

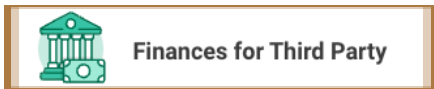
Students at Endicott College can grant access to a Friends & Family contact within Workday by setting up "Third Party Access." The Student will need to grant permissions for their Friends and Family contact in Workday. Access will vary based on granted permissions.

The following job aid will outline steps for accessing the Finance for Third Party application. This includes Making Payments (on external site), Viewing Financial Account Activity, Viewing a Student Financial Statement and Viewing Financial Aid Packages.

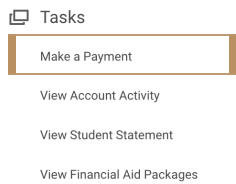
Process to Make a Payment (on external site)

1. Log-in to the Endicott Workday <https://impl.workday.com/indicott>

2. From the homepage or from your Menu, select the **Finance for Third Party** app



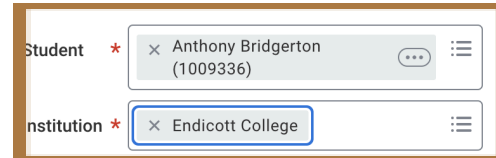
3. The **Finance for Third Party** app will open. If permissions have been granted, you will be able to see **Make a Payment**, **View Account Activity**, **View Student Statement** and **View Financial Aid Packages**.



4. **IMPORTANT! Payments are processed through Nelnet. Once you select Make a Payment from within Workday, you will be brought to an external website for Nelnet.**

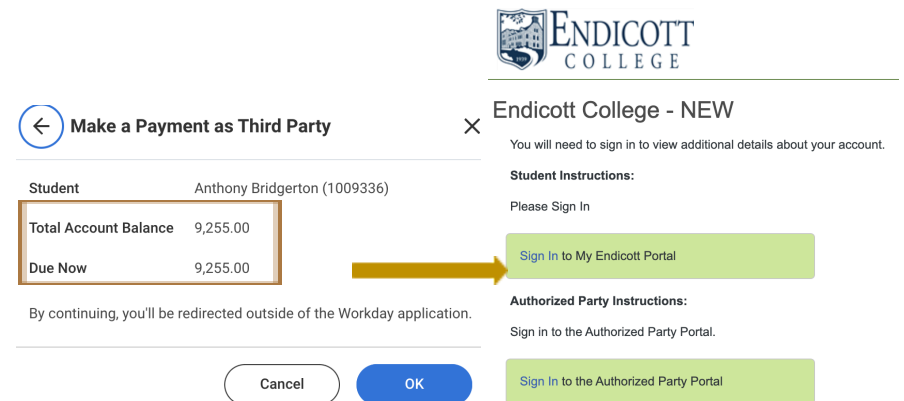
- If you are paying on behalf of the student, the student must set up their account first and then add you as an Authorized Payer in Nelnet. If you have used Nelnet before, simply Sign In to manage your account.
- Select **Make a Payment**. The prompt should default to your **Student's** name. If you have multiple Students, you can change the name by selecting the X and typing another Student name and selecting enter.
- For Institution, select **Endicott College** from the drop down then select **OK**.

Make a Payment as Third Party



8. You will see a quick summary of the **Total Account Balance** and payment **Due Now**. When you select **OK**, you will be directed to the external Nelnet site for payment.

**NOTE: the below images are generated for training purposes only and are not intended to be accurate.**

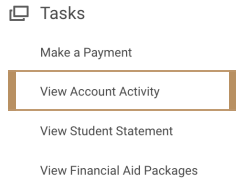


**Process to View Student Account Activity**

- From the homepage or from your Menu, select the **Finance for Third Party** app



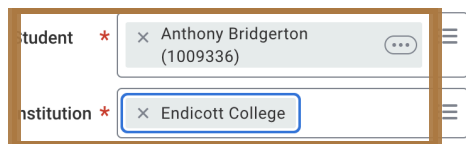
- The **Finance for Third Party** app will open. If permissions have been granted, you will be able to see **Make a Payment**, **View Account Activity**, **View Student Statement** and **View Financial Aid Packages**.



- Select **View Account Activity**. The prompt should default to your **Student's** name. If you have multiple Students, you can change the name by selecting the X and typing another Student name and selecting enter.

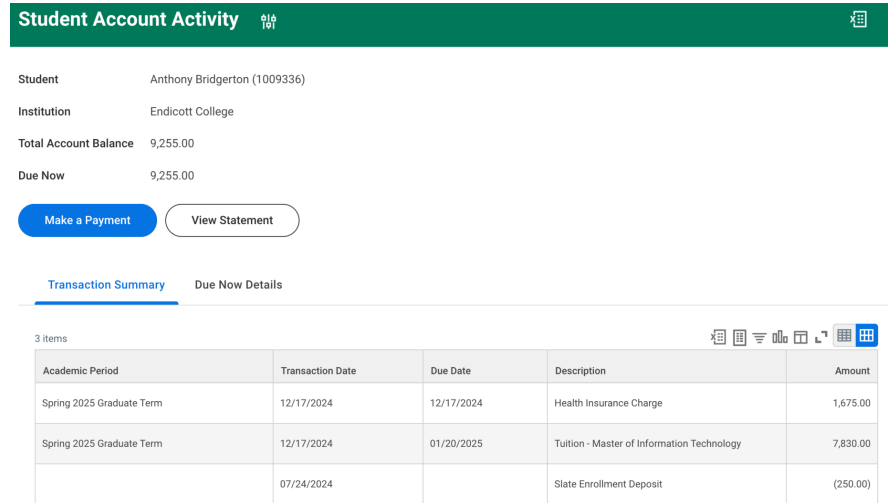
- For Institution, select **Endicott College** from the drop down then select **OK**.

