

Third Party

# Third Party Accessing Workday

This job aid provides instructions for individuals granted third-party access (also called “proxy” access) by a student to view the student’s financial information, pay bills, and/or to view grades or class schedule at Howard University.



Note: When you are granted third-party access by a student at Howard University, you will receive two emails: one with your new BisonHub username and a second with a temporary password. These emails are sent automatically after the student completes the task of listing you as a third-party.

## ACCESSING WORKDAY FOR THE FIRST TIME

After a student grants third-party permissions, log in credentials will be sent via email. Use these credentials to log in to BisonHub and reset your password as prompted.

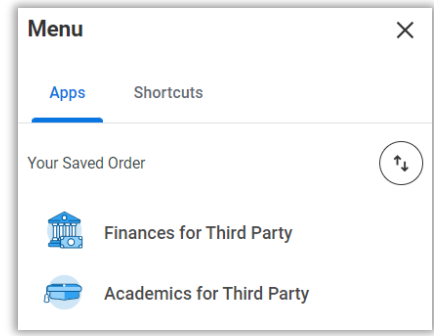
After logging in, add the academic and financial applications to Menu to view student information.

1. Select **Menu** in the upper right.



2. Click .
3. Enter **Academics for Third Party**. Click ⊕ to add to Menu.
4. Enter **Finances for Third Party**. Click ⊕ to add to Menu.
5. After adding both applications, click ← [Back to Menu](#) .

6. The menu should now display Finances and Academics applications.




Menu and applications

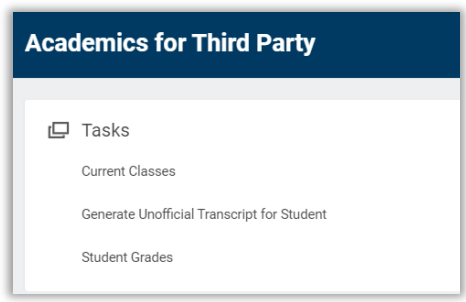
## VIEWING APPROVED STUDENT INFORMATION

Students control third-party access to their information, so this access can be changed, removed, or updated at any time from the student profile.

### ACADEMICS FOR THIRD PARTY DASHBOARD

1. Click **Menu**, then select  Academics for Third Party .
2. The Academics for Third Party page will display with available tasks.
3. Select a task to view student information. Students having granted third-party access to you will display. Select the required student and click **OK**.

Third Party

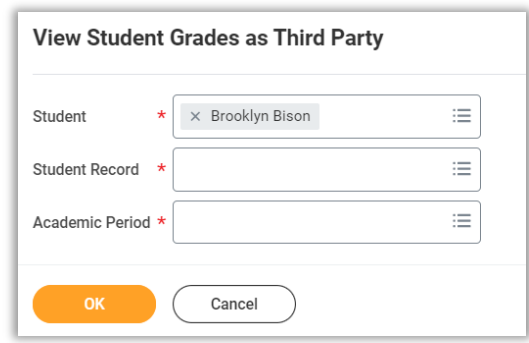


Academics for Third Party display




Note: The tasks available are dependent on access granted by the student.

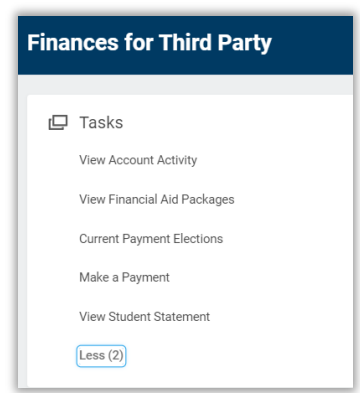
- a. **Current Classes:** Click to view the student’s current enrolled classes.
- b. **Generate Unofficial Transcript for Student:** Click to generate a PDF of an unofficial transcript on behalf of the student.
- c. **Student Grades:** Click to view the past and current grades for the student. After selecting, a dialogue box will display. Click in the fields to select the Student Record and Academic Period from the drop-down.



View Student Grades as Third Party dialogue box

FINANCES FOR THIRD PARTY DASHBOARD

1. Click **Menu**, then select  **Finances for Third Party**.
2. The Finances for Third Party page will display with available tasks.



Finances for Third Party display



### Third Party

- 3. Select a task to view student information. If not all tasks display, click [More \(2\)](#).



**Note:** The tasks available are dependent on access granted by the student.

- 4. Students having granted third-party access to you will display. Select the required student and click **OK**.
  - a. **View Account Activity:** Click to view total account balance, due now details, and a transaction summary.

| Student Account Activity  |                   |
|---|-------------------|
| Student   | Brooklyn Bison    |
| Institution   | Howard University |
| Total Account Balance   | 0.00              |
| Due Now   | 0.00              |
| <a href="#">Make a Payment</a> <a href="#">View Statement</a>       |                   |
| <a href="#">Transaction Summary</a> <a href="#">Due Now Details</a> |                   |

Student Account Activity display

- b. **View Financial Aid Packages:** Click to view estimated financial aid for selected student. Scroll down to view award year breakdown and estimated costs per academic period.

| View Financial Aid as Third Party |                |
|-----------------------------------|----------------|
| Student                           | Brooklyn Bison |
| <b>Estimated Financial Aid</b>    |                |
| Grants and Scholarships           | 0.00           |
| Loans                             | 0.00           |
| Employment                        | 0.00           |
| Total Financial Aid               | 0.00           |
| Total Estimated Costs             | 27,409.00      |
| Out of Pocket Without Loans       | 27,409.00      |
| Out of Pocket With Loans          | 27,409.00      |

Student Estimated Financial Aid display

- c. **Current Payment Elections:** View and edit payment elections entered for the student. Payment elections are used for making payments and receiving refunds.

| Payment Elections  |                          |
|--|--------------------------|
| Enter below the information of the bank account you would like to use for making payments and receiving refunds. |                          |
| Person   | Father Bison             |
| Default Country  | United States of America |
| Default Currency   | USD                      |

Student Payment Elections display

- d. **Make a Payment:** Click to make a payment on the student's account. View Total Account Balance and Due Now amount. Either type in the Payment Description or click in the field to select the payment from the drop down. If selected from drop-down, the payment type and amount will auto-populate. If typed, manually enter the payment type and amount.



Third Party

← Make a Payment as Third Party ×

Student Brooklyn Bison

Total Account Balance 0.00

Due Now 0.00

Payment Description \*

Payment Type \*

Payment Amount \* 0.00

Currency \* USD

OK Cancel

Make Payment as Third Party dialogue box

- e. **View Student Statement:** Click to view student's financial statement for a specific academic period.

View Student Statement as Third Party

Student \* Brooklyn Bison

Institution \* Howard University

Academic Period \*

OK Cancel

View Student Statement as Third Party dialogue box