

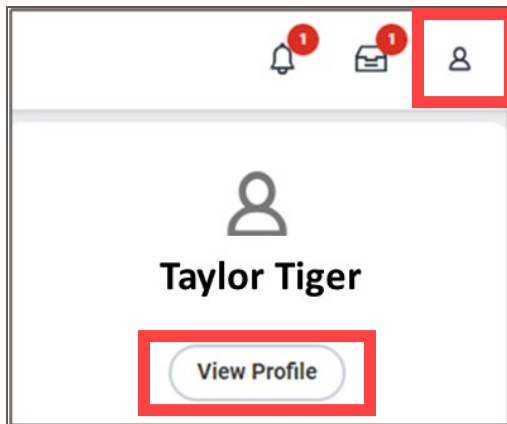
## GRANTING THIRD-PARTY PERMISSIONS

### Summary

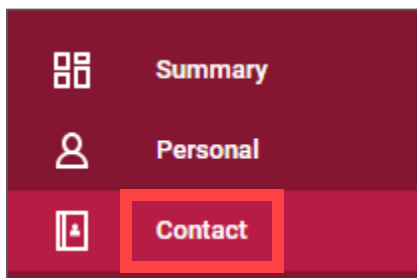
This guide will show you how to give third-party access to your contacts. Third-party access grants permission to individuals to view defined parts of your education record. This is how CU manages FERPA release authorization in Workday.

### Create a Third-Party User

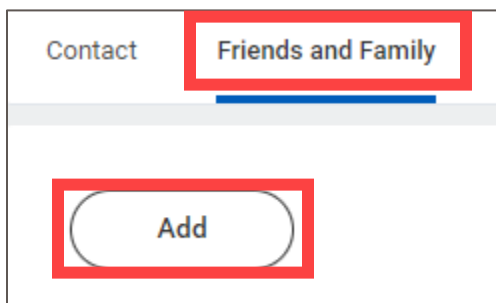
1. From the homepage, navigate to your **profile** by clicking the person icon and then clicking **View Profile**.



2. From the sidebar menu, select the **Contact** tab.



3. Select **Friends and Family**. If the person you wish to give third-party access to is not currently listed as a contact, click **Add**.



Here you will be able to define the relationship and provide contact information for third parties and indicate the individual as a third-party user.

### Add My Friends and Family

For **Taylor Tiger** ! 1 Alert

Relationship Types \*

Relationship

Is Third Party User  To name a third-party user, you **must** select the **Is Third Party User** box.

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.

Preferred Languages

Comments

---

Name Contact Information To create a third-party user, you will need to complete **both** the **Name** and **Contact Information** sections.

Country \*

Prefix

First Name \*

Middle Name

Last Name \*

Suffix

**NOTE** the Alert that displays when you select the **Is Third Party User** box *and* the accompanying message.



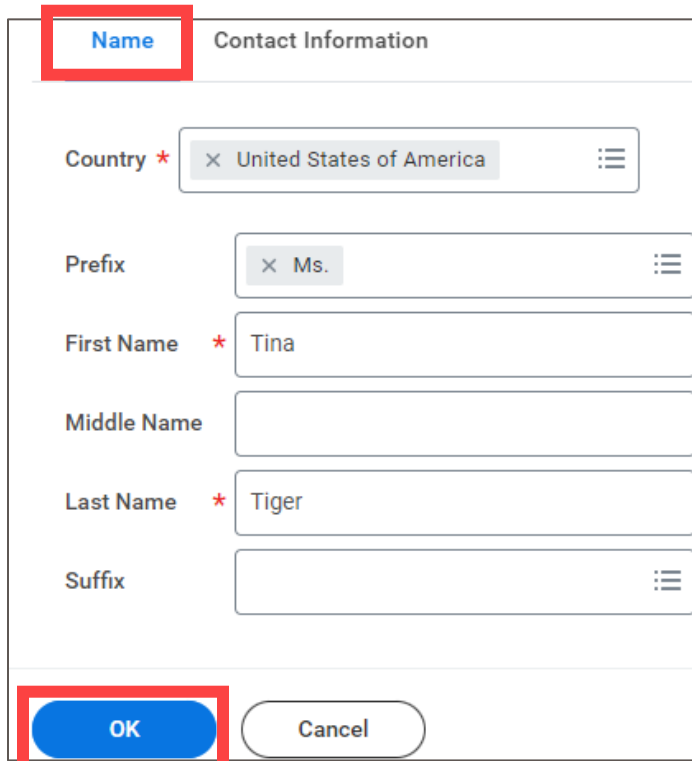
**Alert**

1. **Is Third Party User**

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.

