Workday Student
Reference Guide

LSU is working to modernize the software that supports our daily transactions. This reference guide provides step-by-step instructions on how to view your bill, make a payment, enroll in a payment plan, and more!

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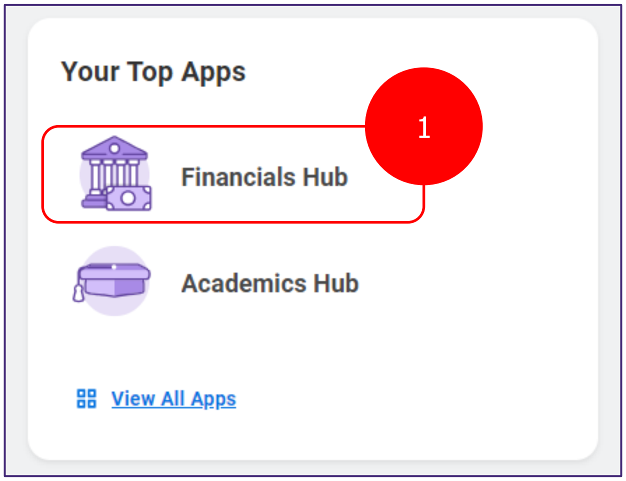
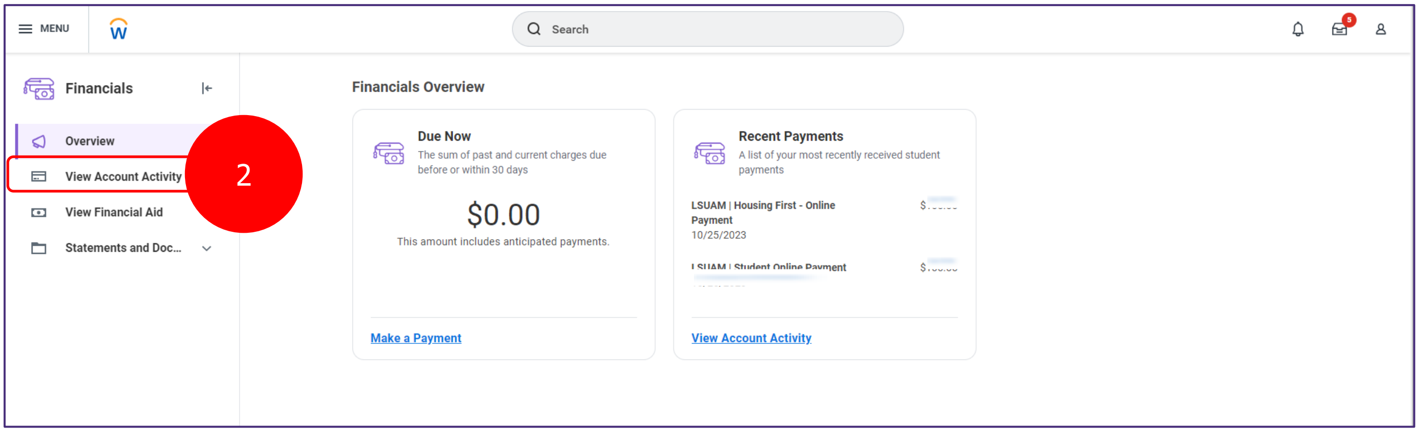
View Bill

View account details and the outstanding student balance/bill.

1. On the Workday home page, navigate to Your Top Apps and click the **Financials Hub** icon.

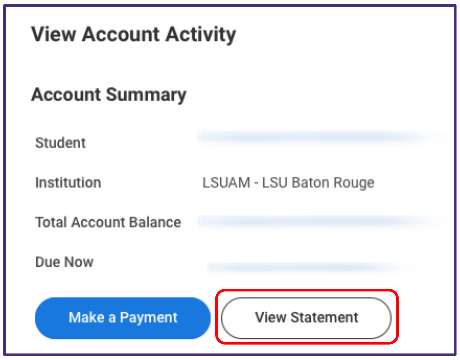
2. In the navigation menu under Financials, click **View Account Activity**.





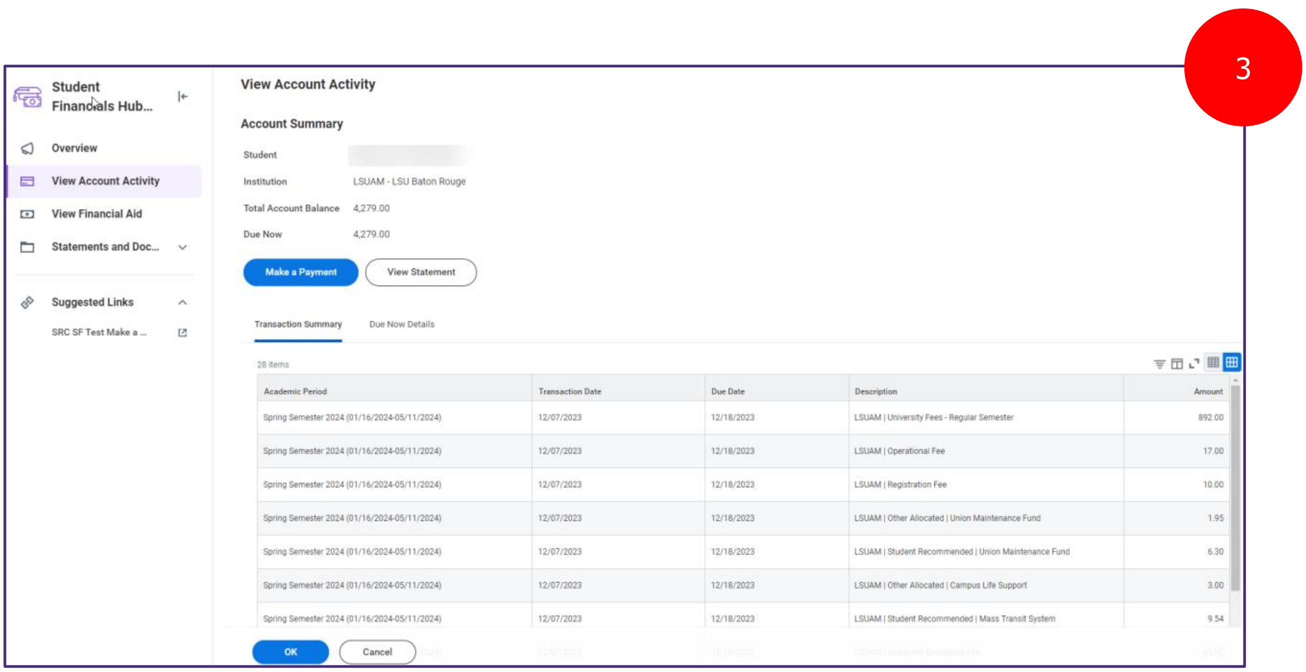
Helpful Hint:

Click **View Statement** if you need to view or download term-specific charges (e.g., Fall 2024 bill).



View Bill (continued)

3. The table contains charges to your account. The table includes:
    - **Academic Period**: The term the charge is billed for.
    - **Transaction Date**: Date the charge was posted to your account.
    - **Due Date:** Date the charge is due to be paid.
    - **Description**: The description of the charge.
    - **Amount**: The amount of the charge.



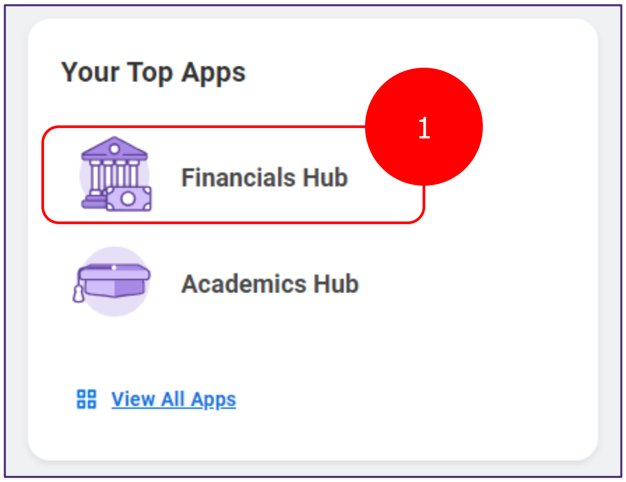
Helpful Hint:

Add filters to the list of charges by clicking on the column headers in the transaction history table displayed above.

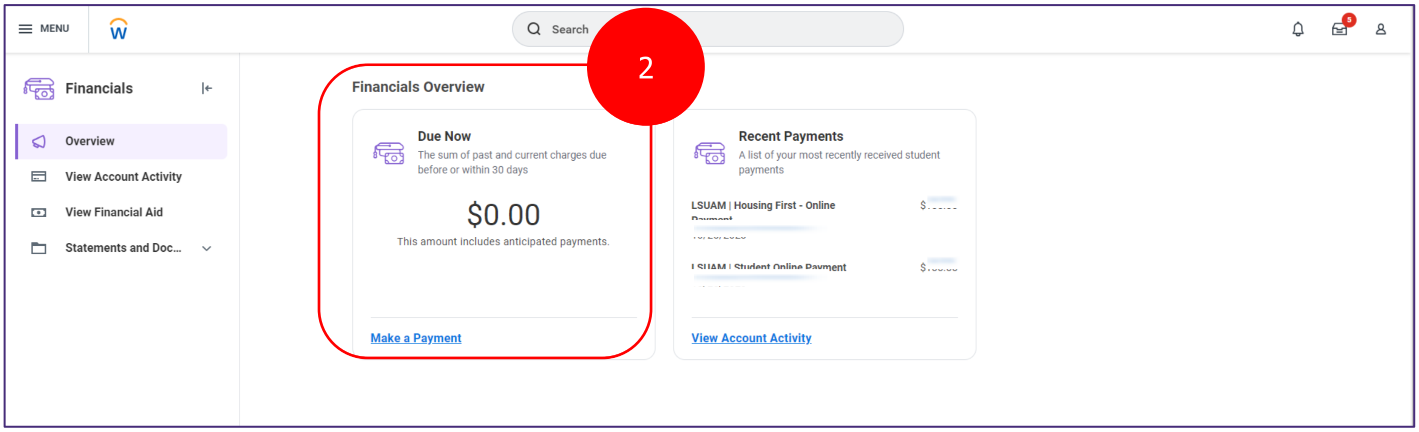
Pay Bill

Make a payment towards the outstanding student bill. Payments are processed immediately.

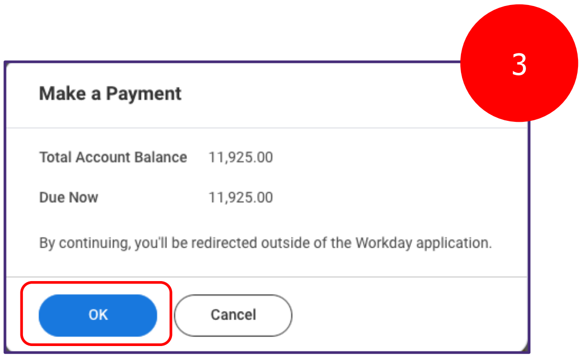
1. On the Workday home page, navigate to Your Top Apps and click the **Financials Hub** icon.



