

This Quick Reference Guide (QRG) supports friends and family in checking their student's account balance and making payments.



**Note:** Students must take *two* actions for third parties, i.e., friends and family, to get access to view their account balance and make payments.

First, students must grant permission to the third party in Workday to access their records, including viewing financial information.

Next, students must invite the third party to access their Transact payment accounts so that third parties can make payments on behalf of their student.

For step-by-step support in performing these actions, see the quick reference guides in the [Access for Friends and Family \(Third Party\)](#) section of the *Workday Training Materials for Students* website.

Once both steps are completed, third parties are ready to begin making payments to their student's account.

To check a student's account balance and make a payment on a student's account, complete the following steps.

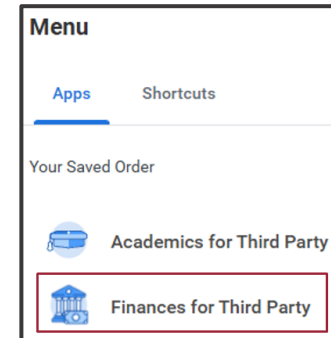
## VIEW STUDENT ACCOUNT BALANCE IN WORKDAY

To view your student's account balance in Workday, follow the steps below.

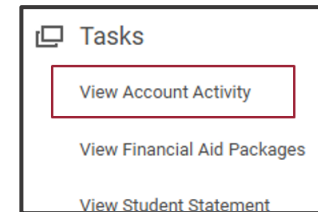
1. Using the credentials associated with your Workday account, log in to Workday at:

<https://wd5.myworkday.com/wday/authgwy/uasys/login.html?redirect=n>

2. From the Workday Home page, click the **Global Navigation Menu** in the top left corner of the screen, then select **Finances for Third Party**.



3. To view your student's *Transaction Summary*, click **View Account Activity** within the *Tasks* section.

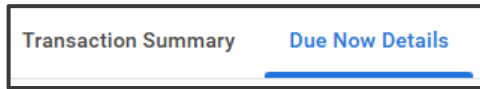


4. Select your student's **Institution**.
5. Click **OK**.

The *Student Account Activity* screen displays your student's *Transaction Summary* tab.

You can view charges and payments at a line-item level within the table.

To view the amount that is currently due, click to display the **Due Now Details** tab.



*Due Now* is the amount your student currently owes the institution. It is the sum of the student's past due and current due charges, minus any anticipated payments. It does not include payments made toward the student's account that your institution is still processing.

This tab also displays your student's Past Due Charges, Current Due Charges, and Anticipated Payments.

Past Due Charges	0.00
Current Due Charges	1,526.90
Anticipated Payments	0.00

- To view your student's most recent statement, click the **View Statement** button.
- Select the **Academic Period** associated with the statement you wish to view (typically, you will select the most recent period).
- Click **OK**.

From this page, you can see the student's Charges, Anticipated Payments, and Courses displayed for the academic period you selected.

## MAKE A PAYMENT TO STUDENT ACCOUNT IN TRANSACT

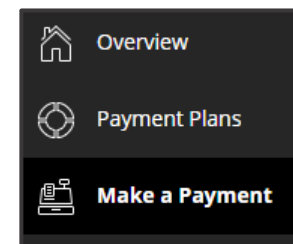
To make a payment to your student's account balance in Transact, follow the steps below from the *Finances for Third Party* screen in Workday:

- Select the name of the institution you will make a payment to.

Please select from the below links to make a payment on behalf of the Student.

The *eCommerce Payment System* login screen displays.

- Type your Transact **User Name** and **Password** credentials.
- Click the **Sign In** button. You may see a 'Sign in with <your institution name>' button that you can also select.
- Click **Make a Payment** from the left menu.



- Select one or more academic periods for which you will make a payment.

6. Enter the amount(s) you will pay today in the **Amount** field(s) for the academic period(s) you selected.

Description	Balance	Amount
<input checked="" type="checkbox"/> Fall_2025	\$1,526.90	<input type="text" value="\$1,526.90"/>

7. Click **Checkout** in the bottom right corner of the screen.
8. Select the **Payment method**, entering information in the corresponding fields as needed, and saving the account information for future use if desired.

\* Payment method

My Visa (\*\*\*\*1111) **VISA**

New credit or debit card

New bank account

9. Click **Continue** in the bottom right corner of the screen.
- The *Service fee* screen displays.

**Note:** Service fee amounts vary by payment method.

10. Check the box for the service fee acknowledgement.

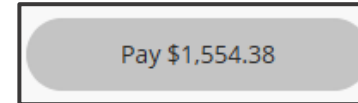
Service fee  
**\$27.48**

As part of your payment, you will be charged a service fee of **\$27.48**.

I understand that my transaction includes a non-refundable service fee of **\$27.48**.

11. Click **Continue** in the bottom right corner of the screen.

12. Verify that all payment details (including a valid **Email address** have been entered, then click **Pay** in the bottom right corner of the screen.



**Note:** The 'Pay' amount reflects the total payment, including both the service fee and the payment to your student's institution.

The *Thank You* screen displays your total payment amount and remaining balance.

The receipt is emailed automatically to the email address you provided.

13. Click **Go to overview** in the bottom right corner of the screen.
14. Notice that your student's balance has been reduced by the payment amount (not counting service fees).