The **Alert** notifies you that there will be an additional task to complete called **Manage Permissions for Third Party**. This is detailed in the **Manage Third-Party Permissions** section below.

4. Enter required information for the **Name** section and click **OK** when finished.



The image shows a 'Contact Information' form with a 'Name' section highlighted by a red box. The form includes the following fields:

- Country \***: A dropdown menu with 'United States of America' selected.
- Prefix**: A dropdown menu with 'Ms.' selected.
- First Name \***: A text input field containing 'Tina'.
- Middle Name**: An empty text input field.
- Last Name \***: A text input field containing 'Tiger'.
- Suffix**: A dropdown menu.

At the bottom of the form, there are two buttons: 'OK' (highlighted with a red box) and 'Cancel'.

- 5. Enter required information for the **Contact Information** section and click **OK** when finished.

*As noted above, emergency contacts require at least one form of contact information to be entered (phone, address, or email).*

Name **Contact Information**

**Phone**

Country Phone Code \*

Phone Number \*

Phone Extension

Phone Device \*

Type \*

Primary Work

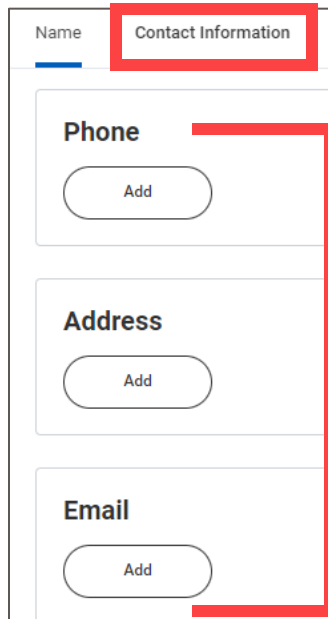
Primary Home

Use For

Visibility  Public

Comments

You can add multiple phone numbers, addresses, or emails for each emergency contact. If you choose to do so, you will need to mark one as **primary**.



Name **Contact Information**

**Phone**  
Add

**Address**  
Add

**Email**  
Add

### IMPORTANT NOTE:

Under **Contact Information**, there are options to add phone number, address, and email. Depending upon the **Relationship Type** you select in **Step #3** of this tutorial, different contact information may be required.

- To add an existing contact as a third-party user, select **Friends and Family** and then click the **Actions** button on the row of the contact you wish to edit and then select **Edit Friends and Family**.

Contact **Friends and Family**

Add

1 item

Name	Relationship Types	Relationship	Phone Number
John Tiger	Emergency Contact	Father	+1 (270) 5551234

Actions ▾

**Edit Friends and Family**

Remove Friends and Family

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

Is Third Party User

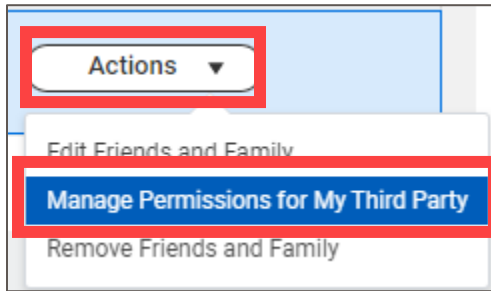
NOTE: Here you can also edit the name, contact, information, and relationship type for the third-party user. When you are finished updating and making edits, click the **OK** button.

**OK**

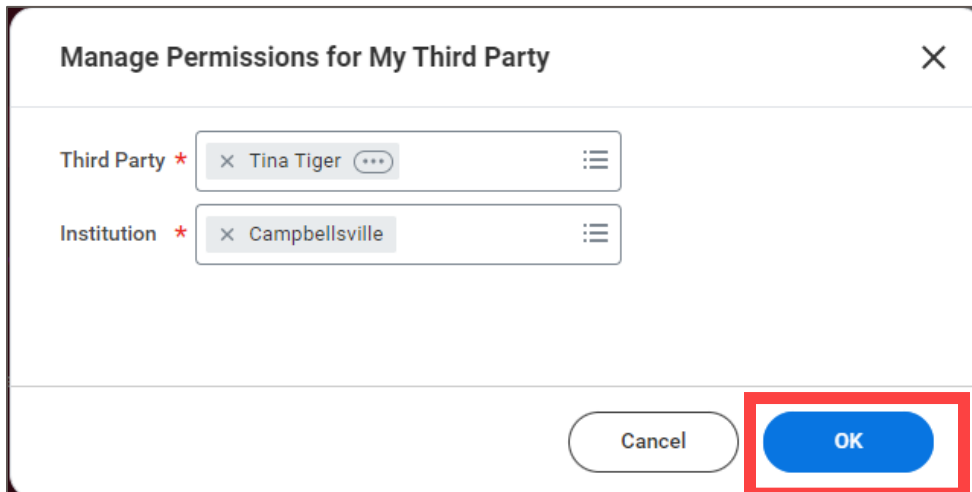
## Manage Third-Party Permissions

Now that a third-party user has been created in your **Friends and Family** contacts, you will need to manage the third-party permissions for that user.