2. In the center of Financials Overview, click **Make a Payment.**



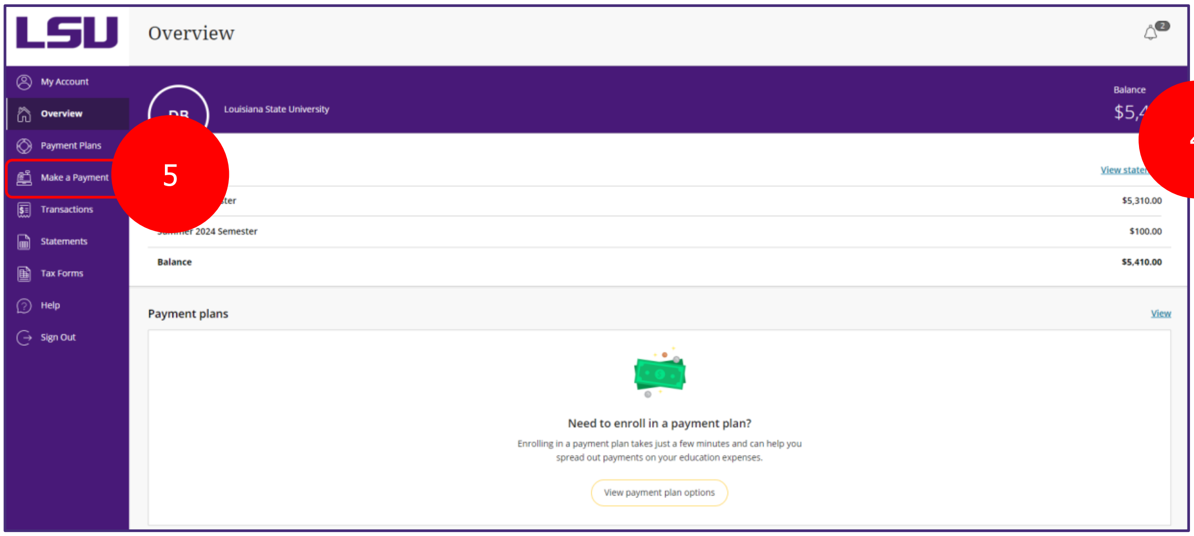
3. Click **OK** in the Make a Payment pop-up window to be redirected to Transact.
   - Note: ensure your account is up-to-date prior to clicking OK to open Transact.



Pay Bill (continued)

4. On the Transact overview screen, review any outstanding balances you have. Balances are grouped by term.

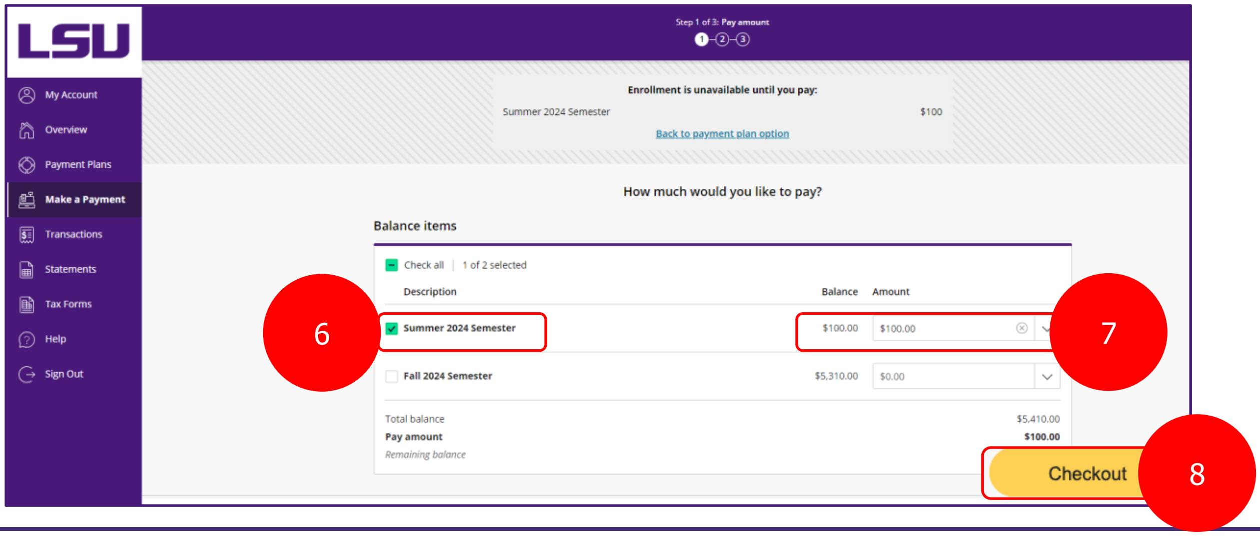
5. Click **Make a Payment** from the navigation menu.



6. Select the checkbox on the line(s) you wish to make a payment for.

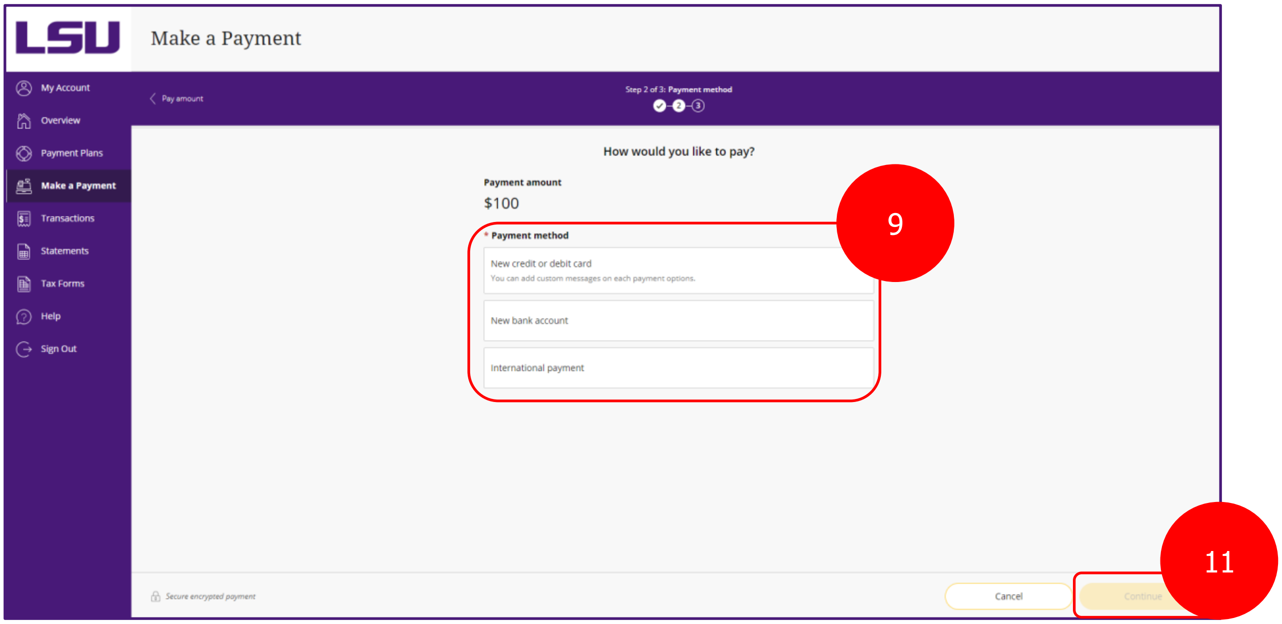
7. The payment amount will default to the entire amount. Change the payment amount if desired.

8. Click **Checkout.**



Pay Bill (continued)

9. Select a payment method from the list of available options.
   - Note: all online payments will incur a service fee.
10. Enter payment details for the selected payment method.
11. Click **Continue.**

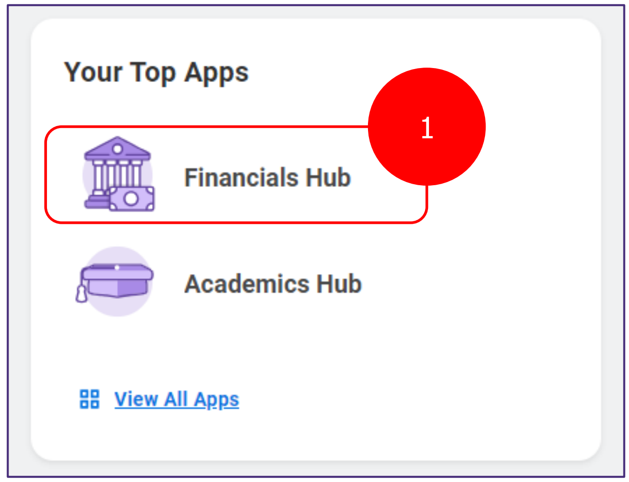


12. Select the checkbox to acknowledge the **Terms and Conditions**.
13. Click **Continue.**
14. The payment is processed and a receipt and transaction number are provided for confirmation purposes.

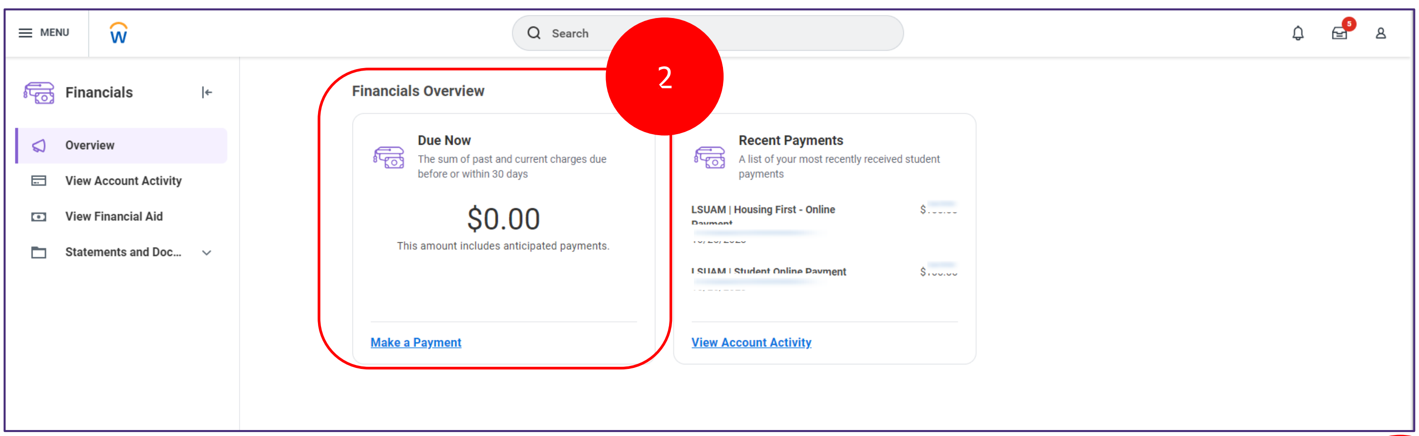
Setup Payment Plan

Setup a payment plan for an outstanding balance. Only certain terms may be available for a payment plan. Past due balances must be paid off to setup a payment plan.

