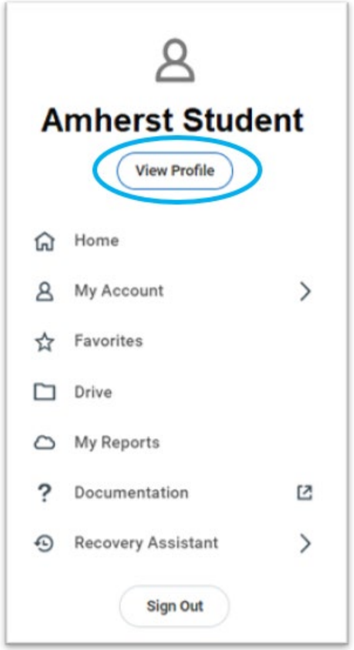
Assigning a Third-Party User to Your Student Account

Instructions for authorizing family/friends as third-party users to your account. This access will be helpful to those who make payments towards your College tuition or who claim you as a dependent on their taxes.

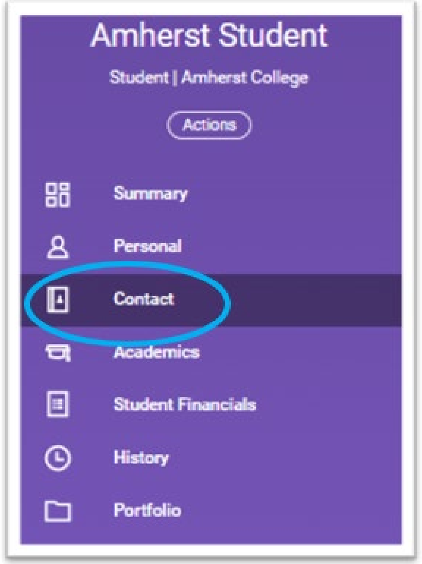
STEP 1

Log into Workday, click on your photo in the upper right hand corner and select **View Profile.**



STEP 2

On the left hand side, in the purple toolbar, select **Contact**.

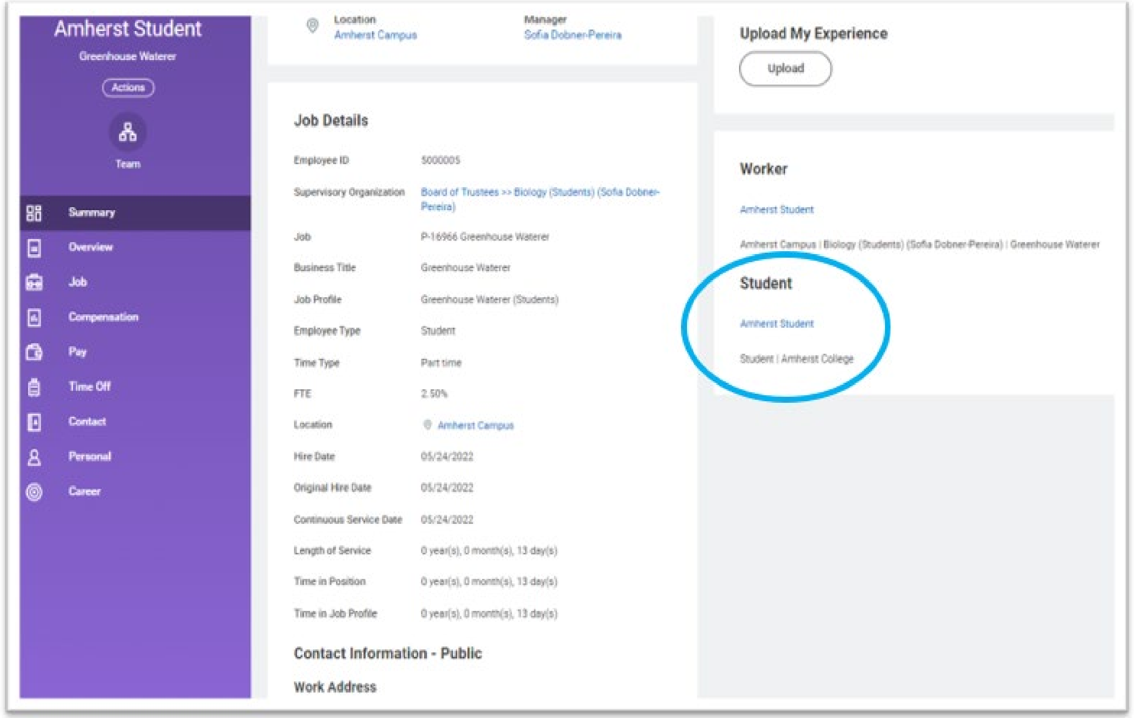


STEP 3

Select the **Friends and Family** tab.

