

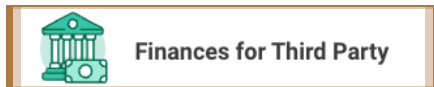
Students at Endicott College can grant access to a Friends & Family contact within Workday by setting up "Third Party Access." The Student will need to grant permissions for their Friends and Family contact in Workday. Access will vary based on granted permissions.

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.

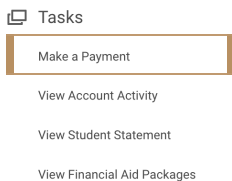
Process to Make a Payment (on external site)

1. Log-in to the Endicott Workday
<https://www.myworkday.com/wday/authgwy/endicott/login.html?redirect=n>

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



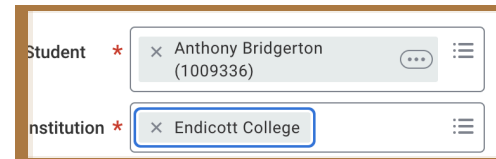
3. The **Finance for Third Party** app will open. If permissions have been granted, you will be able to see **Make a Payment**, **View Account Activity**, **View Student Statement** and **View Financial Aid Packages**.



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.**

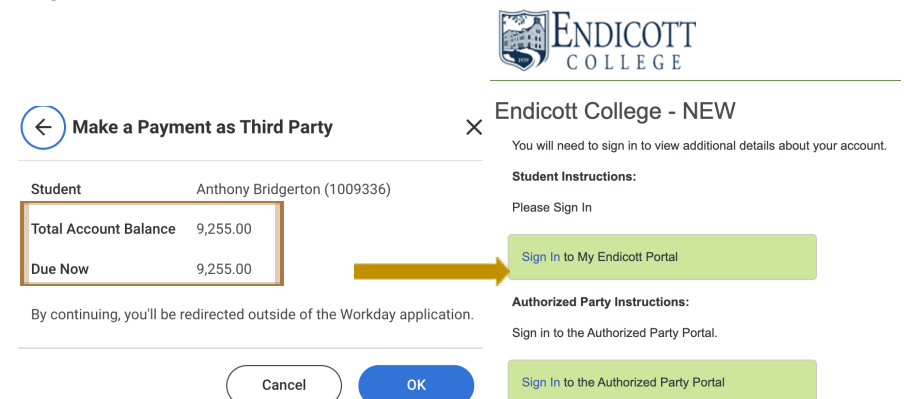
5. If you are paying on behalf of the student, the student must set up their account first and then add you as an Authorized Payer in Nelnet. If you have used Nelnet before, simply Sign In to manage your account.
6. Select **Make a Payment**. The prompt should default to your **Student's** name. If you have multiple Students, you can change the name by selecting the X and typing another Student name and selecting enter.
7. 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.

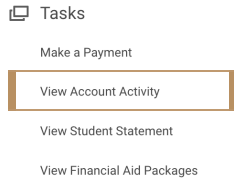


Process to View Student Account Activity

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



10. 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**.



11. 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.

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

View Account Activity as Third Party

13. 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.

Academic Period	Transaction Date	Due Date	Description	Amount
Spring 2025 Graduate Term	12/17/2024	12/17/2024	Health Insurance Charge	1,675.00
Spring 2025 Graduate Term	12/17/2024	01/20/2025	Tuition - Master of Information Technology	7,830.00
	07/24/2024		State Enrollment Deposit	(250.00)

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

Due Now is the amount currently owed. This is the sum of Anthony's past due charges and current due charges, minus any anticipated toward Anthony's account that we are still processing.

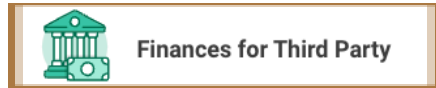
Category	Amount
Past Due Charges	9,255.00
Current Due Charges	0.00
Anticipated Payments	0.00

Definitions

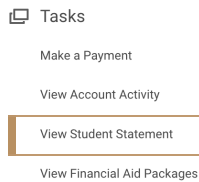
Category	Description
Past Due Charges	Charges that haven't been paid yet and were due in the past.
Current Due Charges	Charges that are due within the next 30 days.
Anticipated Payments	Financial aid and sponsor contracts that haven't disbursed to Anthony's account yet.

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

Student * Anthony Bridgerton (1009336)

Institution * Endicott College

Academic Period * Spring 2025 Graduate Term

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.

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

View Student Statement as Third Party

Student	Anthony Bridgerton (1009336)	Date Range	(01/21/2025-05/11/2025)
Student ID	1009336	Anticipated Due	9,255.00
Academic Period	Spring 2025 Graduate Term	Charges	9,505.00
Academic Level	Graduate	Applied Payments	250.00
		Anticipated Payments	0.00
		Refunds	0.00

Institution Endicott College

[Generate PDF](#) [View a Different Statement](#) [Make a Payment](#)

Charges - 2 Items

Date	Charge	Amount
12/17/2024	Tuition - Master of Information Technology	7,830.00
12/17/2024	Health Insurance Charge	1,675.00

Applied Payments - 1 Item

Date	Payment	Payment Amount	Applied Amount
07/24/2024	State Enrollment Deposit	250.00	250.00

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

Student Anthony Bridgerton (1009336)

Message Your statement PDF is being generated. Please check your Workday notification to download it.



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.

Notifications

Viewing: All Sort By: Newest From Last 30 Days

Document Available

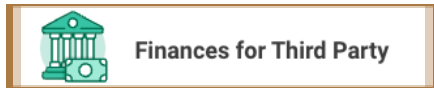
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Student Statement: Anthony Bridgerton (1009336) - Spring 2025 Graduate Term.pdf is now available in My Reports

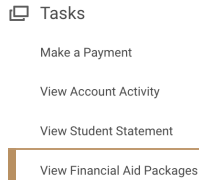
[Details](#) [Student Statement: Anthony Bridgerton \(1009336\) - Spring 2025 Graduate Term.pdf](#)

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**

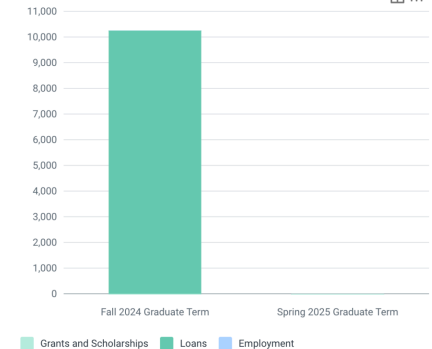
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View Financial Aid as Third Party

View Financial Aid

Estimated Financial Aid

Grants and Scholarships	0.00
Loans	10,250.00
Employment	0.00
Total Financial Aid	10,250.00
Total Estimated Costs	41,902.00
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