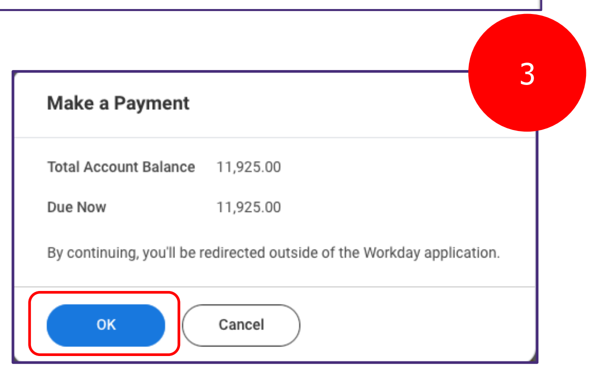
1. On the Workday home page, navigate to Your Top Apps and click the **Financials Hub** icon.



2. In the center of Financials Overview, click **Make a Payment** to be redirected to the payment portal.



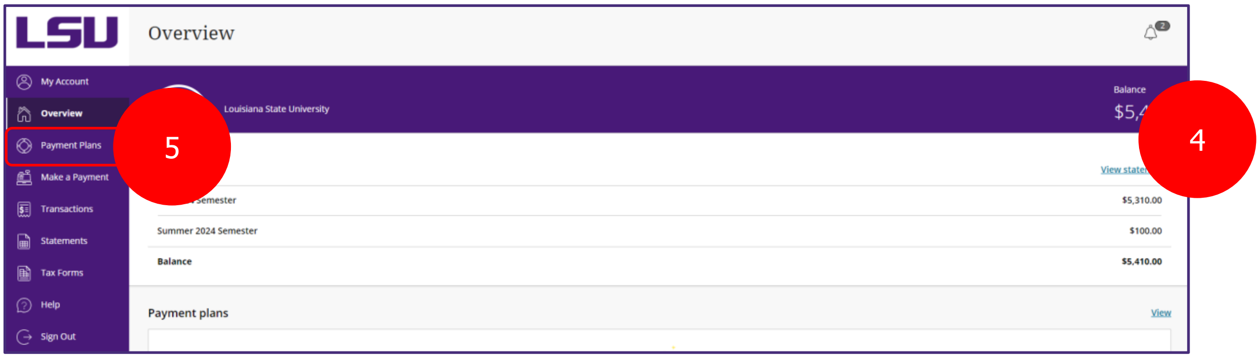
3. Click **OK** in the Make a Payment pop-up window to be redirected to Transact.



Setup Payment Plan (continued)

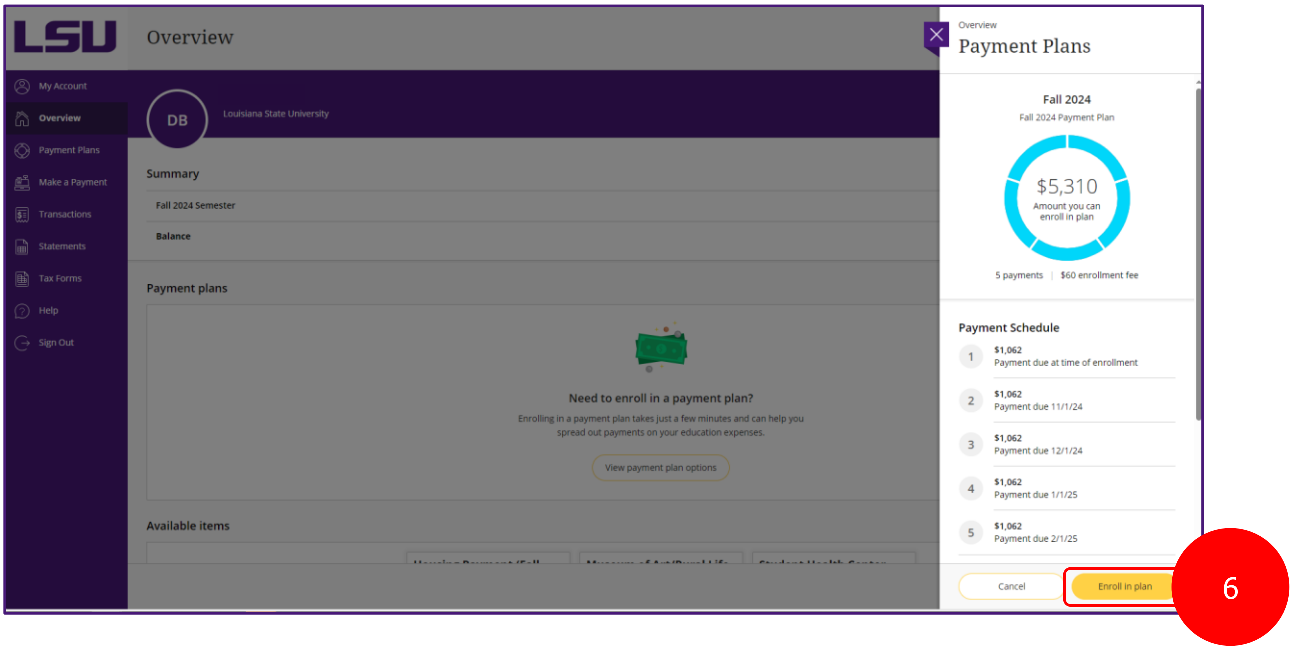
4. On the Transact overview screen, review any outstanding balances you have. Balances are grouped by term.

5. Click **Payment Plans** from the navigation menu.



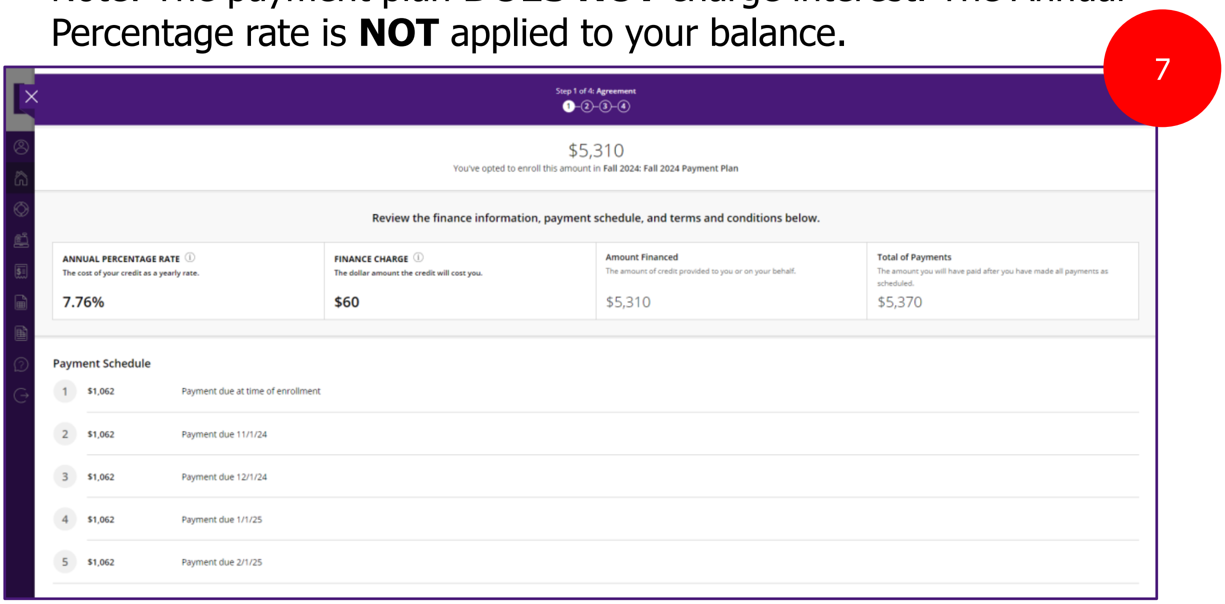
6. Click **Enroll in Plan.**

   - If this is your first time using a payment plan, click **Accept** on the eSignature disclosure pop-up.



Setup Payment Plan (continued)

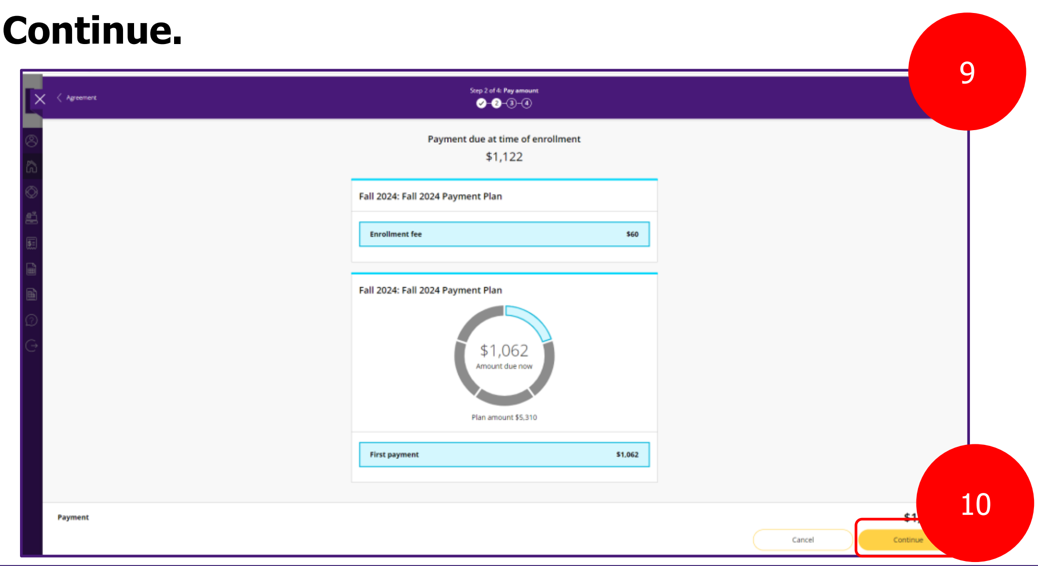
7. Review the agreement, containing payment plan due dates, amounts and charges.
   - Note: The payment plan **DOES NOT** charge interest. The Annual Percentage rate is **NOT** applied to your balance.



