

# How to Add Emergency Contacts and Third Party Proxy Access

A Third Party Proxy is a parent, guardian, or anyone else that the student designates to have online access to their student financial and academic information. We recommend that students set up a parent or guardian as a Third Party Proxy, and grant access, to allow for communication and information about your student account.

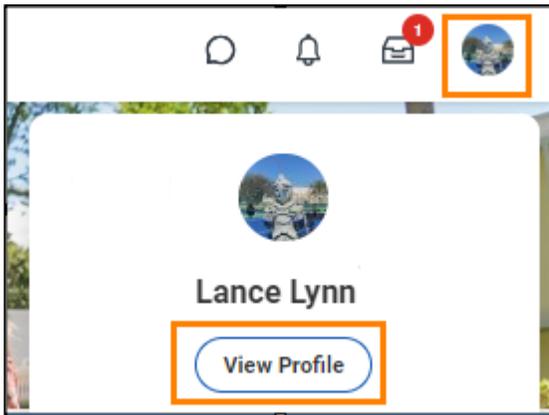
Here's how to add your emergency contact information and provide account access to a third-party, which may be useful if someone else pays/view your bills or view your academic records.

On this job aid:

- [Access Profile](#)
- [Add Emergency/Third Party Contact](#)
- [Third Party User](#)
- [Manage Permissions for My Third Party](#)
- [FERPA Release Authorization Waiver](#)
- [For Parent/Proxy with multiple students at Lynn](#)
- [Edit or Delete Emergency/Third Party Contact](#)

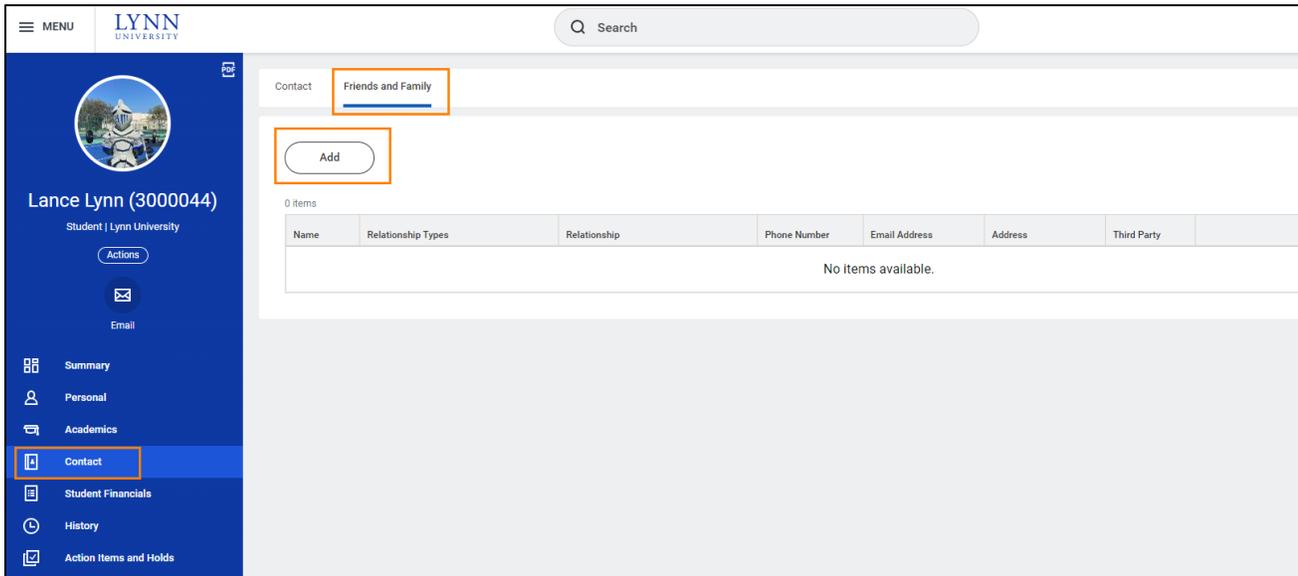
## Access Profile

After logging into Workday, click on the **Cloud** icon, and then select **View Profile**.



On the profile menu, select **Contact**, and then click the **Friends and Family** tab.

Click **Add** to create a new contact.



## Add Emergency/Third Party Contact

Enter your contact's information.

The 'Add My Friends and Family' form contains the following fields and sections:

- For:** Lance Lynn (3000044)
- Relationship Types:** Required field with a dropdown menu.
- Relationship:** Dropdown menu.
- Is Third Party User:** Check box.
- Preferred Languages:** Dropdown menu.
- Comments:** Text area.
- Name:** Section header for contact information.
- Country:** Required field with a dropdown menu (currently set to United States of America).
- Prefix:** Dropdown menu.
- First Name:** Required text field.
- Middle Name:** Text field.
- Last Name:** Required text field.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

Under Relationship types, select Emergency Contact (and all other that apply).

