

THIRD-PARTY ACCESS

Summary

This guide will help third-party users access Workday and introduce them to general site navigation as well as viewing accessible information about academics and student finances.

Accessing and Navigating Workday as a Third-Party

When a student identifies you as a third-party, they are granting you access to defined parts of their official academic record, which *may* include things like course schedules, grades, financial aid, and student financial account. Your access to the student's academic record is dependent upon the permissions the student has selected for you.

1. When you are named a third-party in Workday, you will receive an email with a link to set up your third-party account. **Click on the link and follow instructions to set up and/or verify your username and password.**

Once you are logged in, you will see a toolbar with various icons. The **Menu** will bring up a list of apps available to you as a third-party. The **Campbellsville University** logo can be used to return to the homepage. In the middle is a search bar where you can search for tasks or information. On the right-hand side there are three icons. The **bell** icon is for identifying when you have received notifications. The **file tray** icon alerts you to tasks that you need to complete. The **person** icon is for accessing information about your account and managing account information.



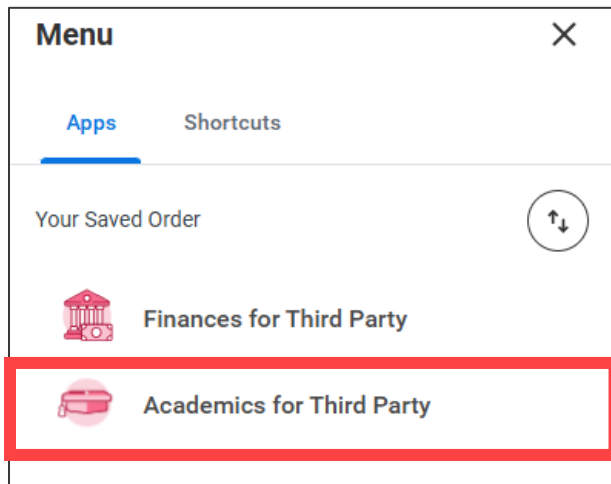
Accessing Student Academics Information

This section will show the third-party how to view student class schedules, grades, and search for courses.

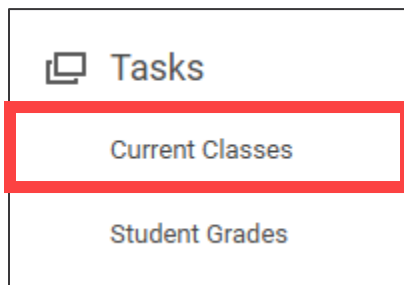
1. From the homepage, open the **Menu** in the top left-hand corner. Here you will see apps relevant to the information you can access as a third-party.



2. Select the **Academics for Third Party** app.



3. From the **Tasks** menu, click **Current Classes**.



Here you will find information about the student's current courses. The **My Completed Courses** table shows the courses the student has taken and has received a grade for. Courses listed under the **My Enrolled Courses** table are those the student is still enrolled in and has not yet completed. On this page you will also find information about the courses, number of credits the student is enrolled in, and load status.

Chiropractic Doctoral Program (DC)

2024 Fall Semester
My Enrolled Courses 1 item

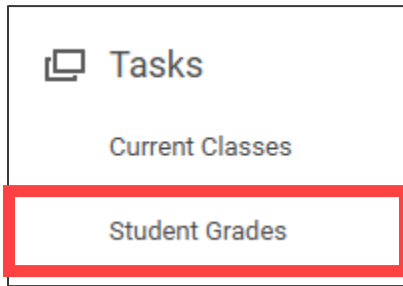
	Course Listing	Credits	Grading Basis	Section	Instructional Format	Delivery Mode
...	CFS 512 - Clinically Oriented Biochemistry	5	Graded	CFS 512-1 - Clinically Oriented Biochemistry	Lecture	In-Person