8. Enter your initials in the prompt and click **Continue.**

9. Review the enrollment fee and first payment amount.

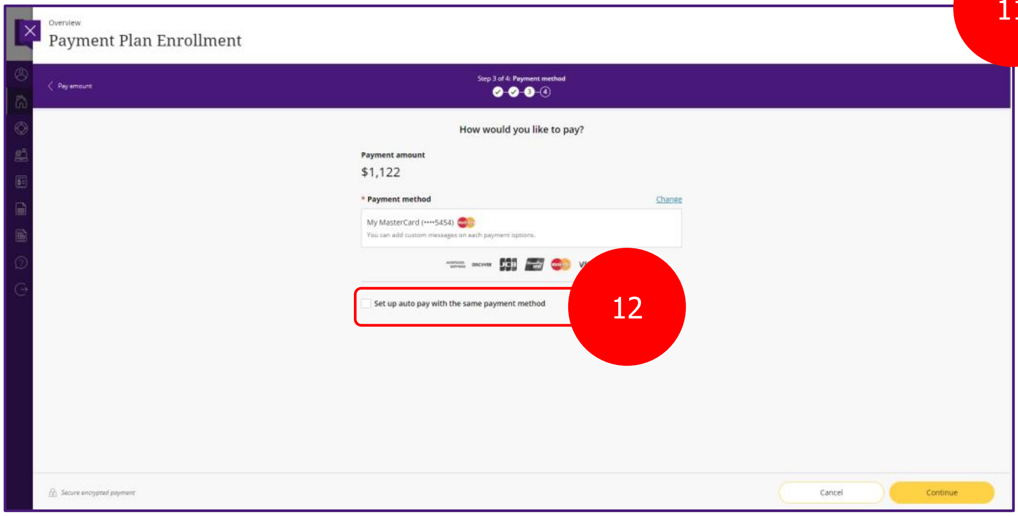
10. Click **Continue.**



Setup Payment Plan (continued)

11. Select a payment method and enter payment details.

12. To use this payment for automatic payments of future balances due, check the **setup auto-pay** checkbox (Optional).
    - Note: If you do not setup auto-pay, you will need to return to Transact to make future payments by the due date.



13. Click the checkbox to acknowledge the terms and conditions for auto-pay, if selected (Optional).

14. Click the checkbox to acknowledge any service fee.

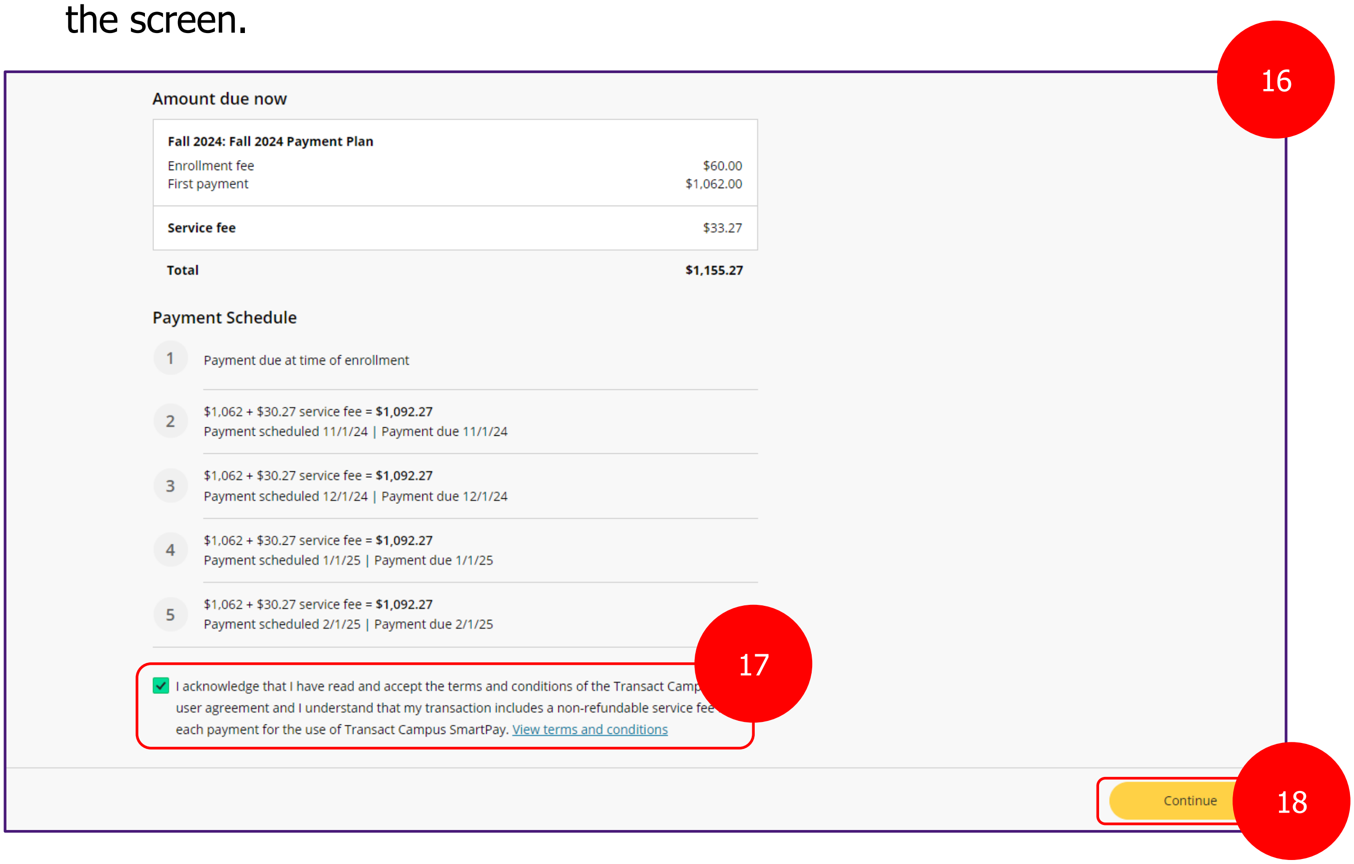
15. Click **Continue.**

Helpful Hint:

You must pay off any previous term balances before enrolling in a current or future term's payment plan.

Setup Payment Plan (continued)

16. Review the Amount due now and Payment Schedule.
17. Click the checkbox to acknowledge the terms and conditions.
18. Click **Continue** to submit the first payment.
19. A confirmation of enrollment and receipt of the first payment is displayed on the screen.



Helpful Hint:

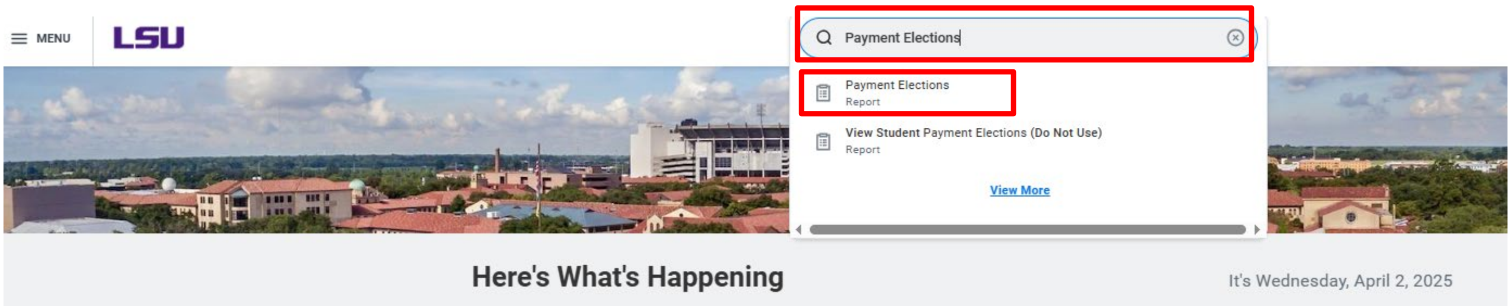
The screenshot above illustrates scheduled payments and fees based on credit card auto-pay. Your screen may be different based on the plan's payment method.

ADD DIRECT DEPOSIT ACCOUNT INFORMATION

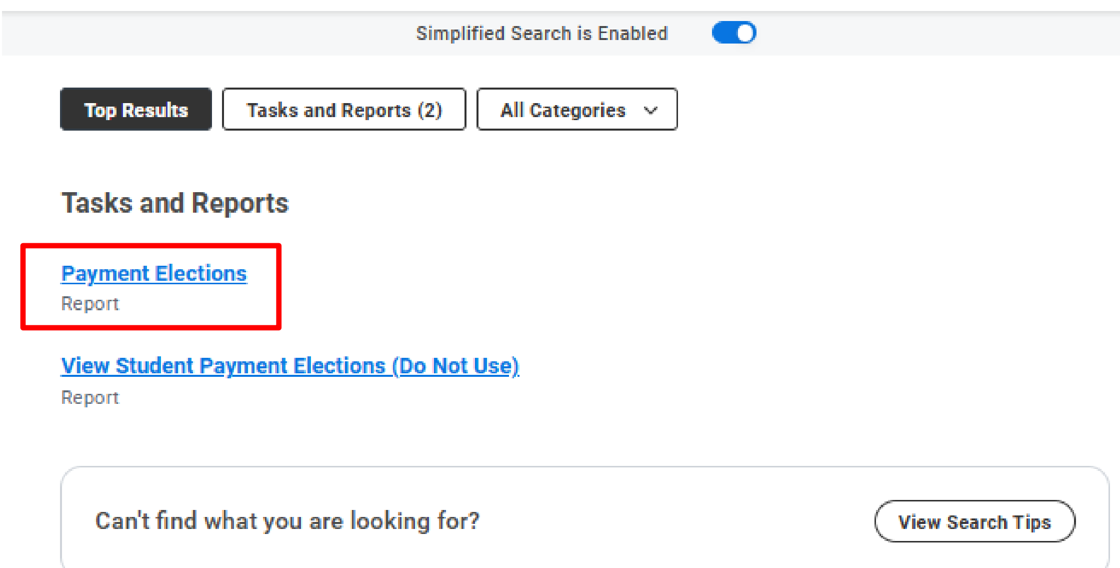
Setting up a Payment Election involves first setting up bank accounts for direct deposit

From the Search Bar:

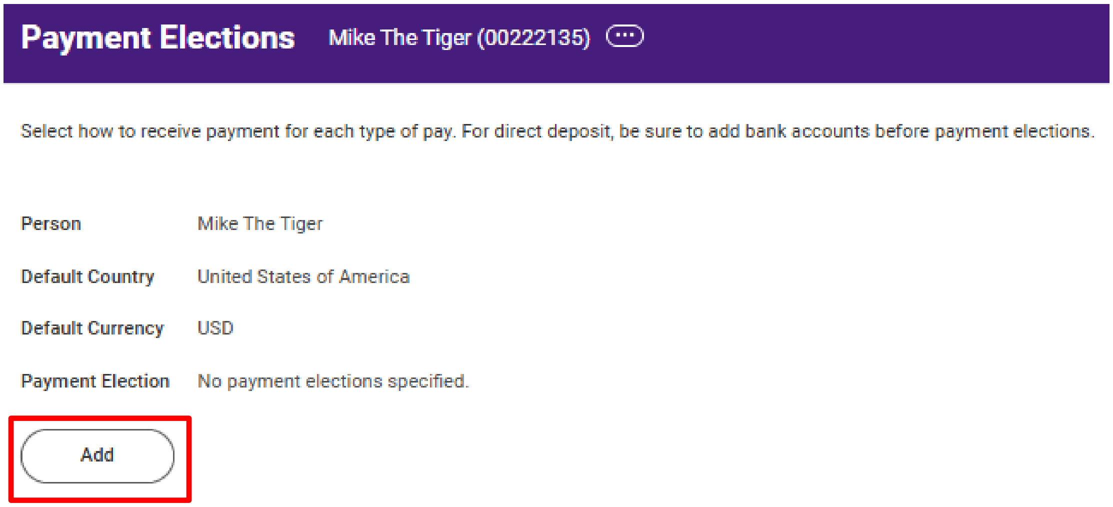
1. Type “Payment Elections”.
    a. Click the suggested “Payment Elections” report or hit Enter