★ IMPORTANT FOR STUDENT WORKERS:

To assign a third-party user, ensure you are on your **Student Profile.** To access your student profile, select your name under **Student** on the summary page. Note: This could appear on right or at the bottom of your summary page based on the device you are working on.



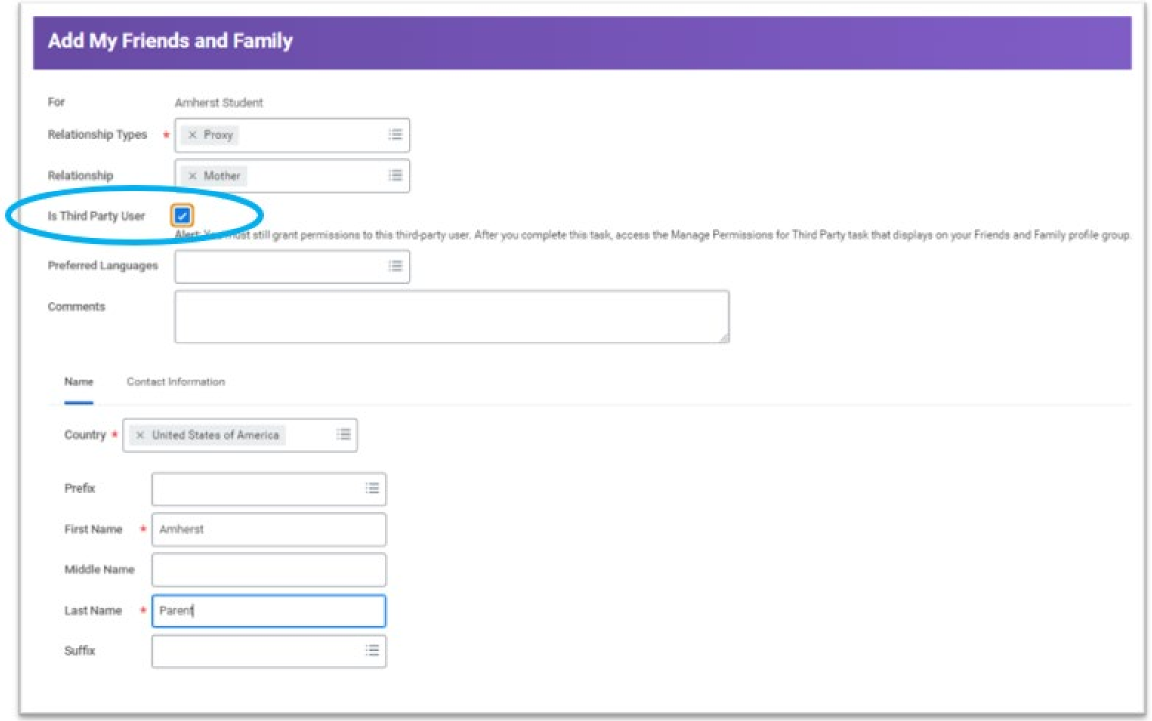
Amherst College

STEP 4

If the individual you would like to assign third-party access to **does not** appear in the list, select **Add.**

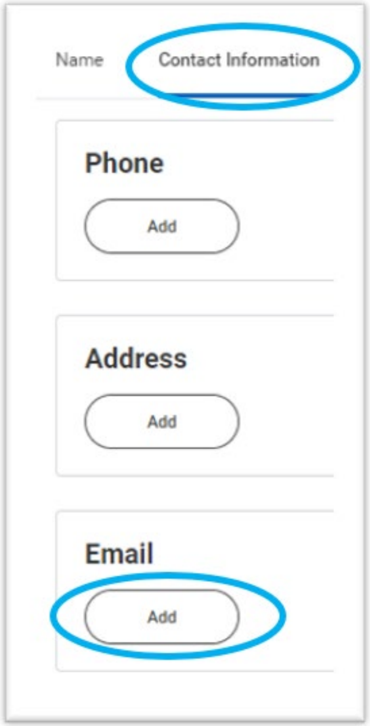
You will then be prompted to input the following information about the individual:

- Relationship Types
- **Is Third Party User** be sure to check this box
- Country
- First Name
- Last Name



STEP 5

Next, select the **Contact Information** tab.



