

## Set Up Your Third Party Account

### Introduction

Learn how to set up your Workday account as a third party (parent, guardian, spouse, etc.) and view your student's information.

### Account Setup

You will receive your Workday username and password in two separate emails. Once you receive your Workday username and temporary password, follow these steps to set up your Workday account as a third-party proxy.

1. Log into your Workday account. If you have not logged into your Workday account yet, select the link found in your *Welcome email* and enter your username and temporary password to navigate to the ISU Workday page. If you are an Iowa State University employee, you must use your ISU email address.
2. Reset your password.
3. Bookmark the login page for future use.

### View Your Student's Information

Follow these steps to view your student's information. Your student has granted you access to specific information and tasks. If an option is not available for you, you do not have access.

1. Log into your Workday account.
2. Select **Menu** in the top left corner.
3. Select **Finances for Third Party** to view financial links such as view account activity, financial aid packages, statements, and make a payment or select **Academics for Third Party** to view academic links such as current classes, transcripts, grades, etc.
4. Select the task you would like to complete (e.g., View Account Activity).
5. Your student's name populates. If you have more than one student, select the specific student's name in the *Student* field. Select **Iowa State University** in the *Institution* field and then select **OK**.
6. View your student's information and/or complete the task. For example,
  - a. If you select **View Account Activity**, you can view your student's financial account activity under the *Transaction Summary* tab. View the amount currently owed for your student's account under the *Due Now Details* tab.
  - b. If you select **Make a Payment**, please note U-Bill and U-Bill payments will continue in AccessPlus through July 19, 2024, and cannot be made through Workday at this time. Please contact Accounts Receivable at 515-294-7388 or [ubill@iastate.edu](mailto:ubill@iastate.edu) with questions.
  - c. If you select **View Student Statement**, you can view more details regarding your student's financial account organized by academic period.