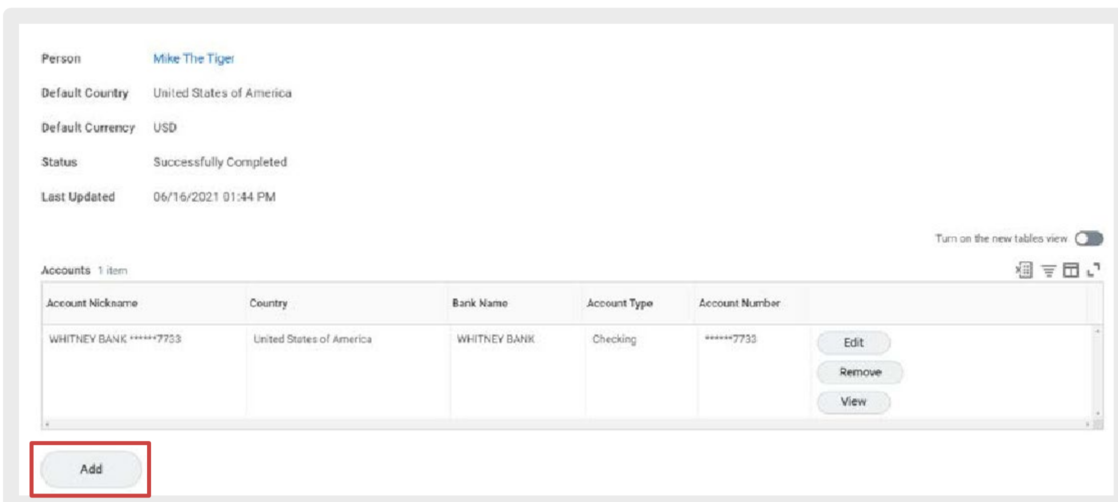


    b. If you hit Enter above, select “Payment Elections” report in the list of “Tasks and Reports”

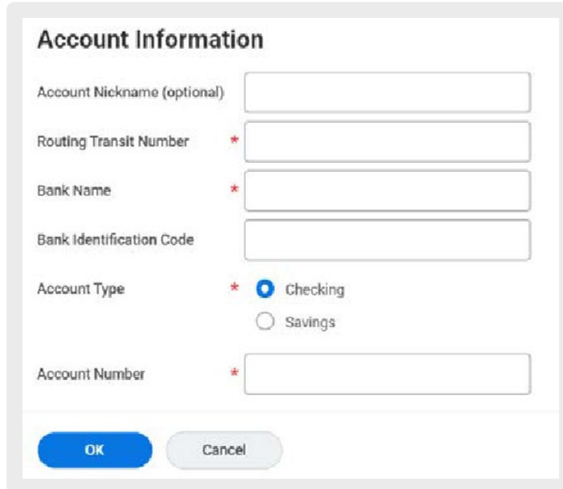


2. In the Accounts section, click the Add button to add an account.





3. Complete the Account Information.
    a. Add a Nickname to help identify the account (optional).
    b. Enter the Routing Transit Number, Bank Name, and Account Number.
    c. Select the Account Type (Checking or Savings).
    d. Optionally, you can enter a Bank Identification Code.
4. Click OK to save. Once the account has been added, the account can be used to make payment elections.

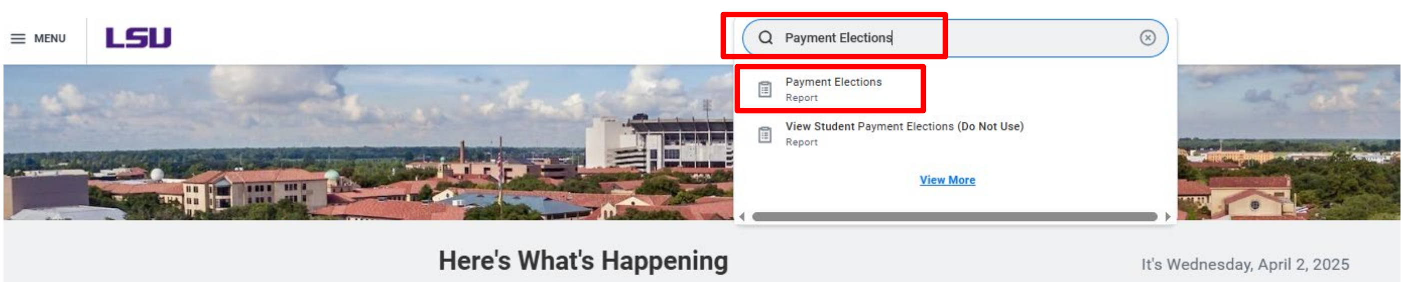


Keep in mind that students may only enter one bank account for each Payment Election type.

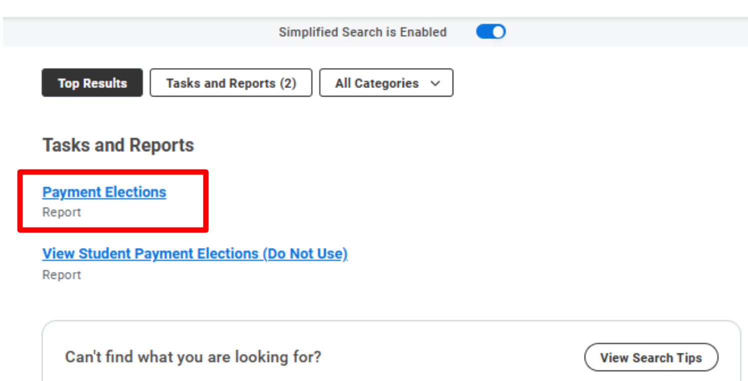
CHANGE DIRECT DEPOSIT ACCOUNT INFORMATION

From the Search Bar:

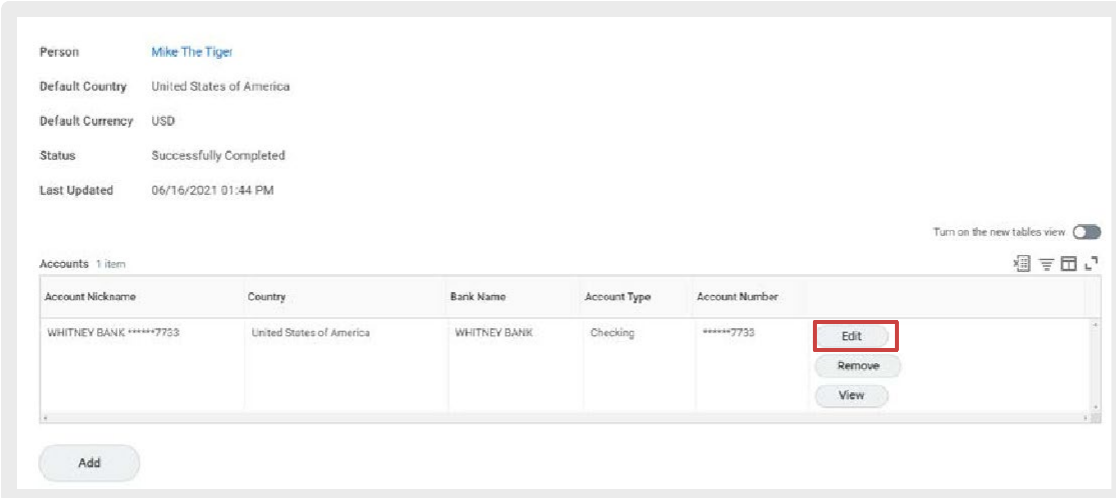
1. Type “Payment Elections”.
    a. Click the suggested “Payment Elections” report or hit Enter



    b. If you hit Enter above, select “Payment Elections” report in the list of “Tasks and Reports”

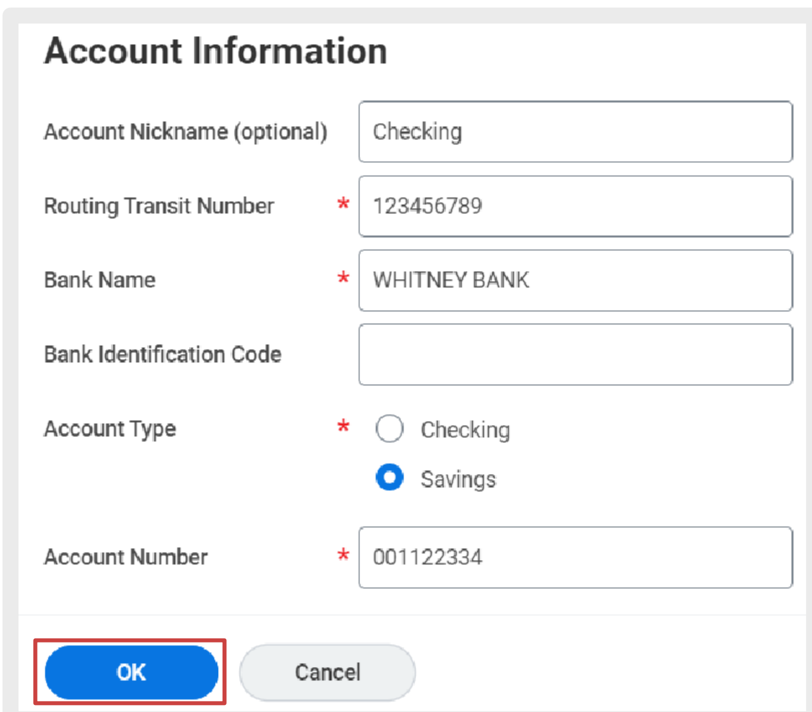


2. In the Accounts section, click the appropriate Edit button to update the account information.



3. Change the appropriate Account Information.

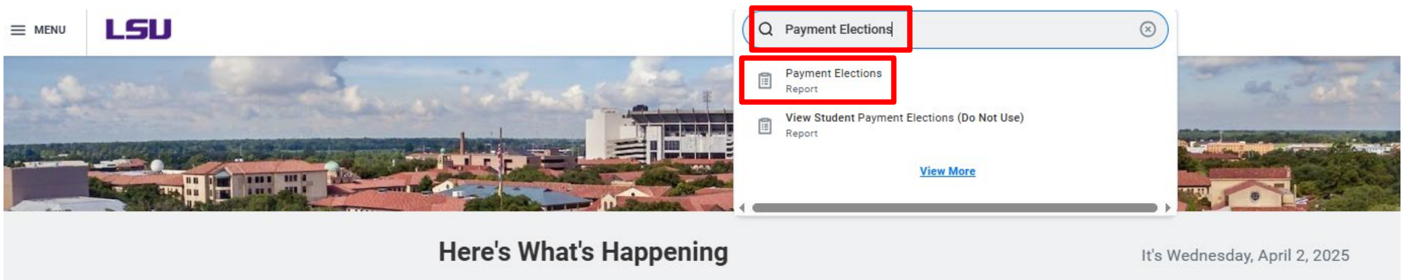
4. Click OK to save. When changing account information, all payment elections that use the account are updated automatically. Note: When a new student enters a bank account for the first time, Workday selects that account for Student Refund Payment and Expense Payment by default.