A screenshot of a contact role selection menu. At the top, there are two tabs: "Emergency Contact" and "Parent", both with an "x" icon to their left. Below the tabs is a search bar with the text "Search". A list of roles follows, each with a checkbox and a label: "Emergency Contact" (checked), "International Agent", "Legacy", "Legal Guardian", "Next of Kin", "Parent" (checked), "Proxy", and "Recommender".

## Third Party User

To grant third-party access, you must check the box labeled **Is Third Party User**. Specific permissions will be granted in a separate screen.

A screenshot of a form field labeled "Is Third Party User" with a checked checkbox. Below the checkbox is an alert message: "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."

## Enter contact's name

A screenshot of a contact information form. The form has two tabs: "Name" (selected) and "Contact Information". Under the "Name" tab, there are several fields: "Country" (with a dropdown menu showing "United States of America"), "Prefix" (empty), "First Name" (with "Mom" entered), "Middle Name" (empty), "Last Name" (with "Lynn" entered), and "Suffix" (empty). Each field has a small menu icon to its right.

Under Contact Information, you must add at least a contact phone number and email address.

Name
Contact Information

**Phone**

Add

**Address**

Add

**Email**

Add

Under Phone Device, select Mobile Opt-In Texting to include number on automated emergency notifications.

Phone Device

Mobile Opt-In Texting

At this point, you'll be asked to review your contact's information. If everything looks accurate, click **Done**.

To confirm your contacts' information, simply return to the **Contacts** section, and click the **Friends and Family** tab, where you will see a list of your contacts. Be sure the Third Party section says **Yes**.



**Lance Lynn (3000044)**  
Student | Lynn University

Actions

Email

Summary

Personal

Academics

Contact

Contact
Friends and Family

Add

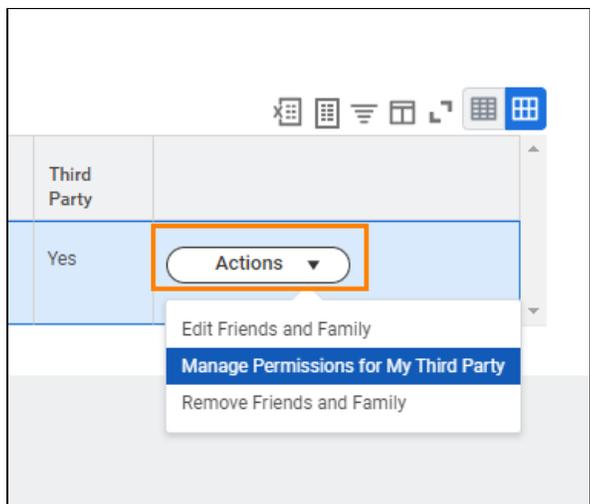
1 Item

| Name     | Relationship Types          | Relationship | Phone Number    | Email Address    | Address | Third Party | Actions   |
|----------|-----------------------------|--------------|-----------------|------------------|---------|-------------|-----------|
| Mom Lynn | Emergency Contact<br>Parent |              | +1 561-237-7300 | MomLynn@lynn.edu |         | Yes         | Actions ▾ |

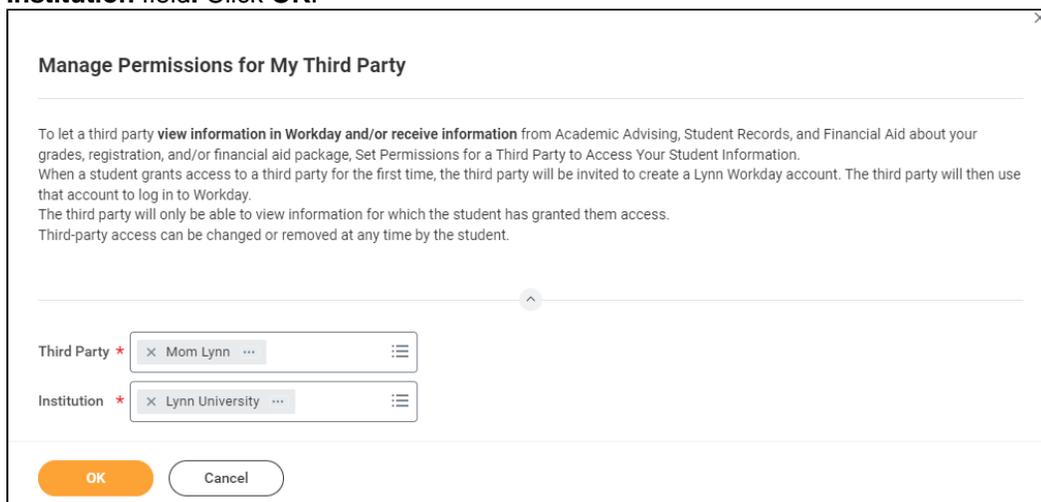
## Manage Permissions for My Third Party

Select **Contact** from the left navigation, and then click the **Friends and Family** tab. Use the horizontal scrolling bar and move all the way to the right until you see the **Actions** button.

Click the **Actions** button and in the drop-down menu, select **Manage Permissions for My Third Party**



Confirm that the correct third party contact name appears in the **Third Party** field and **Lynn University** in the **Institution** field. Click **OK**.