▼ **My Completed Courses**
3 items

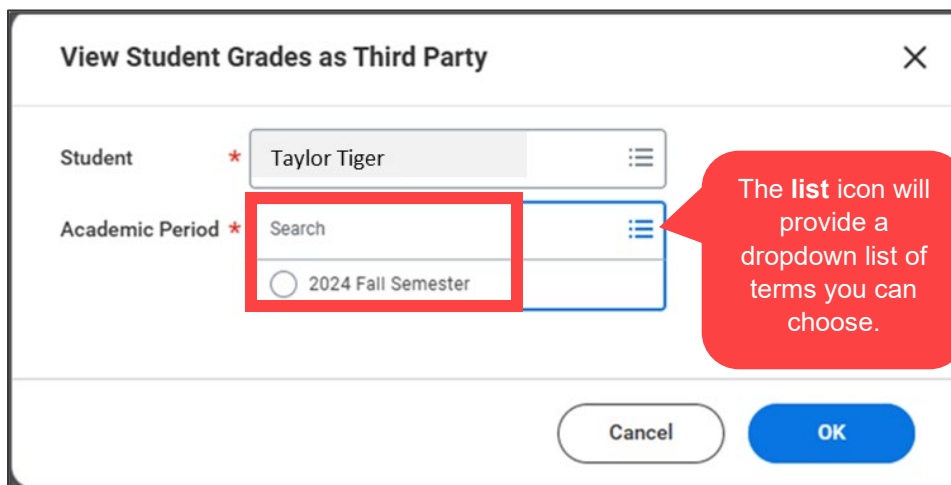
	Course Listing	Credits	Grading Basis	Section	Instructional Format	Delivery Mode
...	CFS 511 - Clinically Oriented Anatomy & Physi	7	Graded	CFS 511-1 - Clinically Oriented Anatomy & Physi	Lecture	In-Person
...	CFS 513 - Neuroanatomy and Development	4	Graded	CFS 513-1 - Neuroanatomy and Development	Lecture	In-Person
...	CFS 514 - Cell Physiology and Histology	3	Graded	CFS 514-1 - Cell Physiology and Histology	Lecture	In-Person

Enrolled Credits 19
Load Status Full-time

4. To view the student's grades, return to the **Tasks** menu and select **Student Grades**.



5. In the **View Student Grades as Third Party** dialogue box, your student's name will appear in the **Student** field. In the **Academic Period** enter the term for which you want to view grades (ex: 2024 Fall Semester). You can also click the **list** icon to populate a list of available terms you can choose from.



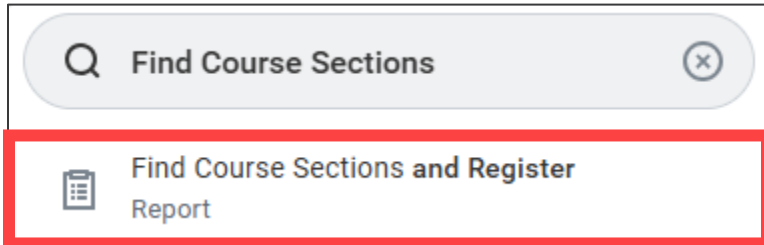
On the **View Student Grades as Third Party** page, you will be able to see the grades the student earned for courses taken during the academic period you chose in the previous step. The **Course Listing** table also provides you with pertinent course information such as instructor, credit hours, and grade points.

Course	Course Title	Credits	Grade	Course Enrollment Grade Points	Instructor
CFS 511 - Clinically Oriented Anatomy & Physi	Clinically Oriented Anatomy & Physi	7	A	4	
CFS 513 - Neuroanatomy and Development	Neuroanatomy and Development	4	A	4	
CFS 514 - Cell Physiology and Histology	Cell Physiology and Histology	3	A-	4	

