

# Managing Friends and Family Contact Information & Third Party Permissions (Students)

Students can manage their friends and family contact information and grant Third Party permissions to their contacts in Workday.

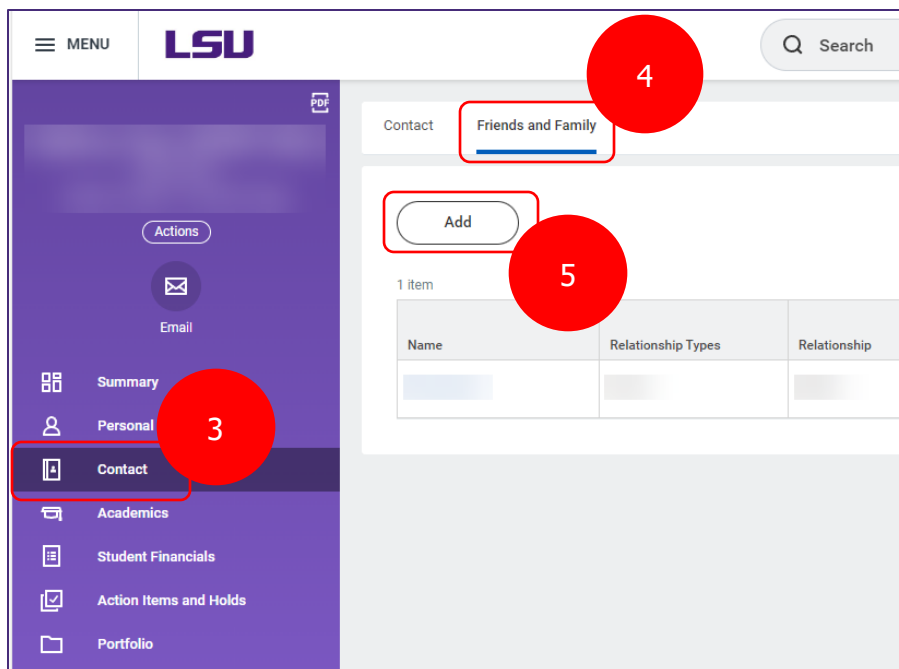
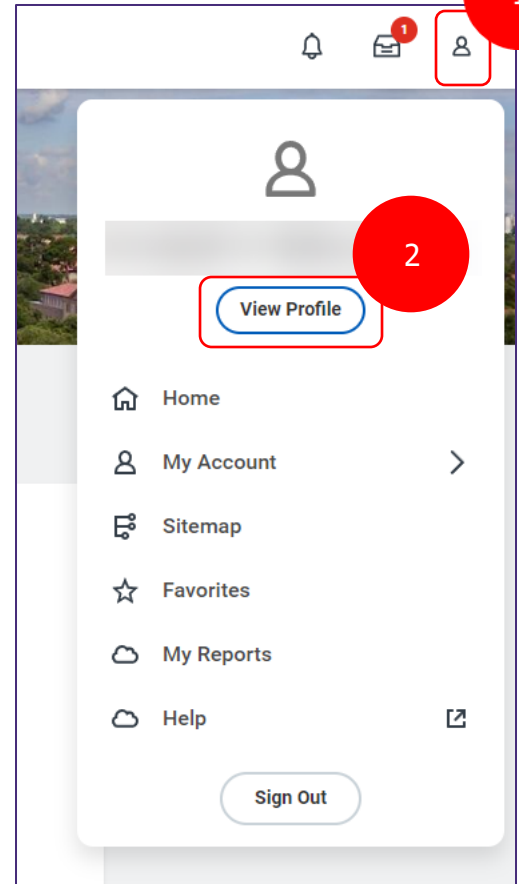
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# Adding & Editing Friends and Family Contacts

Students can add and edit third party contact information in Workday.

1. On the Workday home page, click the **Profile** icon.
2. Click **View Profile**.
3. Click **Contact**.
4. Once in the **Contact** section, click **Friends and Family**.
5. To add contacts, click **Add** on the top of the **Friends and Family** section.



# Adding & Editing Friends and Family Contact (cont.)

6. Select the **Relationship Types** and make the appropriate selections from the **drop down**.
7. Select the **Relationship** and specify the relation from **drop down**.
8. Mark **Is Third Party User** checkbox to assign contact as a Third Party User. Third Party Users may be granted the permission to view or complete tasks on a student's behalf.