Under **Tasks Available for Third Party Users**, select the tasks you'd like to allow your contact to access:

- Make a Payment
- View Financial Aid Package
- View Account Activity
- View Student Statement
- View Current Classes
- View Student Grades
- Generate Unofficial Transcript

**Manage Permissions for My Third Party**

To let a third party **view information in Workday and/or receive information** from Academic Advising, Student Records, and Financial Aid about your grades, registration, and/or financial aid package, Set Permissions for a Third Party to Access Your Student Information. When a student grants access to a third party for the first time, the third party will be invited to create a Lynn Workday account. The third party will then use that account to log in to Workday. The third party will only be able to view information for which the student has granted them access. Third-party access can be changed or removed at any time by the student.

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**Institution** Lynn University  
**Third Party** Mom Lynn  
**Student** Lance Lynn (3000044)  
**Relationship** (empty)

**Tasks Available for Third Party User**

**Task Name** Make a Payment

**Description** This task gives access to make a payment on the student's behalf.

**Allowed**

**Task Name** View Financial Aid Package

**Description** This task gives access to view the financial aid details on the student's behalf, including details around what financial aid is offered and what the estimated costs are for the year.

**Allowed**

Click **Submit**.

## FERPA Release Authorization Waiver

Review the **FERPA Release Authorization Waiver**. In the **Purpose of Waiver** field, type in "Parent Permission." Then check the **Confirm** box, click **Submit**, and then click **Done**.

**Manage Permissions for My Third Party**

To let a third party view information in Workday and/or receive information from Academic Advising, Student Records, and Financial Aid about your grades, registration, and/or financial aid package, Set Permissions for a Third Party to Access Your Student Information.

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**Privacy 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 on your student account for the individual indicated below.

Lance Lynn (3000044) is allowing Mom Lynn to have access to the following tasks:

- Make a Payment
- View Account Activity
- View Financial Aid Package
- View Student Statement (Without Courses)

**Purpose of Waiver \***

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

**Confirm \***

enter your comment

**Submit** **Cancel**

Please notify your parent or guardian that two emails will be sent to the email address you provided. The first email contains their username; the second email includes their temporary password, along with a link to the parent portal.

Click the job aid [Workday Third Party Proxy: Parents And Friends](#) for detailed instructions.

## For Parent/Proxy with multiple students at Lynn

If another Lynn student, such as your sibling, already added a third-party proxy user with the same name and email address, after you manage permissions for that third party, you will receive an additional task in Workday to link the proxy accounts together.

### You have submitted

Up Next: Student Proxy as Self | Approve Friends and Family Linking

[View Details](#)

Click Review to review the access you granted this person to your information.

**View Event** [Manage Permissions for Mom Lynn](#) ⋮

03/13/2024 - Successfully Completed

For Mom Lynn

Overall Process [Manage Permissions for Mom Lynn](#)

Overall Status Successfully Completed

**Details** Process

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Institution Lynn University

Third Party Mom Lynn

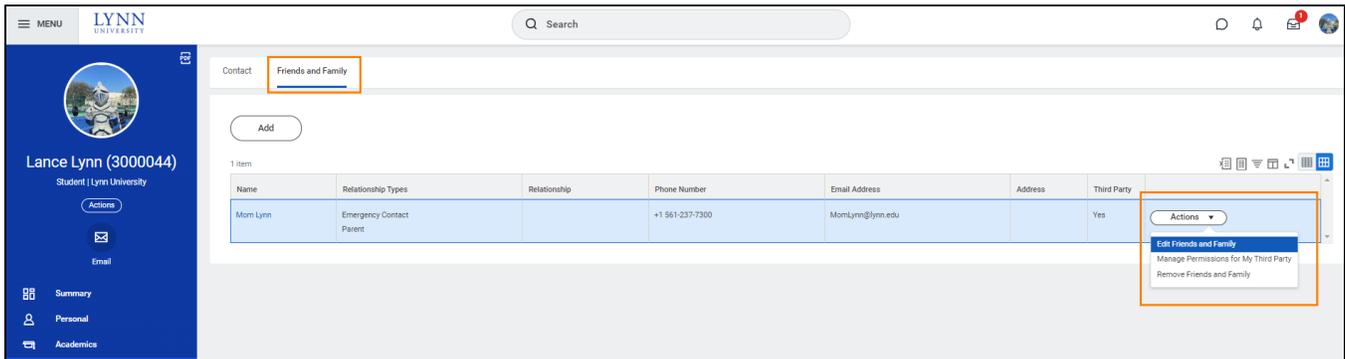
Click Approve to complete the account linking.

This third-party user can now use the same Workday username and password to access information for both students; the access available is set by each student for their own.

## Edit or Delete Emergency/Third Party Contact

On the profile menu, select **Contact**, and then click the **Friends and Family** tab

Select **Contact** from the left navigation, and then click the **Friends and Family** tab. Use the horizontal scrolling bar and move all the way to the right until you see the **Actions** button. Click the **Actions** button and in the drop-down menu, select **Edit Friends and Family** or **Remove Friends and Family**.



Follow instructions.