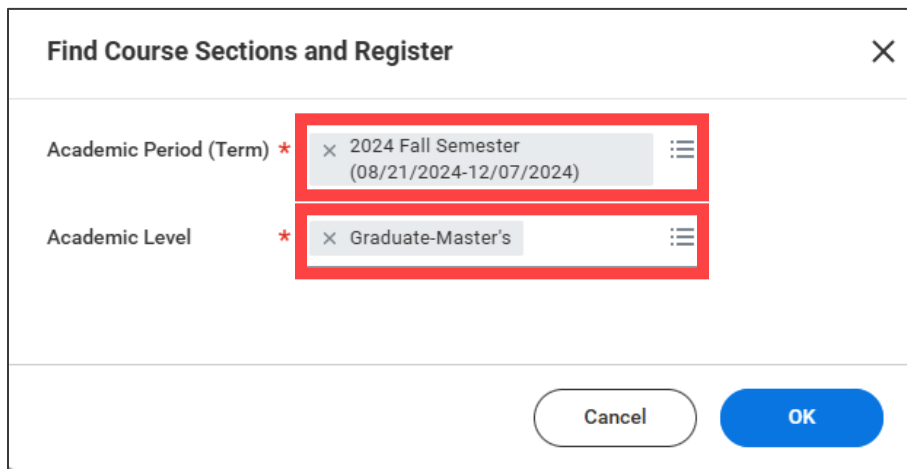
Academic Period GPA 4.000
Cumulative GPA 4.000

- 6. To view a listing of courses being offered, enter *Find Course Sections* in the **search bar** and select the report titled **Find Course Sections and Register**.

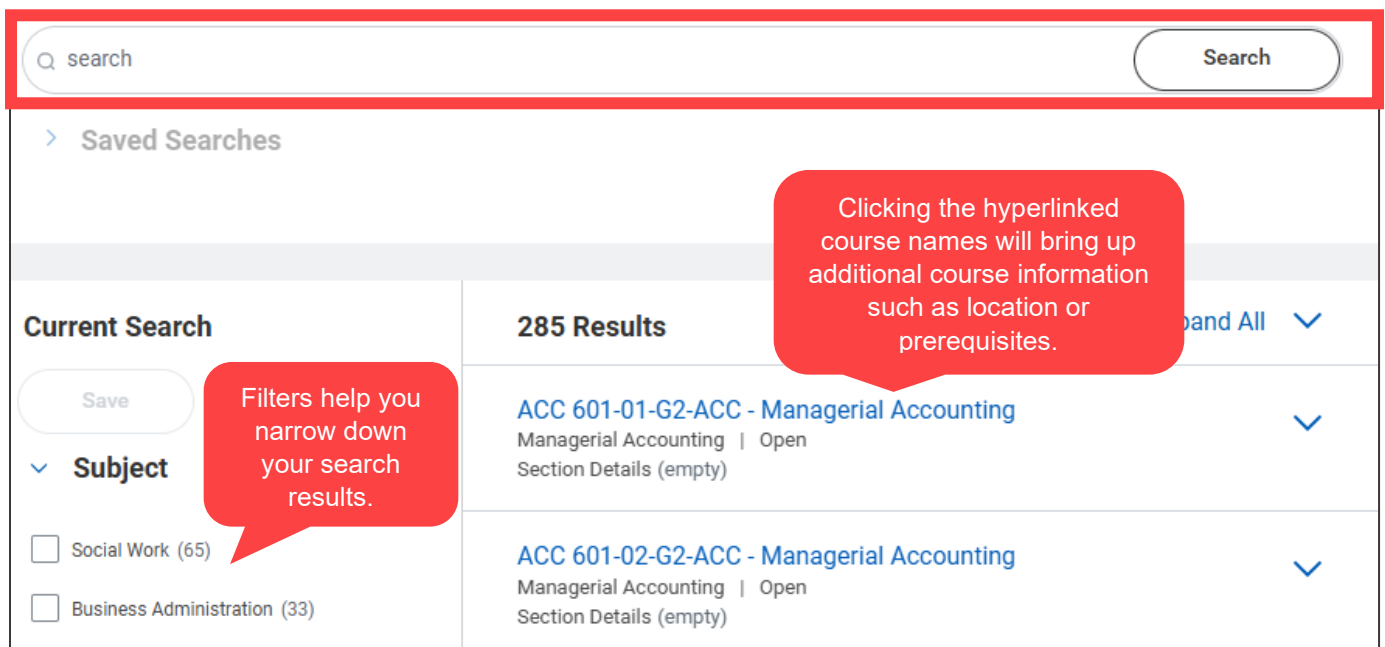
NOTE: You are not able to register for courses on your student's behalf.