Input the following information for the individual:

- Phone Number
- Address
- Email Address (Required)

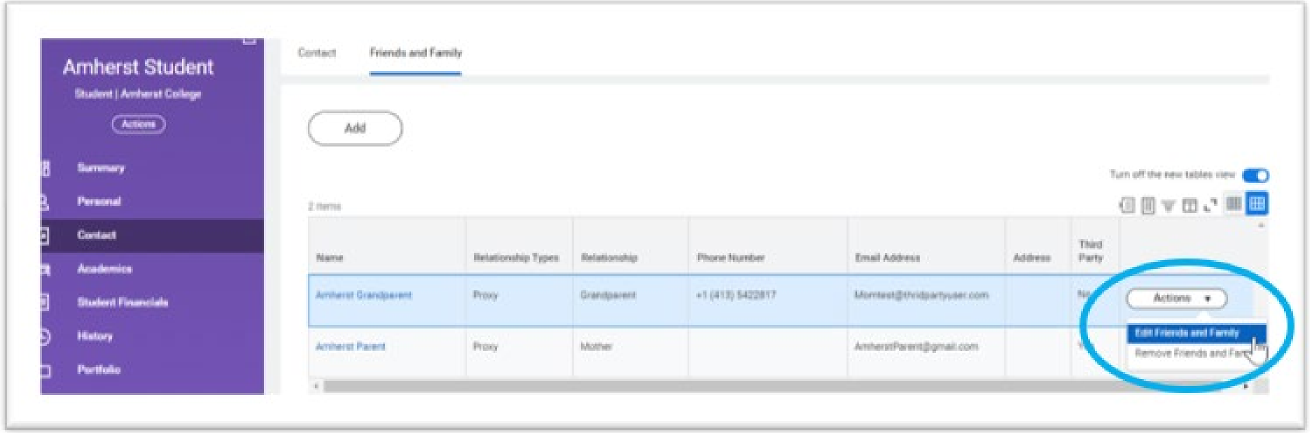
To save your updates, click **OK**, then **DONE**.

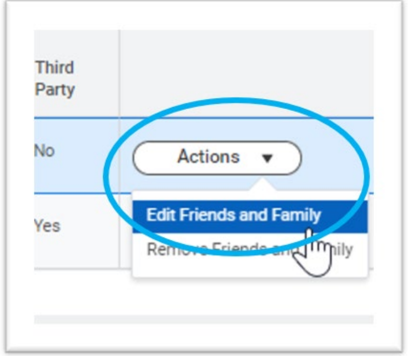
★ IMPORTANT

Be sure the email address you are inputting is correct and current. If the third-party wishes to communicate with our Office it must be done so with that email address or must be validated when calling.

STEP 6

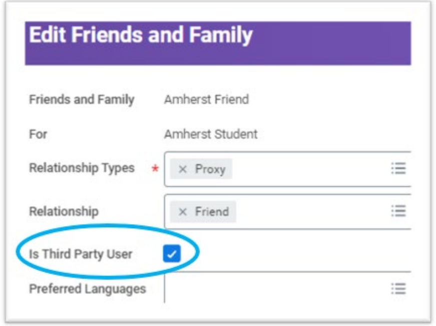
If the individual you would like to assign third-party access to **does** appear in the list, navigate to their name and select **Actions** then **Edit Friends and Family**.



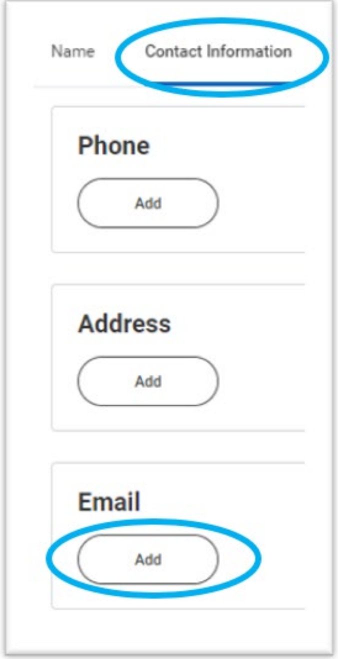


STEP 7

Next, select the check box next to **Is Third Party User**. Then select the **Contact Information tab**.