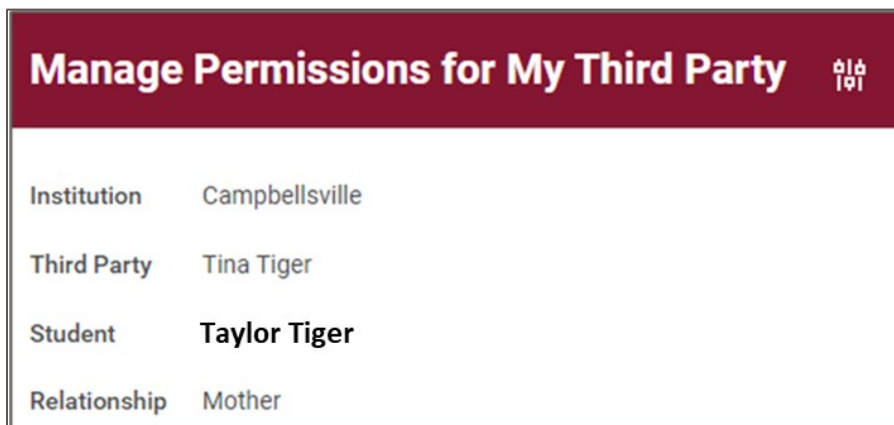
1. From the **Friends and Family** tab, then click the **Actions** button on the row of the contact you want to manage permissions for and then select **Manage Permissions for My Third Party**.



2. Ensure the correct user is selected in the **Third-Party** field. The **Institution** field should say **Campbellsville**.
3. Click **OK**.



You will be directed to the **Manage Permissions for my Third-Party** page.



On this page you will be able to indicate which tasks you would like your designated third-party user to have access to.

Tasks available for third-party users include:

- Make a Payment
  - *This task gives access to make a payment on the student's behalf. When allowed, you may also grant third-party users the ability to receive proactive past due balance notifications.*
- View Financial Aid Package
  - *This task gives access to view the financial aid information on the student's behalf, including details around what financial aid is offered and what the estimated costs are for the year.*
- View Account Activity
  - *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.*
- View Student Statement
  - *This task gives access to view a student's statement on the student's behalf. Note, this statement will not include courses. When allowed, you may also grant third-party users the ability to view courses that you are being charged for on your student statement.*
- View Current Classes
  - *This task gives access to the student's currently registered courses.*
- View Student Grades
  - *This task gives access to view the student's grades.*
- Generate Unofficial Transcript
  - *This task gives access to generate the student's **unofficial** transcript.*

Each task has an **Allowed** checkbox for you to indicate whether or not you want to grant access for that specific task to your third-party user.

Allowed



4. For this tutorial, we will allow access for the following tasks:

a. **Make a Payment**

Task Name	Make a Payment
Description	This task gives access to make a payment on the student's behalf.
Allowed	<input checked="" type="checkbox"/>
Description	This option allows third parties to receive proactive past due balance notifications.
Allowed	<input checked="" type="checkbox"/>

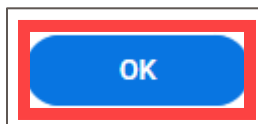
b. **View Current Classes**

Task Name	View Current Classes
Description	This task gives access to the student's currently registered courses.
Allowed	<input checked="" type="checkbox"/>

c. **View Student Grades**

Task Name	View Student Grades
Description	This task gives access to the student's grades.
Allowed	<input checked="" type="checkbox"/>

When you are done selecting each task that you are granting your third-party access to, click **OK**.



- 5. To complete this process, you will be required to confirm the **Privacy Release Authorization Waiver** in accordance with the requirements of Family Educational Rights and Privacy Act (FERPA).
  - a. You must enter a response in the **Purpose of Waiver** dialogue box. Explain why you are granting access to the listed tasks for the third-party user.
  - b. Select the **Confirm** box once you have reviewed the tasks and completed the **Purpose of Waiver**.

- 6. When you are finished, click **Submit**.