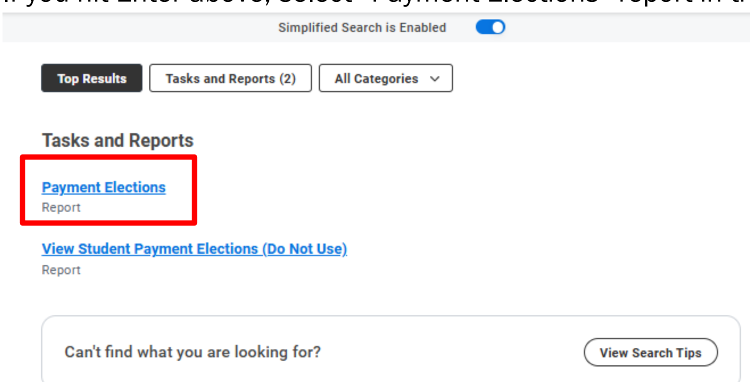
ADD or EDIT PAYMENT ELECTION

From the Search Bar:

1. Type “Payment Elections”.
   a. Click the suggested “Payment Elections” report or hit Enter



   b. If you hit Enter above, select “Payment Elections” report in the list of “Tasks and Reports”



2. In the Payment Elections section, click the EDIT icon next to Student Refund Payment to change the election/account or next to Expense Payment to change the election/account.

   a. Expense Payment – Any expense reimbursement payments you receive are deposited into the bank account designated for Expense Payments. You may add one (1) bank account to deposit your Expense Payments.

   b. Student Refund – Any Student Refund payments you receive are deposited into the bank account designated for Student Refunds. In addition to the 1 Expense Payment account, you may add one (1) entirely different bank account to deposit your Student Refund.

Payment Elections 2 items

	Payment Elections				
Pay Type	Payment Type	Account	Account Number	Distribution	Action
Expense Payment	Direct Deposit	Test Bank ******3456	******3456	Balance Yes	Edit
Student Refund Payment	Direct Deposit	Test Bank ******4565	******4565	Balance Yes	Edit

3. Your exiting elections will prepopulate. Enter the following required fields:

   c. In the Country box, click the prompt and select the United States of America (LSU deposits funds only into banks residing in the United States, and, therefore, United States of America is the only option available).

   d. The Currency will auto default to USD.

   e. Under Payment Type, click the prompt and select Direct Deposit.

   f. In the Account field, click the prompt and select the appropriate Bank Account.

Pay Type	Student Refund Payment
Person	Mike The Tiger
Default Country	United States of America
Default Currency	USD
Number of Elections Allowed	1

Payment Elections 1 item

	Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
		United States of America	USD	Direct Deposit	Test Bank ******4565	Balance

4. Click OK to save your changes.

5. You should now see the new distribution added to your Payment Elections.

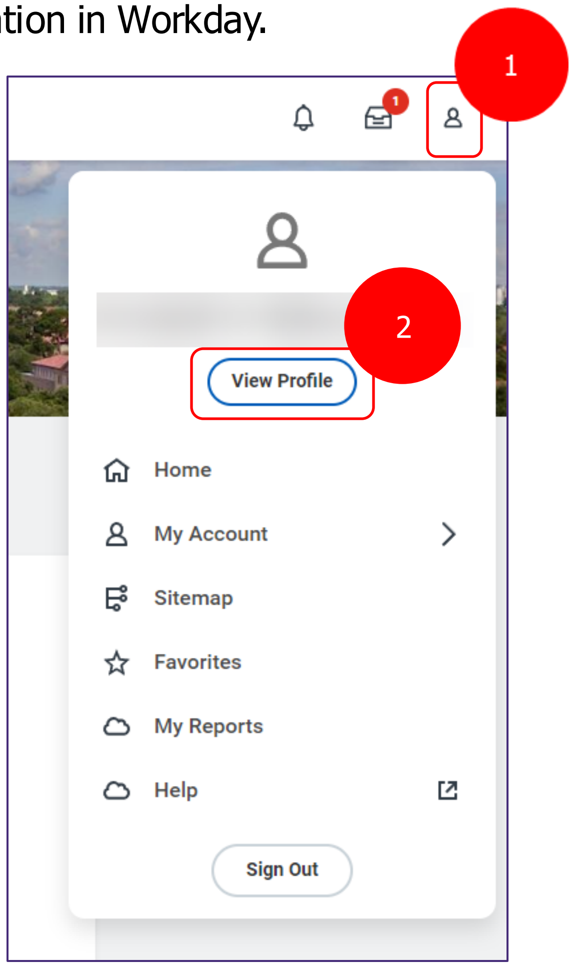
Payment Elections 2 items

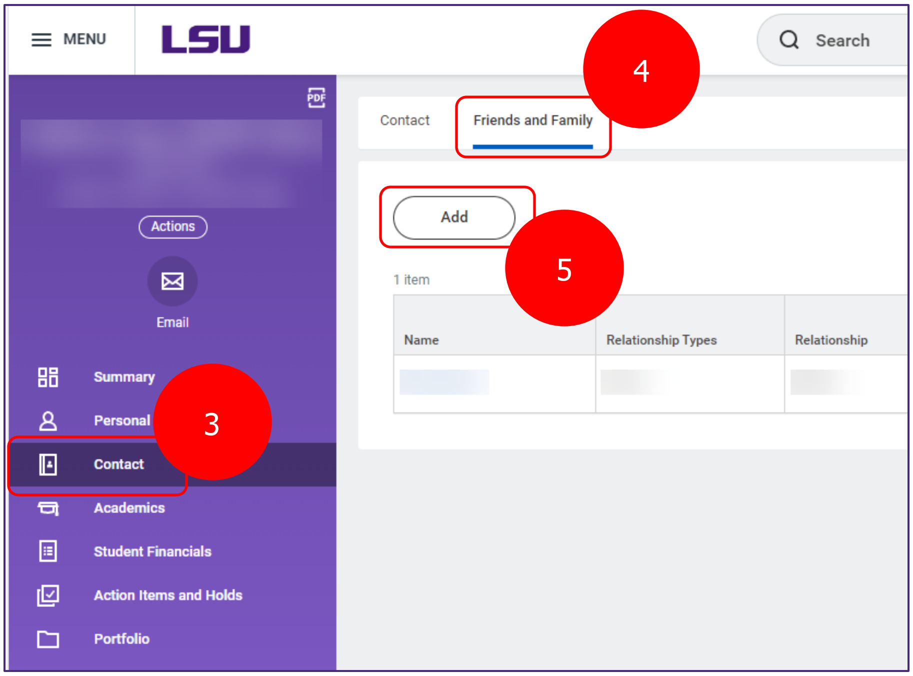
	Payment Elections				
Pay Type	Payment Type	Account	Account Number	Distribution	Action
Expense Payment	Direct Deposit	Test Bank ******3456	******3456	Balance Yes	Edit
Student Refund Payment	Direct Deposit	Test Bank ******4565	******4565	Balance Yes	Edit

Adding & Editing Friends and Family Contacts

Students can add and edit third party contact information in Workday.

1. On the Workday home page, click the **Profile** icon.
2. Click **View Profile.**
3. Click **Contact**.
4. Once in the **Contact** section, click **Friends and Family**.
5. To add contacts, click **Add** on the top of the **Friends and Family** section.



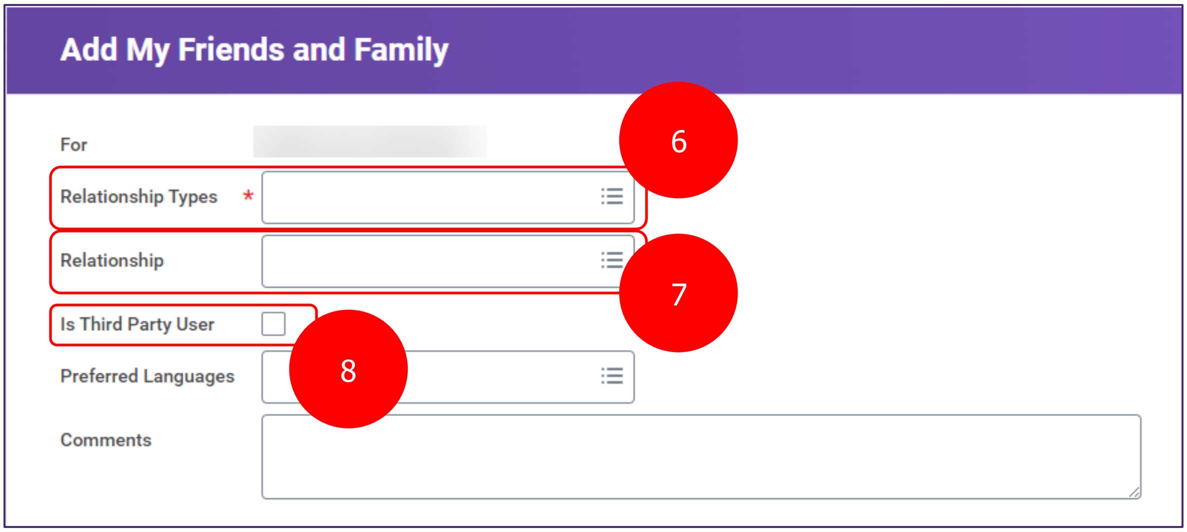


Adding & Editing Friends and Family Contact (cont.)

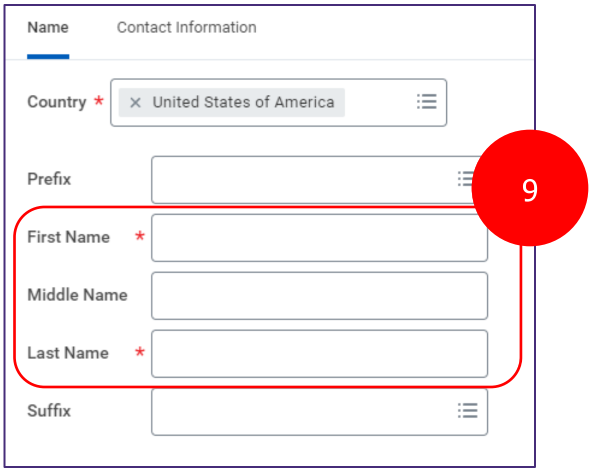
6. Select the **Relationship Types** and make the appropriate selections from the **drop down**.

7. Select the **Relationship** and specify the relation from **drop down**.

8. Mark **Is Third Party User** checkbox to assign contact as a Third Party User. Third Party Users may be granted the permission to view or complete tasks on a student's behalf.