The screenshot shows the 'Add My Friends and Family' form. It has a purple header with the title. Below the header, there's a 'For' field with a dropdown menu. The form contains several fields: 'Relationship Types' (a dropdown menu with a red circle 6), 'Relationship' (a dropdown menu with a red circle 7), 'Is Third Party User' (a checkbox with a red circle 8), 'Preferred Languages' (a dropdown menu), and 'Comments' (a text area). The 'Relationship Types' and 'Relationship' fields are highlighted with red boxes.

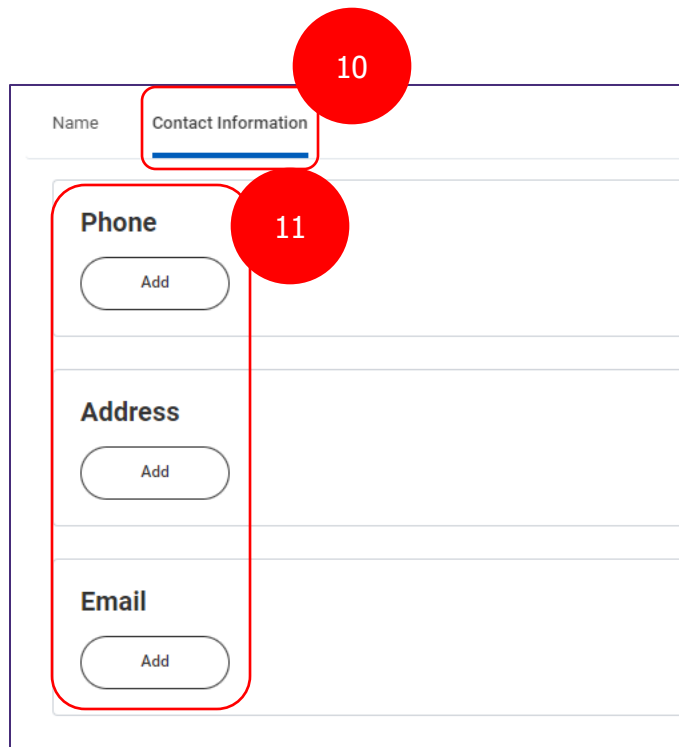
9. Complete Contact Name details.

The screenshot shows the 'Contact Information' form. It has a 'Name' tab selected. The form contains several fields: 'Country' (a dropdown menu with 'United States of America' selected), 'Prefix' (a dropdown menu), 'First Name' (a text field), 'Middle Name' (a text field), 'Last Name' (a text field), and 'Suffix' (a dropdown menu). The 'First Name', 'Middle Name', and 'Last Name' fields are highlighted with a red box and a red circle 9.

# Adding & Editing Friends and Family Contact (cont.)

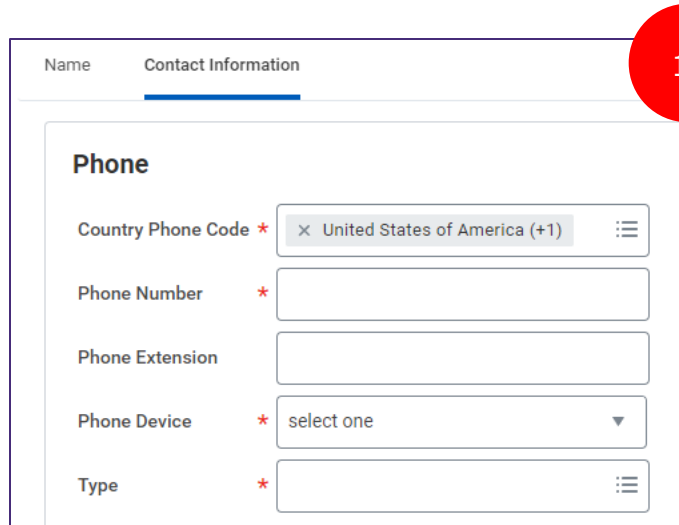
10. Click **Contact Information**.

11. Click **Add** for each type of contact modality.



The screenshot shows the 'Contact Information' tab selected. Below the tab, there are three sections: 'Phone', 'Address', and 'Email'. Each section has an 'Add' button. Red circles with the number 10 point to the 'Contact Information' tab, and red circles with the number 11 point to the 'Add' buttons in the 'Phone', 'Address', and 'Email' sections.

12. Under **Phone**, enter Phone Number, Phone Device, and Type.



The screenshot shows the 'Phone' section expanded. It contains the following fields: 'Country Phone Code' (with a dropdown menu showing 'United States of America (+1)'), 'Phone Number', 'Phone Extension', 'Phone Device' (with a dropdown menu showing 'select one'), and 'Type'. Each field has a red asterisk indicating it is required. A red circle with the number 12 points to the 'Phone' section header.