- 7. In the **Find Course Sections and Register** dialogue box enter the **Academic Period** (ex: 2024 Fall Semester) and **Academic Level** (ex: Undergraduate or Graduate-Master's) of the courses you are searching for.



On this page you will see a listing of all the available courses offered. You can locate a course by searching for it using key words in the search bar, by using the filters on the left-hand side of the page, or by scrolling the list of results.



8. You can also easily navigate to run a new search for courses in a different academic period. At the top of the **Find Course Sections and Register** page, click the **Change Selection** icon.



This returns you to the **Find Course Sections and Register** dialogue box where you can enter a different academic period and/or academic level.

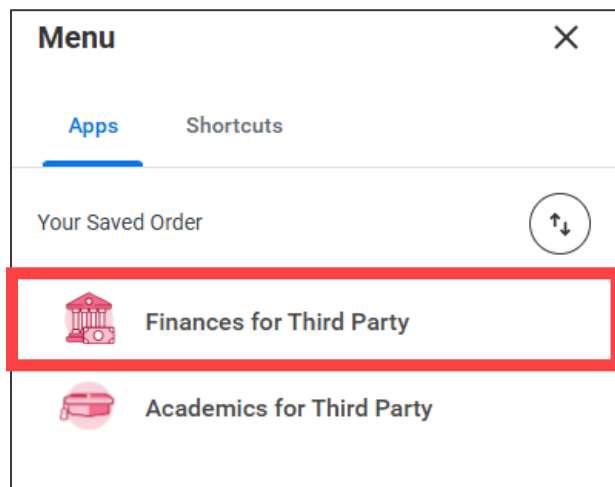
Accessing Student Financial Information

This section will show the third-party how to view student financial information, including account activity, statements, financial aid, and make payments.

1. From the homepage, open the **Menu** in the top left-hand corner. Here you will see apps relevant to the information you can access as a third-party.

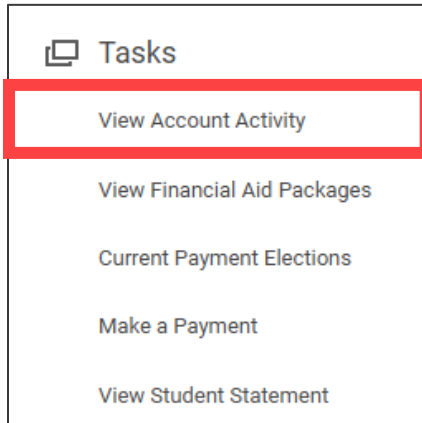


2. Select the **Finances for Third Party** app.

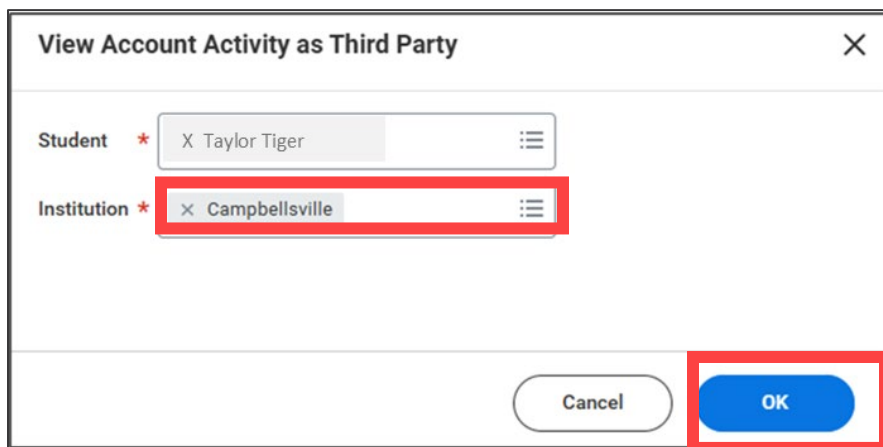


View Account Activity

1. From the **Tasks** menu, select **View Account Activity**.



2. In the **View Account as Third Party** dialogue box, ensure your student's name is in the **Student** field and select *Campbellsville* in the **Institution** field, then click **OK**.