Next, select the **Contact Information** tab.



Input the following information for the individual:

- Phone Number
- Address
- Email Address (Required)

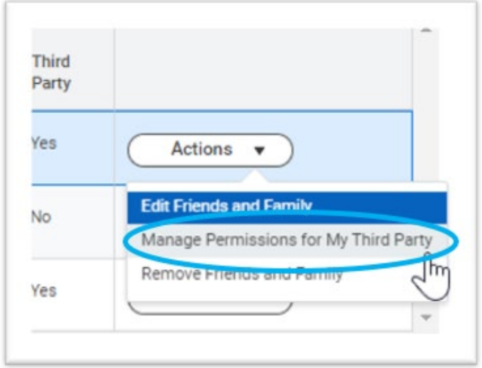
To save your updates, click **OK**, then **DONE**.

IMPORTANT

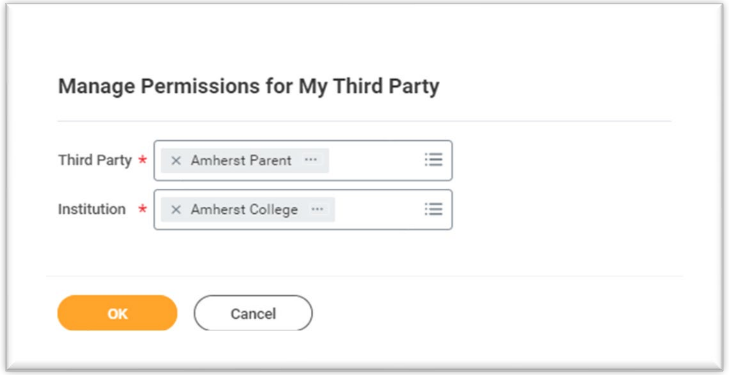
Be sure the email address you are inputting is correct and current. If the third-party wishes to communicate with our Office it must be done so with that email address or must be validated when calling.

STEP 8

Now that you have given your family/friend third party access, you will now need to manage their permissions. Back in your list of contacts, find the individual you added and want to have third party access, select **Actions** then **Manage Permissions for My Third Party**.