# Adding & Editing Friends and Family Contact (cont.)

13. Under **Address**, enter the Effective Date, Address, and Type.
14. Under **Email**, enter Email Address and Type (required for third party permissions).

**Email**

Email Address \*

Type \*

**Address**

Effective Date \*

Country \*

Address Line 1 \*

Address Line 2

City \*

State \*

Postal Code \*

County

**Usage**

Type \*

15. Click **OK** to complete the form.

16. Click **Done** to exit task.



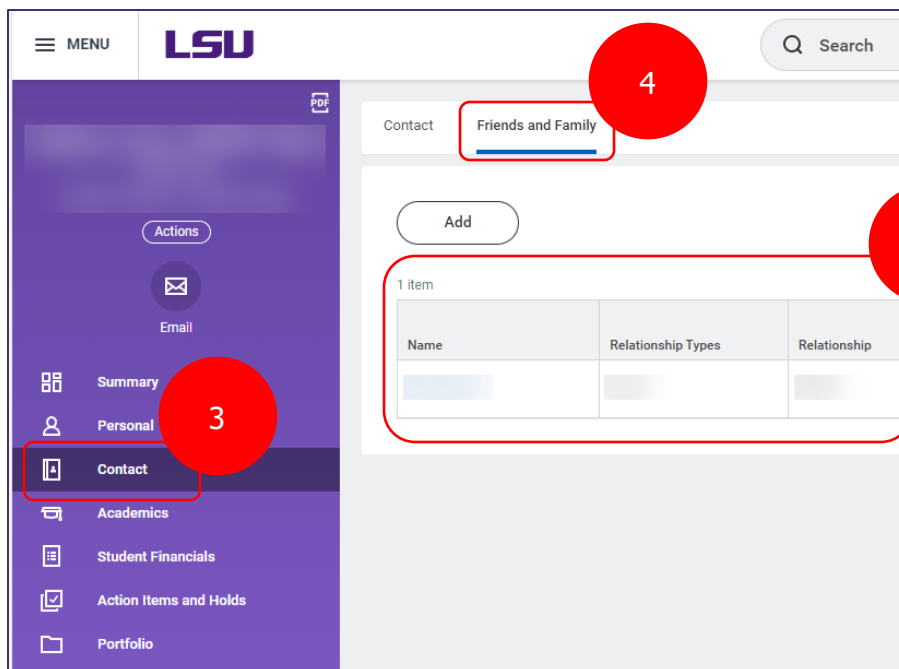
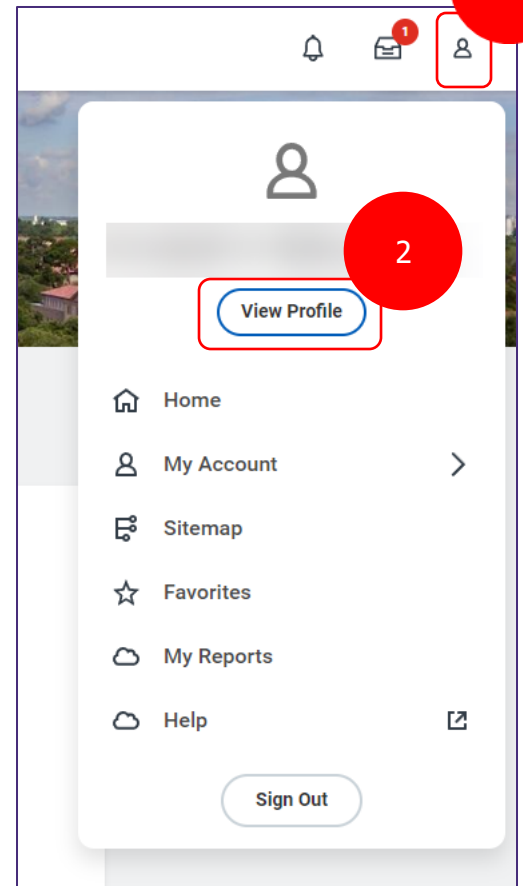
## Helpful Hint:

To Delegate Third Party Permissions to a contact, you must enter an email address. It is important to enter a phone number & address as well, especially if the person is your emergency contact.