**View Account Activity as Third Party**

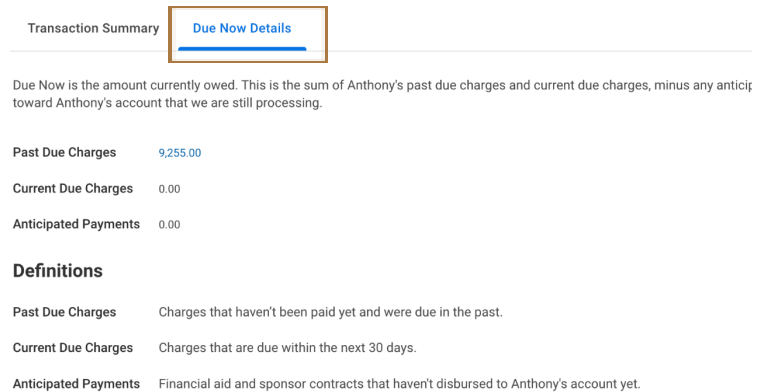


- On the Student Activity page, you will see the **Total Account Balance**, **Due Now** balance and a **Transaction Summary** by Academic Period. You can also **Make a Payment** (on external site) and **View the Student Financial Statement**.

**NOTE: the below images are generated for training purposes only and are not intended to be accurate.**



- To view more details on the balance due, select the **Due Now Details** tab.

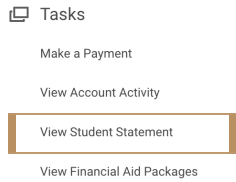


Process to View Student Financial Statement

15. From the homepage or from your Menu, select the **Finance for Third Party** app



16. The **Finance for Third Party** app will open. If permissions have been granted, you will be able to see **Make a Payment, View Account Activity, View Student Statement** and **View Financial Aid Packages**.



17. Select **View Student Statement**.

18. On the View Statement Statement as Third Party prompt, type or select the **Academic Period** you would like to view the statement for. Select **OK**.

View Student Statement as Third Party

19. The Student Financial Statement and details will open. You can review the details here, **Generate a PDF, View a Different Statement, or Make a Payment** (on external site) as well.

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20. Select **Generate PDF**. The report will run and will be sent to your Workday notifications to download. Select **Done**.

Print Student Statement as Third Party

21. In the top right corner of the browser, select the bell icon with the **notification**. This is alerting you the PDF has generated.

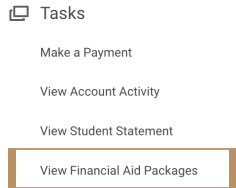
22. From the notifications list, you will see a **hyperlink** to the Statement PDF that you can download from here.

**Process to View Financial Aid Packages**

23. From the homepage or from your Menu, select the **Finance for Third Party** app



24. The **Finance for Third Party** app will open. If permissions have been granted, you will be able to see **Make a Payment, View Account Activity, View Student Statement** and **View Financial Aid Packages**.



25. Select **View Student Financial Aid Packages**. The prompt should default to your **Student's** name. If you have multiple Students, you can change the name by selecting the X and typing another Student name and selecting enter.

26. For Institution, select Endicott College.

27. Type or select the **Award Year** you would like to view the Financial Aid package for. Select **OK**.

**View Financial Aid as Third Party**

Student \*

Institution \*

Award Year \*

28. If a Student has been awarded Aid, the summary will be provided on this page. From here you can review **Estimated Financial Aid Summary, Award Year Summary by Academic Period, Awards Breakdowns, and Estimated Cost Summaries by Academic Period & Estimated Cost Breakdowns**

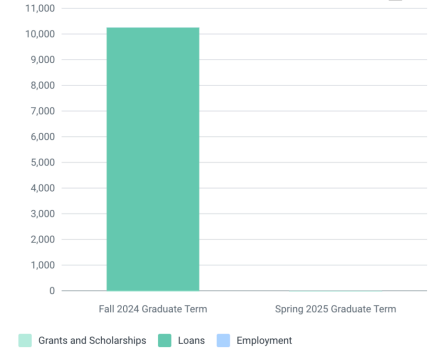
**NOTE: the below images are generated for training purposes only and are not intended to be accurate.**

**View Financial Aid as Third Party**

View Financial Aid 

**Estimated Financial Aid**






Grants and Scholarships	0.00
Loans	10,250.00
Employment	0.00
<b>Total Financial Aid</b>	<b>10,250.00</b>
<b>Total Estimated Costs</b>	<b>41,902.00</b>
Out of Pocket Without Loans	41,902.00
Out of Pocket With Loans	31,652.00



[Financial Aid Overview](#) | [Estimated Costs](#)

**2024-2025 Award Year Summary**

Total Amount Offered 20,500.00  
Total Amount Accepted 10,250.00

2 items     

Academic Period	Amount Offered	Amount Accepted
Fall 2024 Graduate Term	10,250.00	10,250.00
Spring 2025 Graduate Term	10,250.00	0.00