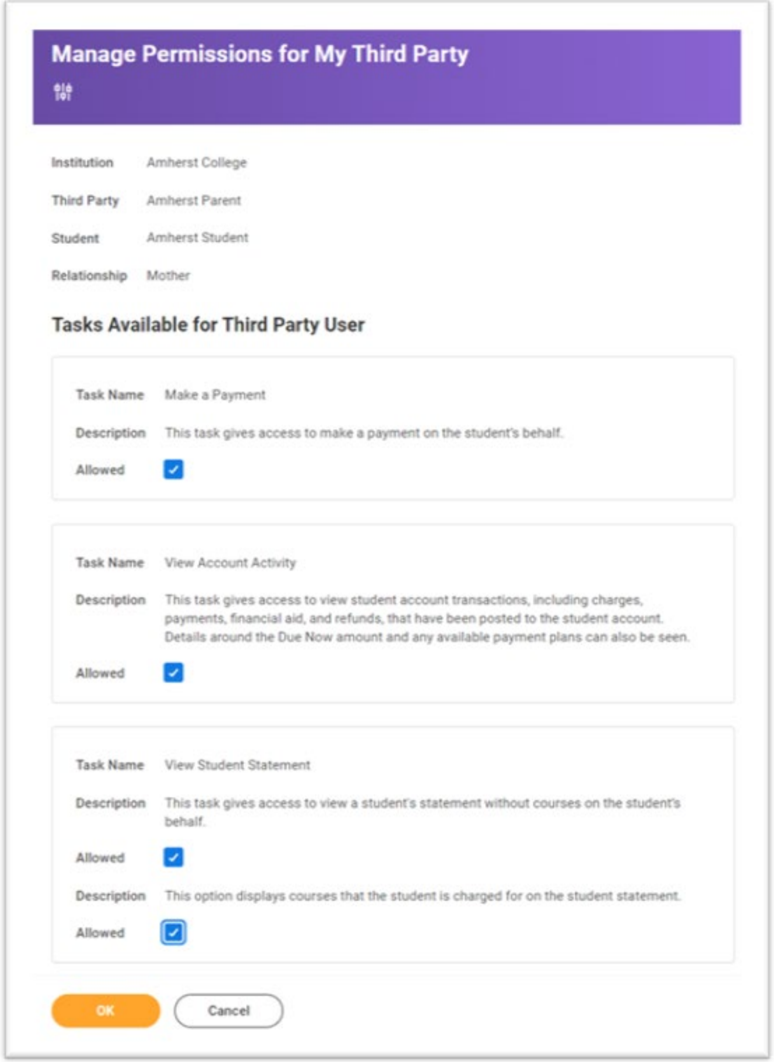


Confirm the **Third Party** and **Institution** are correct, then click **OK**.



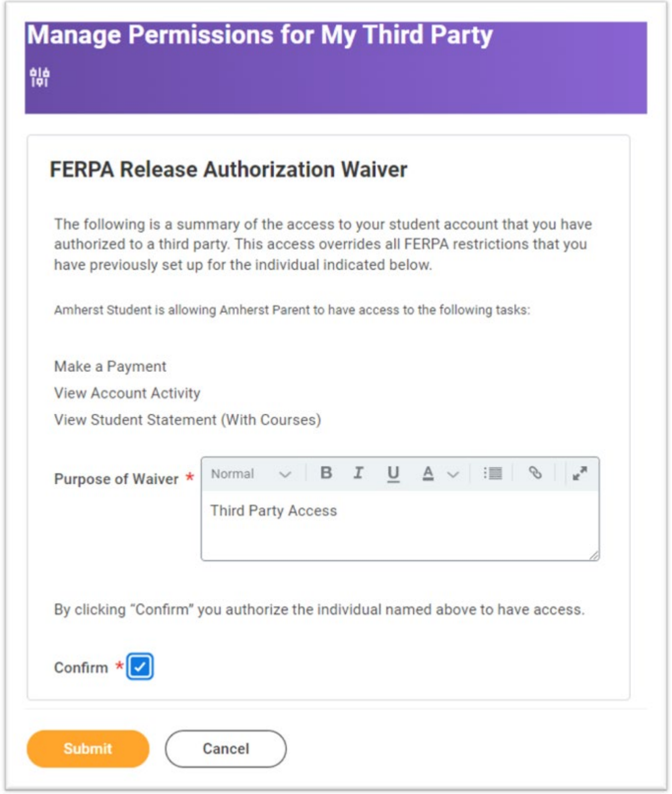
STEP 9

Next, select the following Tasks Available for Third Party user, including: **Make a Payment, View Account Activity,** and **View Student Statement**. Then select **OK**



STEP 10

Next you will be required to submit the **FERPA Release Authorization Waiver** by checking the **Confirm** box. In the **Purpose of the Waiver** field, simply input Parent Access or Third Party Access (this is a Workday delivered required field). Last, select **Submit**.



Manage Permissions for My Third Party

FERPA Release Authorization Waiver

The following is a summary of the access to your student account that you have authorized to a third party. This access overrides all FERPA restrictions that you have previously set up for the individual indicated below.

Amherst Student is allowing Amherst Parent to have access to the following tasks:

Make a Payment
View Account Activity
View Student Statement (With Courses)

Purpose of Waiver * Normal B I U A

Third Party Access

By clicking "Confirm" you authorize the individual named above to have access.

