

Set Up Authorized Payer (Third-Party Access) for Student Account

This job aid demonstrates how a student may grant other people access to their student account. You determine to whom you would like to grant access and to what you are permitting them to access and/or do on your behalf. For example, you can enable a parent to view financial information and make payments. You can create and manage third-party access via the Friends and Family tab of the Contacts section of your Student Profile.

You may add new or edit current friends and family to grant them third-party access.



***Important:** Access to financial activity will be available in Workday early **July 2024**. Providing third-party permissions now will allow seamless access to view account activity and make payments. Any account activity prior to 7/1/2024 should still be viewed and paid via DEAC.

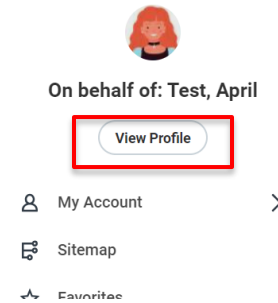
Set Up Third-Party Users

Add a New Authorized Payer

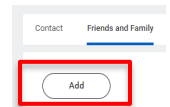
Complete the following steps to add someone who is not already listed on your account.

1. Log in to Workday.
2. In the top right corner, locate and click the **Profile** icon.

3. Click the **View Profile** button.



4. From the blue navigation pane on the left, click **Contact**.
5. On the right, click the **Friends and Family** tab. All current contact information is displayed.



6. To add a new friend or family member, click the **Add** button.
7. Click the prompt in the **Relationship Types** field to reveal the options. *You may select more than one Relationship Type if desired.

The options in the **Relationship** field (optional) are dependent upon which Relationship Type(s) you choose.

Add My Friends and Family

For	Test, April
Relationship Types *	<input type="text"/>
Relationship	<input type="text"/>

- The **Is Third Party User** checkbox must be checked to grant access to your account.

For Test, April

Relationship Types *

Relationship

Is Third Party User

Alert: You must still grant permissions to this third-party user.



Important: Upon checking **Is Third Party User**, you will receive an Alert informing you of the final step in granting access to your account - **Manage Permissions for My Third Party**.

- Enter the required * information in the **Name** fields below then click the **Contact Information** tab to continue.

Name

Country *

Prefix

First Name *

Middle Name

Last Name *

Suffix

- Click the **Add** button and provide all required information for each contact category – **Phone, Address, Email** (third-party users will receive an email concerning account access).

Name

Phone

Address

Email

- Click **OK**.

Manage Permissions for My Third Party

To manage permissions of third-party users:

- Click the **Actions** button on the far right of the third-party user and select **Manage Permissions for My Third Party**.

	Third Party	
	Yes	Actions ▾
		<ul style="list-style-type: none"> Edit Friends and Family Manage Permissions for My Third Party Remove Friends and Family

2. Ensure you've selected the desired Third Party and click **OK**.

Manage Permissions for My Third Party

Third Party *

Institution *

3. On the **Manage Permissions for My Third Party** page in the **Tasks Available for Third-Party User** section, click the **Allowed** checkbox for the permissions you want to grant.



Note: Some tasks when selected will display additional permissions that may be allowed.

Task Name View Student Statement

Description This task gives access to view a student's statement without courses on the student's behalf.

Allowed

Description This option displays courses that the student is charged for on the student statement.

Allowed



Important: Please read the descriptions for each task to ensure you are granting the desired permissions for each third-party user.

Third Party Test, Mama
 Student Test, April
 Relationship Mother

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 Account Activity

Description This task gives access to view student account transactions, including charges, pay financial aid, and refunds, that have been posted to the student account. Details arou Due Now amount and any available payment plans can also be seen.

Allowed

Task Name	Description	Additional Permission
Make a Payment	Allows the third party to make payments on behalf of the student	Allow third party to receive past due balance notifications
View Account Activity	Allows the third party to view account transactions (charges, payments, financial aid, refunds) and Due Now details and payment plans	
View Student Statement	Allows the third party to access the student's statement without course information	Allow third party to see the course information on the statement

View Current Classes	Allows the third party to access the student's currently registered courses	
View Student Grades	Allows the third party to access the student's grades	
Generate Unofficial Transcript	Allows the third party to generate an unofficial transcript	

- Click **OK** after selecting your desired tasks.
- Review the **Privacy Release Authorization Waiver** to ensure you've selected the desired tasks. Enter a comment in the **Purpose of Waiver** field.

Purpose of Waiver *

Normal B *I* U A ☰ 🔗

I want my mother to be an authorized payer on my student account.

By granting proxy access the student is giving Wake Forest permission to share the selected information with that individual. This permission is necessary to comply with the Family Educational Rights and Privacy Act (FERPA).

Confirm *

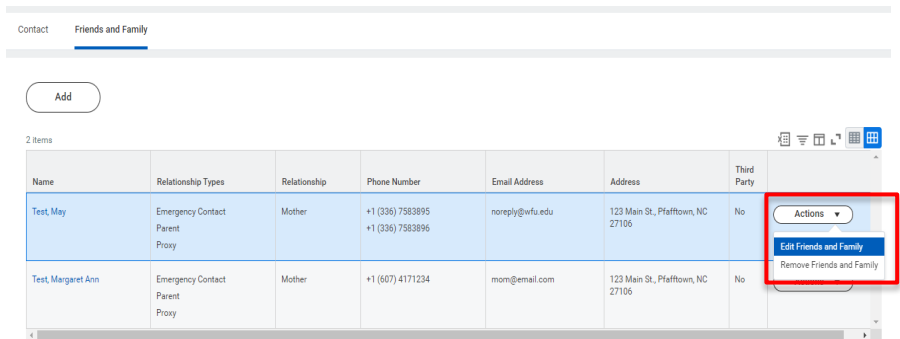
- Click the **Confirm** checkbox.
- Click **Submit**.

Edit Existing Friends and Family

If you wish to grant access to an existing friend or family member (who was not previously set up as an authorized payer), you must edit their information.

Complete the following steps to edit **Friends and Family** information.

- Complete steps 1-4, as outlined in the first section of this job aid.
- Locate the friend or family member whose details need to be edited.
- On the far right, click the **Actions** drop-down menu, then select **Edit Friends and Family**.



- Check the **Is Third Party User** checkbox.

Is Third Party User Alert: You i

- Click **OK**.
- Click **Done**.
- Complete the final steps to grant access to this friend or family member - **Manage Permissions for My Third Party**.