On the **Student Account Activity** page you can review the total account balance as well as the amount currently due. You may see additional buttons that enable you to **Make a Payment** or **View Statement**. (If these are not visible to you, it is possible you student has not enabled these permissions). You can also review pertinent information about account transactions and details about the **Due Now** balance. When payments are made on a student's account, they will be visible in the **Transaction Summary**.

Total Account Balance 8,740.00

Due Now 8,740.00

[Make a Payment](#) [View Statement](#)

[Transaction Summary](#) [Due Now Details](#)

1 item

Academic Period	Transaction Date	Due Date	Description	Amount
2024 Fall Semester	11/12/2024	11/12/2024	Doctoral Tuition - Conover Education Center	8,740.00

You can also export this information to an excel document or PDF which you can then download and/or print.



View Student Statement

1. From the **Tasks** menu, select **View Account Activity**.

Tasks

- View Account Activity
- View Financial Aid Packages
- Current Payment Elections
- Make a Payment
- View Student Statement**

- 2. In the **View Student Statement as Third Party** dialogue box, enter a term in the **Academic Period** field (ex: 2024 Fall Semester) and click **OK**.

View Student Statement as Third Party [X]

Student * Taylor Tiger

Institution * Campbellsville

Academic Period * 2024 Fall Semester [Menu]

[Cancel] [OK]

On the **View Student Statements as Third Party** page, you can view a summary of student financials information like current charges, payments, and refunds, and generate a PDF to be able to download or print. You may also see a **Make a Payment** button. If you do not see it, you may not have permissions to access that task.

Student Taylor Tiger Date Range (08/21/2024-12/07/2024)

Student ID 1234567

Academic Period 2024 Fall Semester

Academic Level Doctorate

Anticipated Due	8,740.00
Charges	8,740.00
Applied Payments	0.00
Anticipated Payments	0.00
Refunds	0.00

Institution Campbellsville

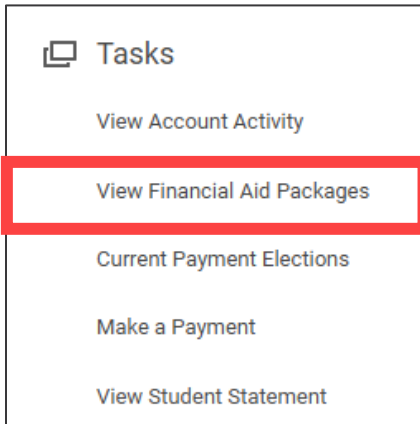
[Generate PDF] [View a Different Statement] [Make a Payment]

Charges 1 item

Date	Charge	Amount
11/12/2024	Doctoral Tuition - Conover Education Center	8,740.00

View Student Financial Aid

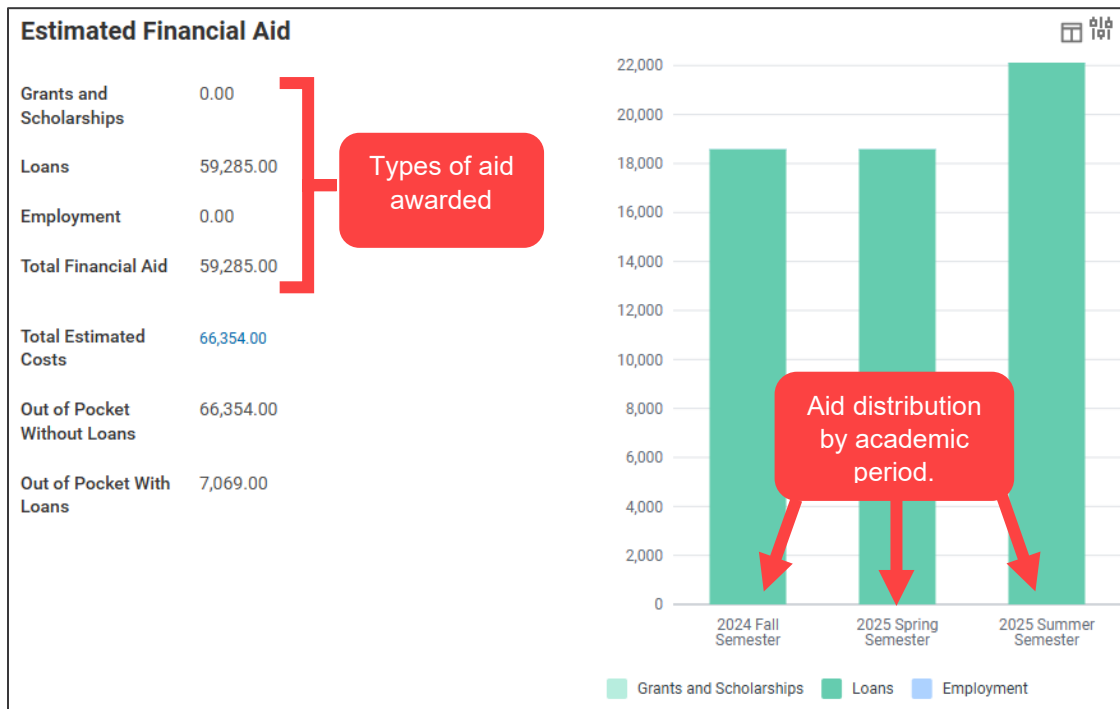
1. Navigate back to the **Tasks** menu and select **View Financial Aid Packages**.



