

Purpose: Manage third-party (also called “proxy”) access to allow parents, guardians, or others to view and pay your bill, view your financial aid, and/or 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](#) > Profile picture > **View 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:

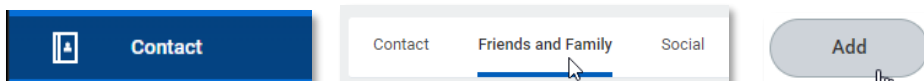
1. **[Add to Friends and Family](#)**: Give access to some of your information in Workday to a parent/guardian or others by adding them to your Workday “Friends and Family.”
2. **[Manage permissions](#)**: Decide what access you want them to have: bills, make payments, view financial aid, view course schedule and/or view grades. This is called “manage permissions” in Workday.
3. The person 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 person as a proxy user, you will receive an additional Workday task to link the proxy accounts together. The proxy user will 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**. See [below](#) for more information.*

ADD THIRD-PARTY PROXY ACCESS:

ADD PERSON TO YOUR FRIENDS AND FAMILY

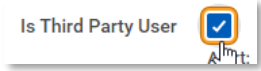
1. In [Workday](#), go to your **student profile** by clicking your picture in the upper right corner of the Workday header, then click **View Profile**.
→ If you are also a Calvin employee, you may see your *worker* profile first. Click your name under the **Student** header on your profile overview to switch views.
2. Click the **Contact** sidebar tab and then **Friends and Family** tab at the top.
 - a. To add a new person, click **Add**.



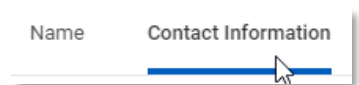
3. On the next screen, enter information about the person you want to add as a proxy user.

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 **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.



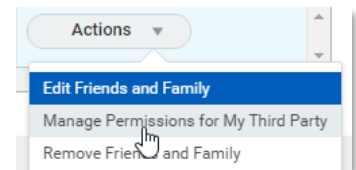
- **IMPORTANT:** Each proxy user must have their own email address! If you are adding multiple people, you must use a different address for each person.
- If your parent/proxy user is a Calvin employee, please use a personal email address instead of their Calvin work account.
- If another student, like 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.

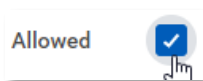
4. Return to the **Friends and Family** area of your **Contacts**.

MANAGE PERMISSIONS FOR YOUR THIRD-PARTY PROXY USER

5. On the list of Friends and Family, click **Actions** on that person, and select **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**.

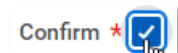


- Third-party users will have access *only* to the tasks you choose to allow. Tasks available include: make payment; view financial aid package; view account activity; view statement; view current classes; view grades; generate unofficial transcript.

7. Review the **FERPA Release Authorization Waiver**. FERPA is a federal privacy law that protects your personal academic information.

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. **This person will receive two automated emails with their username and temporary password, and a link to login as a proxy user.** When they log in, they will have access to the information you selected. Here are two help guides for proxy users:

- [How to view and access a student's information in Workday](#)
- [How to pay a bill on behalf of a student](#)

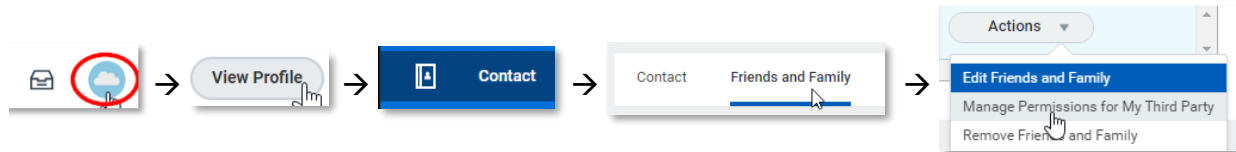
FOR PARENT/PROXIES WITH MULTIPLE STUDENTS AT CALVIN

9. If another Calvin student, such as your sibling, already added a person as a third-party proxy user with the **same name and email address**, you will receive an additional task in Workday to link the proxy accounts together. This task appears as a popup after you manage permissions and can also be found in your Workday Inbox.
 - a. Click **Review** to review the access you granted this person.
 - b. Click **Approve** to complete the account linking.
 - c. This third-party proxy user can now use the same Workday username and password to access information for both students; the access available is set by each student. This person will *not* receive a new username or email confirmation.

Having trouble? View [parent/proxy troubleshooting guide](#) or contact helpdesk@calvin.edu

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 may 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**.