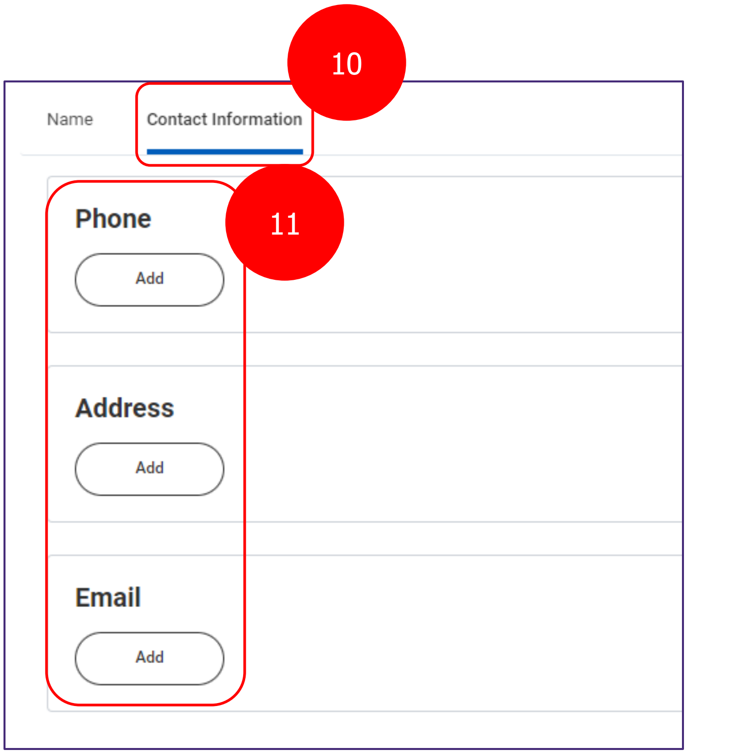
9. Complete Contact Name details.



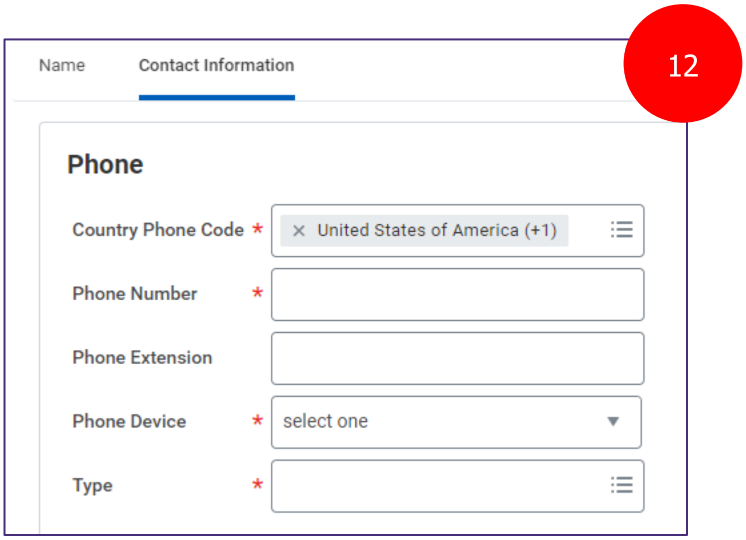
Adding & Editing Friends and Family Contact (cont.)

10. Click **Contact Information**.

11. Click **Add** for each type of contact modality.

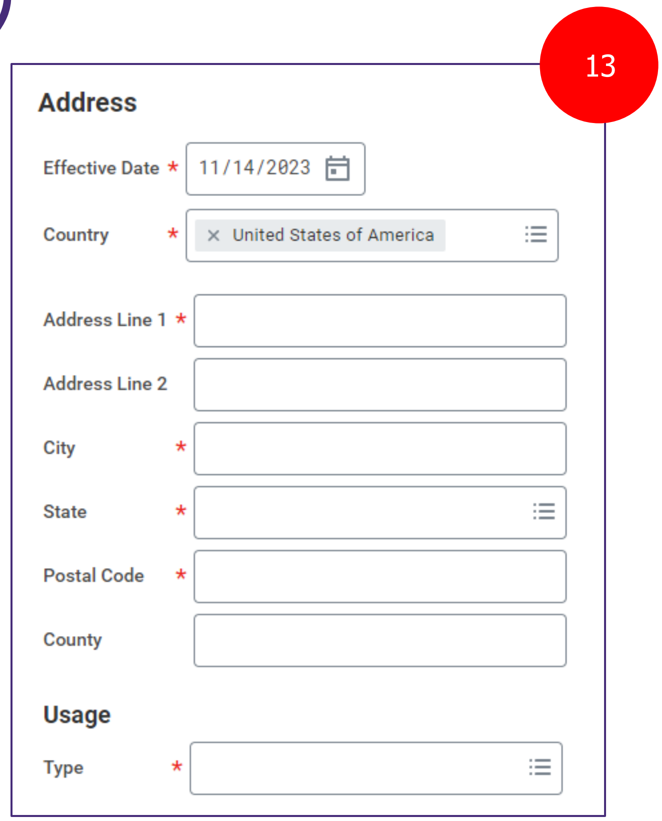


12. Under **Phone,** enter Phone Number, Phone Device, and Type.

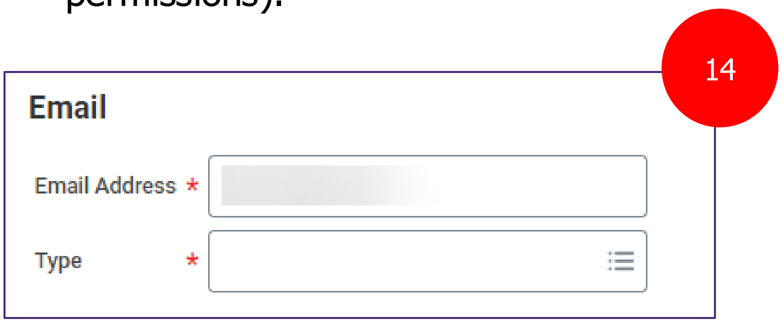


Adding & Editing Friends and Family Contact (cont.)

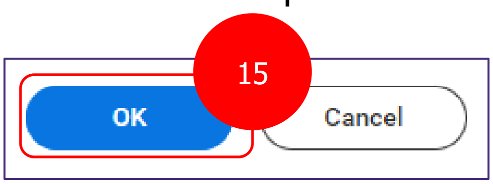
13. Under **Address,** enter the Effective Date, Address, and Type.



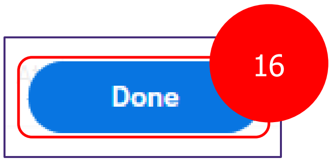
14. Under **Email,** enter Email Address and Type (required for third party permissions).



15. Click **OK** to complete the form.



16. Click **Done** to exit task.



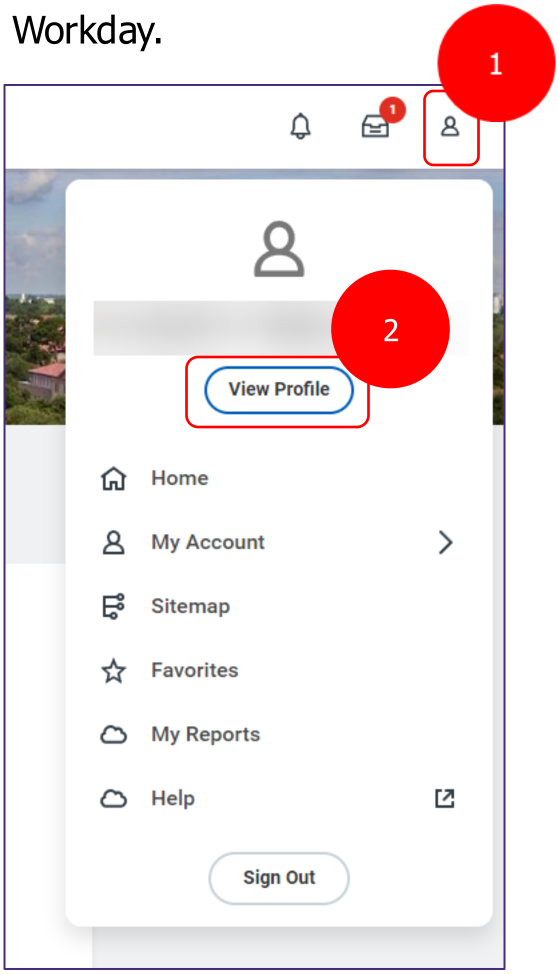
Helpful Hint:

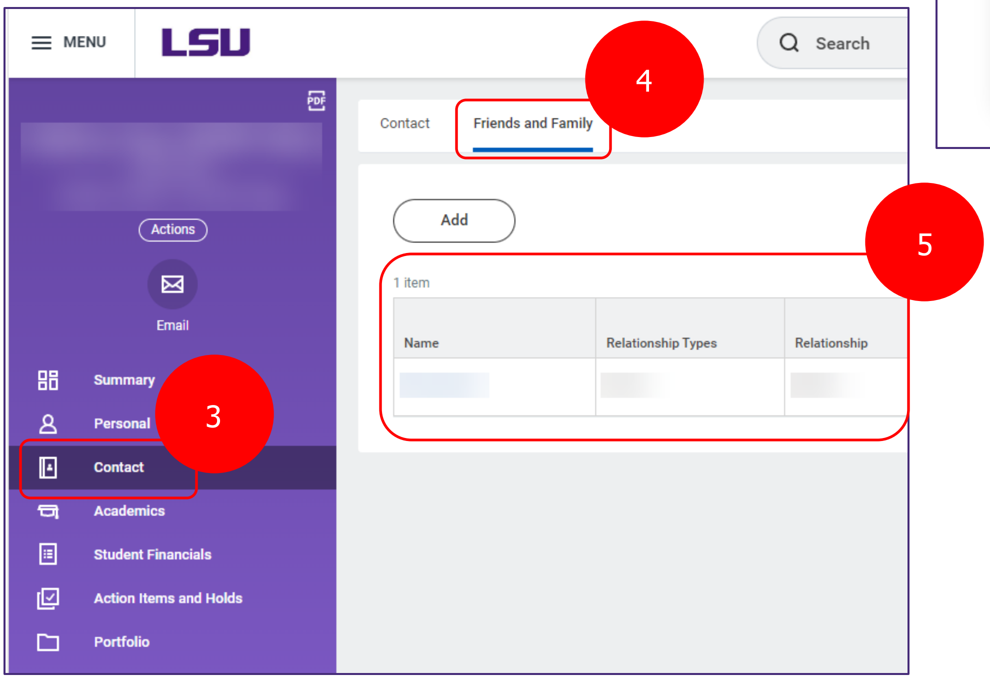
To Delegate Third Party Permissions to a contact, you must enter an email address. It is important to enter a phone number & address as well, especially if the person is your emergency contact.

Managing Third Party Permissions

Students can manage third party access permissions in Workday.

1. On the Workday home page, click the **Profile** icon.
2. Click **View Profile.**
3. Click **Contact**.
4. Once in the **Contact** section, click **Friends and Family**.
5. View Contacts in the **Friends and Family** tab.