2. In the **View Financial Aid as Third Party** dialogue box, select *Campbellsville* in the **Institution** field and choose the correct year in the **Award Year** field. Click **OK**.



On the **View Financial Aid as Third Party** page you will be able to see the details of the financial aid offer available to your student. This information includes types of aid, estimated costs, and distribution of aid over academic periods.



You can also view detailed tables under the **Financial Aid Overview** and **Estimated Costs** tab, which includes financial aid awards and costs broken down by each academic period.

Financial Aid Overview **Estimated Costs**

▼ **Awards Breakdown**

2024 Fall Semester Awards

1 item

Award Type	Amount Offered	Amount Accepted	Status	Disbursement Schedule	
				Anticipated Disbursement Amount	
Federal Direct Unsubsidized Loan - Graduate/Professional	18,583.00	0.00	Offered	18,387.00	

Financial Aid Overview **Estimated Costs**

▼ **Estimated Cost Breakdown**

2024 Fall Semester Estimated Costs

6 items

Cost Item	Estimated Institutional Costs	Estimated Non-Institutional Costs
Personal Expenses	0.00	1,594.00
Books, Course Materials, Supplies, & Equipment	0.00	500.00
Commuter Food & Housing	0.00	5,621.00
Transportation	0.00	3,260.00
Loan Fees	0.00	103.00
Tuition & Fees	11,040.00	0.00

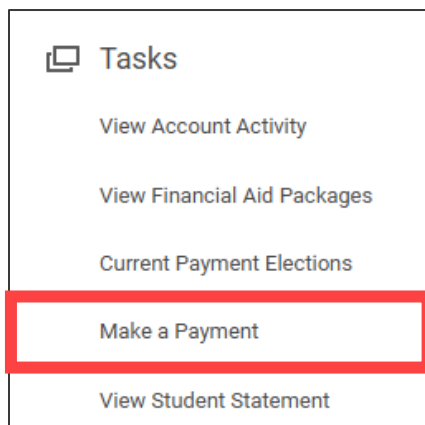
You can also export this information to an excel document or PDF which you can then download and/or print.



Make Payments

Campbellsville University utilizes **Transact** to process student account payments. The steps outlined below will show the third-party how to navigate to the **Make a Payment** task, but please note that the actual submission of payment is completed in **Transact**. Workday will redirect users to **Transact**.

1. Navigate back to the **Tasks** menu and select **Make a Payment**.



2. In the **Make a Payment as Third Party** dialogue box, select *Campbellsville* in the **Institution** field and click **OK**.



Another dialogue box will appear with an important notice. Notice the message stating that you will be redirected outside of the Workday application. When you click **OK**, you will be redirected to the **Transact** site to complete your payment.

Enroll in Payment Plans

As noted in the **Make a Payment** section, Campbellsville University utilizes **Transact** to process student account payments. Transact is also where students and/or third-parties can explore and enroll in available payment plans.