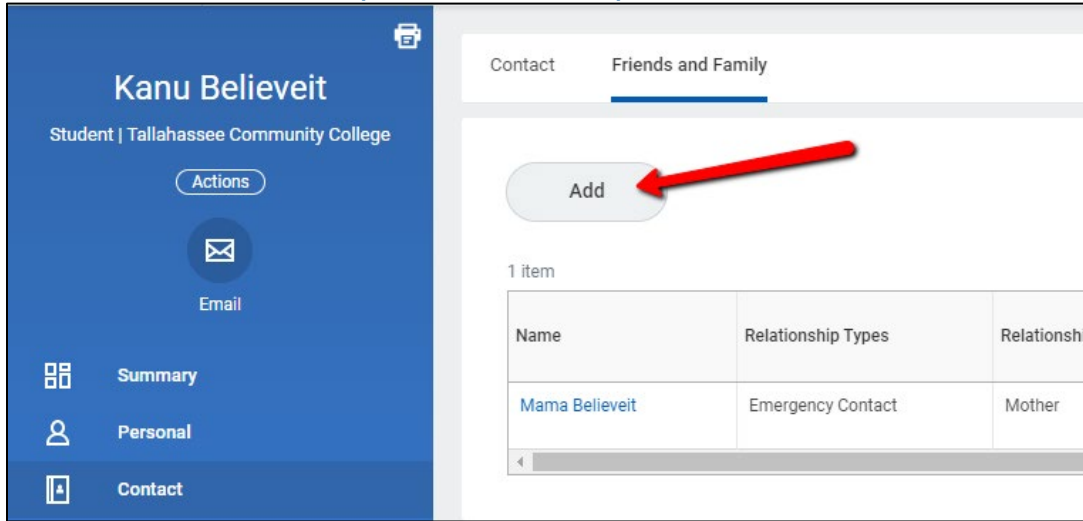


Click “Contact” in the left-hand pane, then select the “Friends and Family” tab (see arrow below).



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This will display any current emergency contact information. To add a third-party user, click the “Add” button (see arrow below).



Select a “Relationship Type” (required) and “Relationship” (optional), check the box next to “Is Third-Party User” (see arrow below), then click on “Contact Information” (see highlighted box below) and complete all fields marked with a red asterisk. Click “OK” at the bottom of the window when finished.

*(NOTE: You **must** enter an email address for the contact to receive third-party access.)*

The screenshot shows the 'Add My Friends and Family' form. The form is for Kanu Believeit and includes the following fields:

- Relationship Types * (dropdown menu with 'Emergency Contact' selected)
- Relationship (dropdown menu with 'Father' selected)
- Is Third Party User (checkbox checked, with a red arrow pointing to it)
- Name (dropdown menu with 'Contact Information' selected, highlighted with a red box and a red arrow)
- Country * (dropdown menu with 'United States of America' selected)
- Prefix (text input)
- First Name * (text input with 'Daddy')
- Middle Name (text input)
- Last Name * (text input with 'Believit')
- Suffix (text input)

An alert message is displayed below the 'Is Third Party User' checkbox:

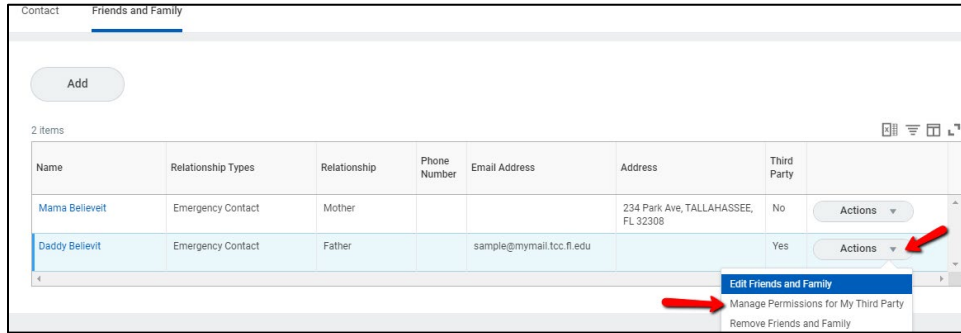
Alert:
You must still grant permissions to this third-party user. After you complete this task, access the Manage Permissions for Third Party task that displays on your Friends and Family profile group.

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This will take you back to the “Friends and Family” page, with the new contact added to your list.

To provide third-party access, you will need to click on the “Actions” dropdown next to the new contact’s name and select “Manage Permissions for My Third Party” (see arrows below).

(NOTE: This can only be done for contacts with “Yes” listed in the “Third Party” column.)



Verify that the “Third Party” and “Institution” information are correct, then click “OK.” On the next page, select all options to which you would like to grant this person access (see arrows below), then click “OK” at the bottom.

← Manage Permissions for My Third Party

Institution Tallahassee Community College
Third Party Daddy Believeit
Student Kanu Believeit
Relationship Father

Tasks Available for Third Party User

Task Name Make a Payment
Description This task gives access to make a payment on the student's behalf.
Allowed

Task Name View Financial Aid Package
Description This task gives access to view the financial aid details on the student's behalf, including details around what financial aid is offered and what the estimated costs are for the year.
Allowed

Task Name View Account Activity
Description This task gives access to view student account transactions, including charges, payments, financial aid, and refunds, that have been posted to the student account. Details around the Due Now amount and any available payment plans can also be seen.
Allowed

Task Name View Student Statement
Description This task gives access to view a student's statement on the student's behalf.
Allowed

OK Cancel

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Review the text on the next page, then type the **exact** name of the individual to whom you are granting access in the “Purpose of Waiver” box, check the box next to “Confirm” (see arrows below), and finally, click “Submit” at the bottom.

FERPA Release Authorization Waiver

Read the information outlined below. In the *Purpose of Waiver* field, please enter the name of the individual you are granting access to your account.

Kanu Believeit is allowing Daddy Believeit to have access to the following tasks:

- Make a Payment
- View Account Activity
- View Financial Aid Package
- View Student Statement

Purpose of Waiver *
Normal B I U A :list-item link

Daddy Believeit

Privacy Act:

The Privacy Act prohibits the release of information from your file to third parties without written consent. By confirming the name listed above, you are giving permission to TCC to release financial aid and/or student account information to them based on your specified preferences. This authorization may be canceled at any time by your written consent.

To provide authorization to release your student education record (transcripts, grade point average, credit hours, and academic standing) to a third party you will need to complete and submit a Student Consent for Release of Education Record Information (FERPA form) available from the Admissions and Records Office.

Confirm *

enter your comment

Submit
Cancel

You will receive a confirmation. Click the gold “Done” button to complete and return to your “Friends and Family” page. Those with third-party access will show with a “yes” in the column highlighted below. You can give different access to each person if necessary.

Contact							Friends and Family	
Name	Relationship Types	Relationship	Phone Number	Email Address	Address	Third Party	Actions	
Mama Believeit	Emergency Contact	Mother			234 Park Ave, TALLAHASSEE, FL 32308	No	Actions	
Daddy Believeit	Emergency Contact	Father		sample@mymail.tcc.fl.edu		Yes	Actions	

Be sure to notify the person(s) to whom you have given third-party access. They will need to check their email and follow the steps given to create their own Workday account. Once they have done this, they will be able to log in and access the areas you have authorized.

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