

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 can set different access for each. Each user needs a different email address.
 - **Having trouble? View the [parent/proxy troubleshooting guide](#).**

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

OVERVIEW

There are three steps to the process of setting up your parent or another third-party 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 give 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 the same third-party user with matching name and email address](#), you will receive an additional Workday task to link the proxy accounts together. That user can use the same proxy username and password to access authorized information about multiple students. **To create linked proxy accounts, the third party’s name and contact information must match exactly with the information the other student provided.***

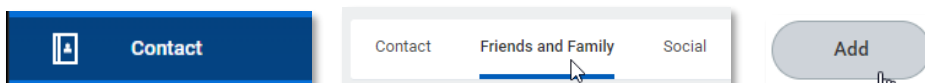
ADD THIRD-PARTY PROXY ACCESS

ADD PERSON TO YOUR FRIENDS AND FAMILY

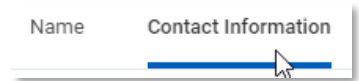
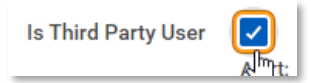
1. In [Workday](#), go to your **student profile**.
 - a. Access your student profile by clicking your picture in the upper right corner of the Workday header, then click **View Profile**.
 - If you are also a Calvin employee, click your name under the **Student** header on your Worker profile overview to switch to 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**.

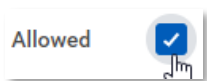
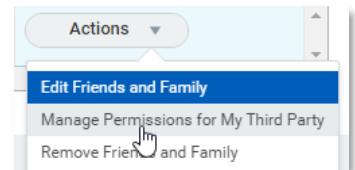


3. On the next screen, enter the name, relationship and contact information for your third party.
 - a. Enter their details. Not all fields are required. At minimum, you must include:
 - **Relationship Type:** choose all that apply
 - **Is Third Party User:** you must check this box if you want this person to have proxy access
 - **Name:** country, first name, and last name are required. If another student, such as your sibling, is using the same third-party proxy, you should both enter their name in exactly the same way, including title, middle name, etc.
 - 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.
 - **IMPORTANT:** Each proxy user must have their own email address! If you are adding multiple people, you must use a different address for each person.
 - If another student, like a sibling, has already added this person, you must match the contact details they already submitted. See [next page for additional instructions for when a person has already been added by someone else](#).
 - c. Click **OK** and then **Done** to finish adding this person.
4. Return to the **Friends and Family** area of your **Contacts**.



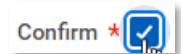
MANAGE PERMISSIONS FOR YOUR THIRD-PARTY

5. Next to the person you wish to give 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 two emails with their username, temporary password, and link to access their proxy account.** When they log in, they will have access to the information you selected.
 - a. Just in case they need it, here are a couple of extra help resources for parents:
 - [How to view and access a student's information in Workday](#)
 - [How to pay a bill for a student](#)

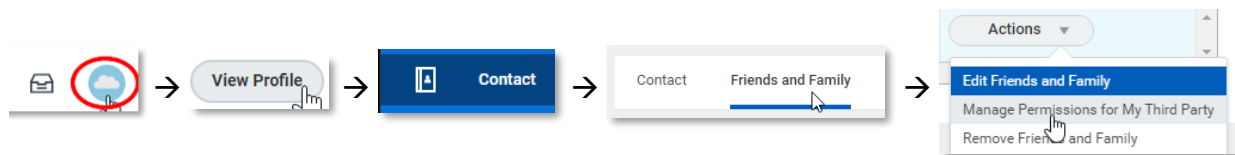


FOR PARENT/PROXIES WITH MULTIPLE STUDENTS AT CALVIN

9. If another Calvin student, such as your sibling, already added a third-party proxy user with the **same name and 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 complete the account linking.
 - c. This third-party user can now use the same Workday username and password to access information for both students; the access available is set by each student for their own.

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.



HELPFUL HINT: Friends and Family is on your **student profile**. If you are also a student worker, Workday will default to your **worker profile**, and “Friends and Family” will be missing from your Contacts tab. You must switch views to access Friends and Family. Click your name under the **Student** header on your Worker profile overview to switch to your student profile.

MANAGE THIRD-PARTY ACCESS PERMISSIONS

To **change access** for a person you already added: click the **Actions** button next to their name and select **Manage Permissions for My Third Party**.

- a. Click **OK** in the popup window to confirm.
- b. Review the list of tasks available to third parties, and uncheck or check the **Allowed** boxes to make your changes. Then click **OK**.
- c. 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**.