# Managing Third Party Permissions

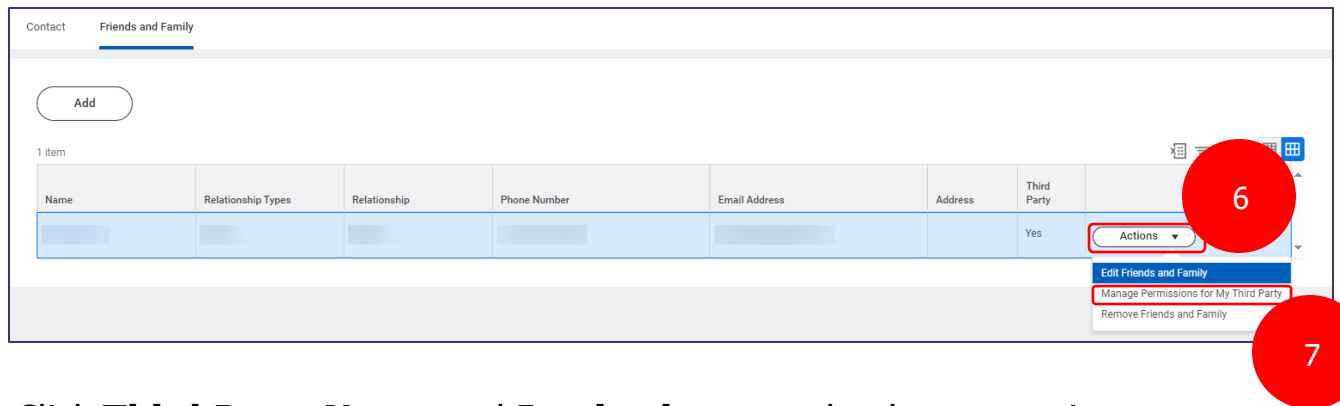
Students can manage third party access permissions in Workday.

1. On the Workday home page, click the **Profile** icon.
2. Click **View Profile**.
3. Click **Contact**.
4. Once in the **Contact** section, click **Friends and Family**.
5. View Contacts in the **Friends and Family** tab.

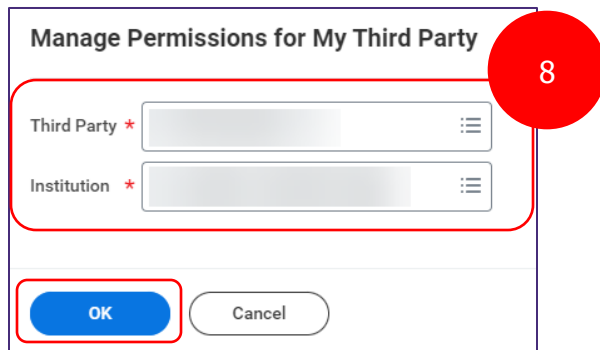


# Managing Third Party Permissions (cont.)

6. Click **Actions** for relevant contact.
7. Select **Manage Permissions for My Third Party**.



8. Click **Third Party Name** and **Institution** to make the appropriate selections from the **drop down**, then click **OK**.



9. Review Permission Types and Descriptions:
  - Make a Payment, View Financial Aid Package, View Account Activity, View Student Statement, View Current Classes, View Student Grades, and Generate Unofficial Transcript.
10. Mark the desired **Allowed** Checkbox(es) for any or all these Permission Types.
11. Click **OK**.

# Managing Third Party Permissions (cont.)

12. Review the **Privacy Release Authorization Waiver & Third-Party Authorization**.
13. Enter the **Purpose of Waiver** description. (Sample statement: "I authorize this request")
14. Click the **Confirm** checkbox.
15. Click **Submit**.

The screenshot shows the 'Manage Permissions for My Third Party' interface. A red circle with the number 12 points to the 'Privacy Release Authorization Waiver' section header. Below it, a text box contains a summary of access. Another red circle with the number 13 points to the 'Purpose of Waiver' text area, which includes a rich text editor toolbar. A third red circle with the number 14 points to the 'Confirm' checkbox. A fourth red circle with the number 15 points to the 'Submit' button at the bottom of the form.



## Helpful Hint:

Delegating Third-Party Permissions is a two-step process. First, you must assign contacts as Third-Party User, then you can manage their permissions. This allows the Third-Party User to perform actions on your behalf.



# Managing Third Party Permissions (cont.)

- *How will my Third-Party contact login to Workday?*
  - The Third-Party user will receive two emails from Workday when granted Third-Party access by their student. The first email includes the login link and login details, while the second email contains the password.
  - Using the provided link and login credentials, they will enter a version of the Workday homepage, offering access to only specific functions they've been authorized to use, such as viewing student grades.
  - Contact the **ITS Service Desk** (servicedesk@lsu.edu) for assistance in resolving any technical issues related to Third-Party access.