Third Party & Student Financials: How to Check My Student's Account Balance and Make a Payment (Nelnet)

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

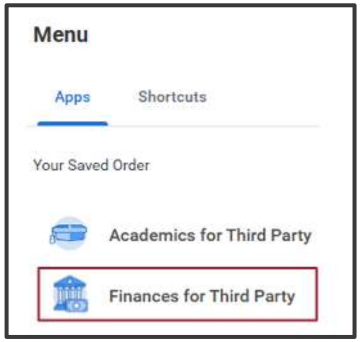
> Note: Students must take *two* actions for third parties, i.e., friends and family, to get access to view their account balance and make payments.
>
> First, students must grant permission to the third party in Workday to access their records, including viewing financial information.
>
> Next, students must invite the third party to access their Nelnet 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 your student's account balance and make a payment on their account, complete the following steps.

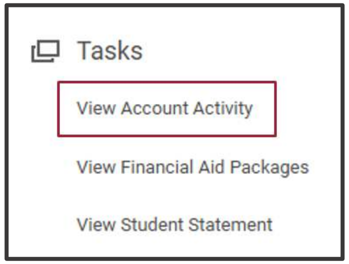
VIEW STUDENT ACCOUNT BALANCE IN WORKDAY

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.htmld?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.



> Note: To view only the account details presented within the student's statement, you can click **View Statement**, select the **Academic Period** associated with the statement you wish to view, then click **OK**.

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.

   Transaction Summary | Due Now Details

   Due Now is the amount your student currently owes the institution. It is the sum of the student's past due charges 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	9,514.35
Current Due Charges	0.00
Anticipated Payments	4,125.00

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

To make a payment to your student's account balance in Nelnet, follow the steps below.

From the *Finances for Third Party* screen in Workday:

1. Click to 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 *Nelnet* login screen displays.

9. Click to **Sign In** to the Authorized Party Portal.

   Authorized Party Instructions:

   Sign in to the Authorized Party Portal.

   Sign In to the Authorized Party Portal

10. Type your **Username or Email** and **Password** in

the fields provided.

Your login credentials are emailed to you after your student adds you as an Authorized Party.

11. Click the **Sign In** button.

12. Make the payment in Nelnet.