Confirm *

Submit Cancel

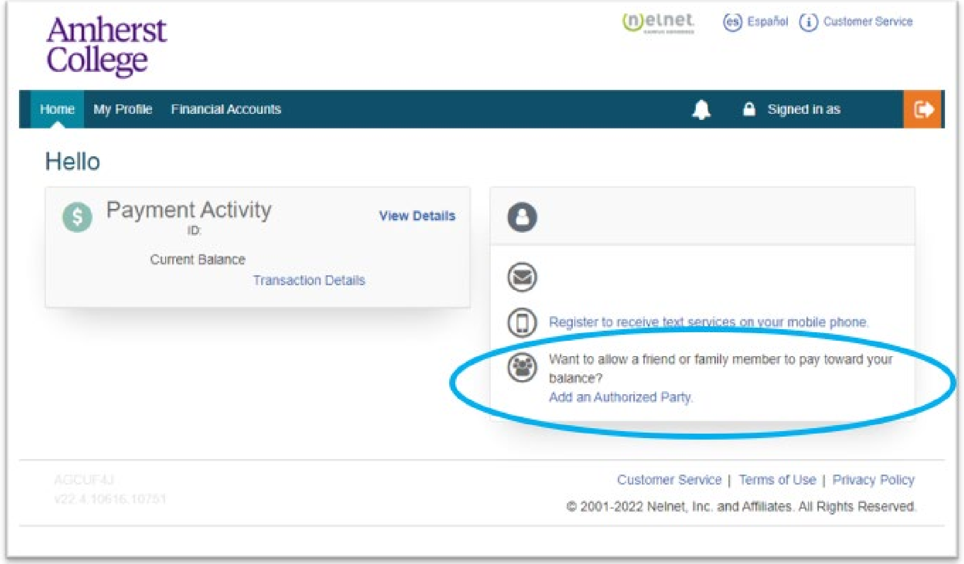
After you select **Submit**, the individual you assigned to have **Third Party Access** will receive two emails from Workday. One with a username, and a second with a temporary password. Both emails will provide a link that your **Third Party Access** contact can use to log into Workday, and bookmark for easy future access.

Assigning an Authorized User (Third – Party) to Your Nelnet Account

Amherst College

STEP 1

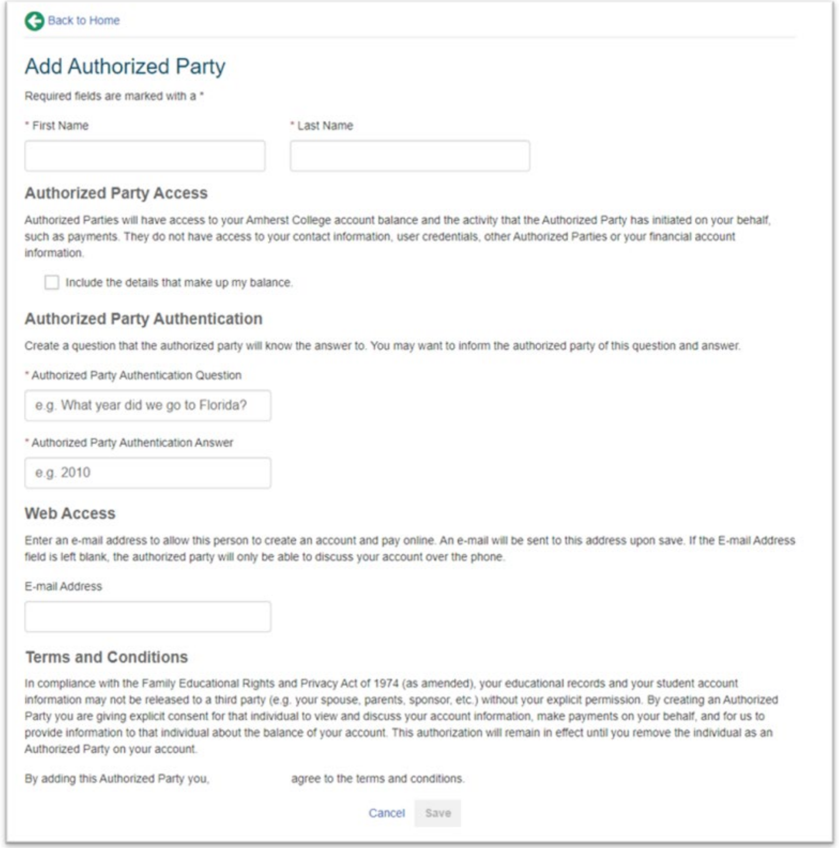
Log into Workday, navigate to the Finances App and select **Make a Payment**. You will be directed to Nelnet's website. There, select the **Add an Authorized Party** found on the right hand side of your browser.



STEP 2

Input the following information for the **Authorized User (Third-Party):**

- First Name
- Last Name
- Check the **Include the details that make up my balance** box
- Enter an authentication question that your Third-Party user will know the answer to (will be required for the Third-Party to answer correctly to enroll)
- Enter their email address



IMPORTANT

Be sure the email address you are inputting is correct and current. If the third-party wishes to communicate with our Office it must be done so with that email address or must be validated when calling.

Read the **Terms and Conditions**, if you agree, select **Save.** Your Third-Party user will receive an email invitation to sign up with Nelnet. This will require them to answer your **Authorized Party Authentication Question** correctly to continue and create an account/enroll in a payment plan.