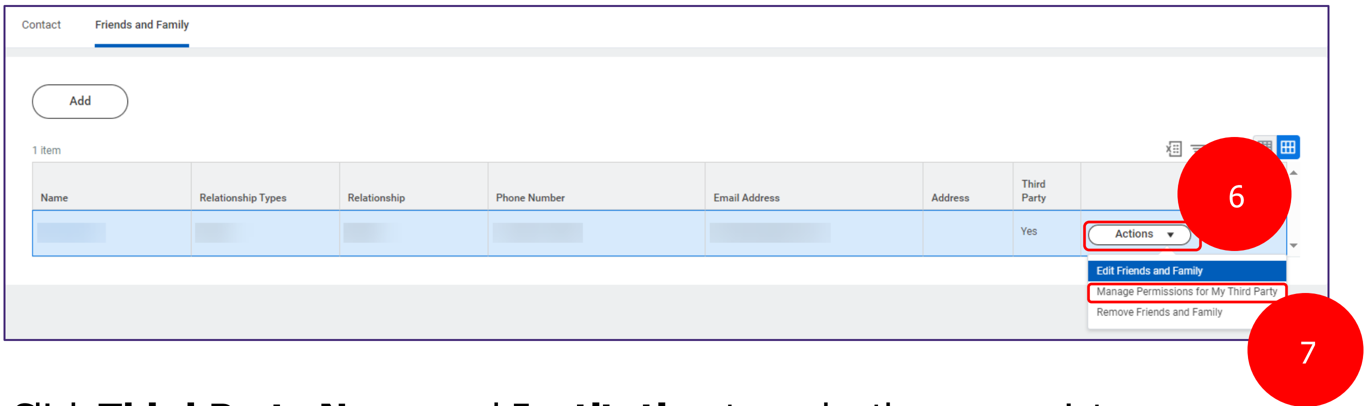




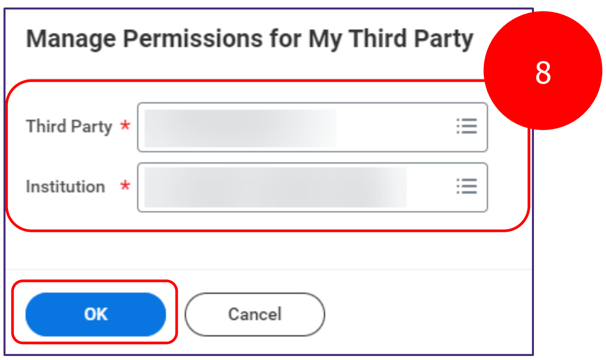
Managing Third Party Permissions (cont.)

6. Click **Actions** for relevant contact.

7. Select **Manage Permissions for My Third Party**.



8. Click **Third Party Name** and **Institution** to make the appropriate selections from the **drop down,** then click **OK**.



9. Review Permission Types and Descriptions:

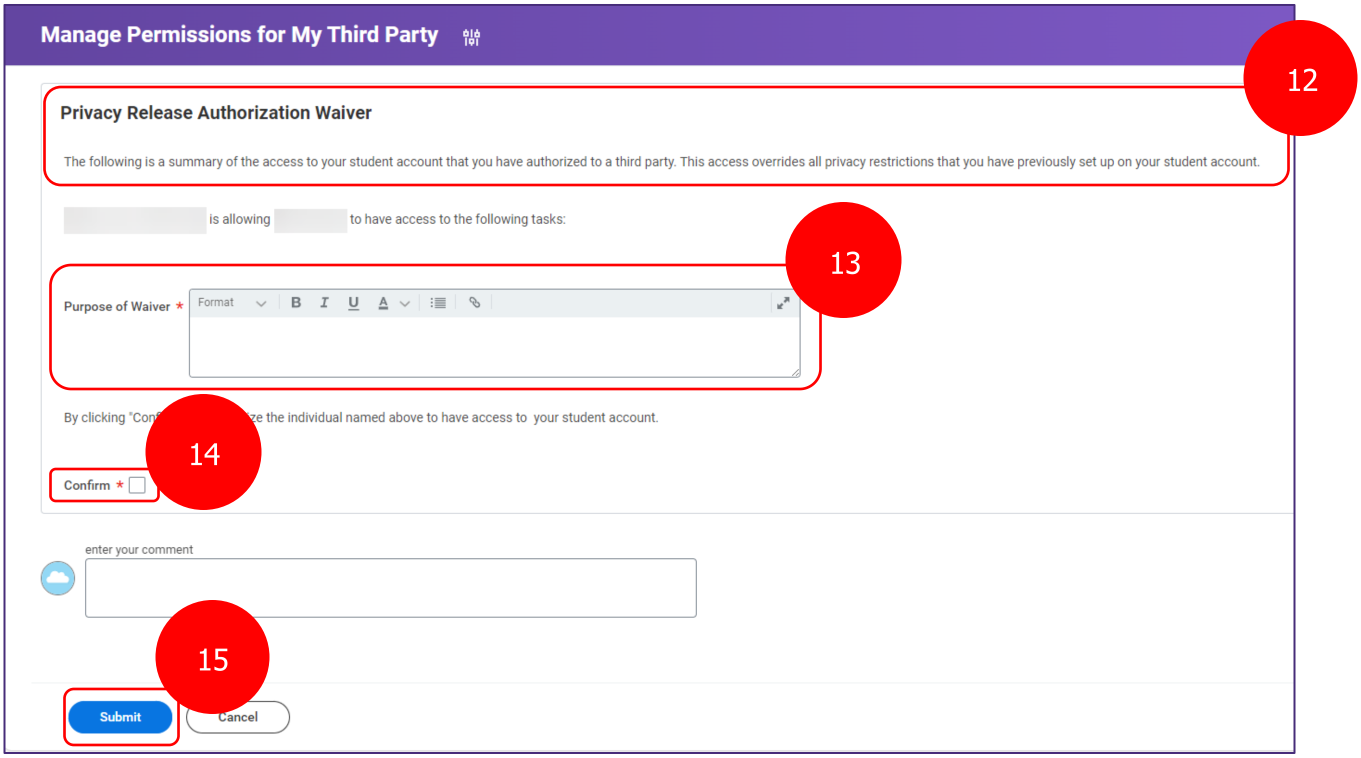
   - Make a Payment, View Financial Aid Package, View Account Activity, View Student Statement, View Current Classes, View Student Grades, and Generate Unofficial Transcript.

10. Mark the desired **Allowed** Checkbox(es) for any or all these Permission Types.

11. Click **OK**.

Managing Third Party Permissions (cont.)

12. Review the **Privacy Release Authorization Waiver** & **Third-Party Authorization**.
13. Enter the **Purpose of Waiver** description. (Sample statement: "I authorize this request")
14. Click the **Confirm** checkbox.
15. Click **Submit**.



Helpful Hint:

Delegating Third-Party Permissions is a two-step process. First, you must assign contacts as Third-Party User, then you can manage their permissions. This allows the Third-Party User to perform actions on your behalf.

Managing Third Party Permissions (cont.)

- *How will my Third-Party contact login to Workday?*
  - The Third-Party user will receive two emails from Workday when granted Third-Party access by their student. The first email includes the login link and login details, while the second email contains the password.
  - Using the provided link and login credentials, they will enter a version of the Workday homepage, offering access to only specific functions they've been authorized to use, such as viewing student grades.
  - Contact the **ITS Service Desk** (servicedesk@lsu.edu) for assistance in resolving any technical issues related to Third-Party access.

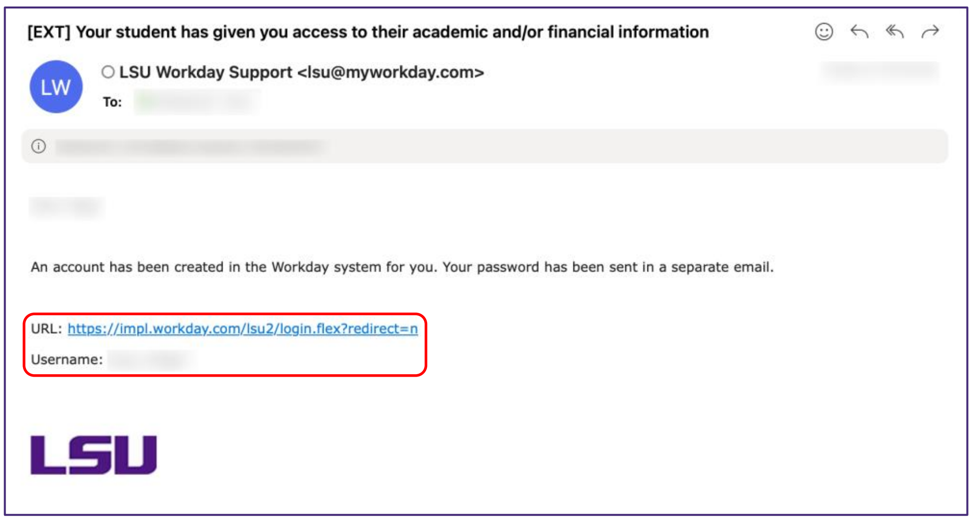
Third-Party Proxy Access Information

Discover how to set up your Workday account as a third party to access your student's information, set your permanent password, and find out what you need to do if you forget your login details.

Workday Account Setup:

After your student grants your third-party proxy access, you will receive your Workday username and temporary password in two separate emails. Note: Be sure to save your username. If you misplace your username, your student will have to regrant your access and you will have to set up your account again.

Email 1:


[EXT] Your student has given you access to their academic and/or financial information

LW LSU Workday Support <lsu@myworkday.com>

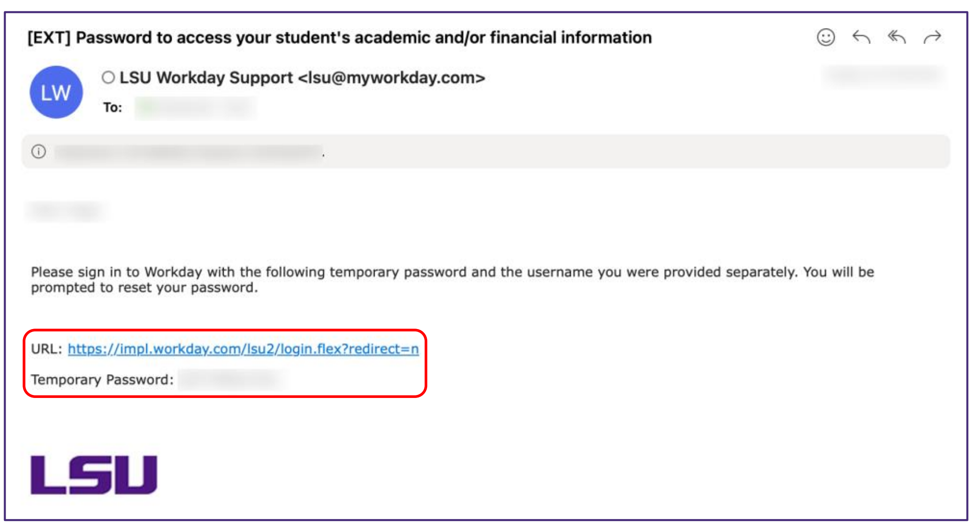
To:

An account has been created in the Workday system for you. Your password has been sent in a separate email.

URL: https://impl.workday.com/lsu2/login.flex?redirect=n

Username:

Email 2:


[EXT] Password to access your student's academic and/or financial information

LW LSU Workday Support <lsu@myworkday.com>

To:

Please sign in to Workday with the following temporary password and the username you were provided separately. You will be prompted to reset your password.

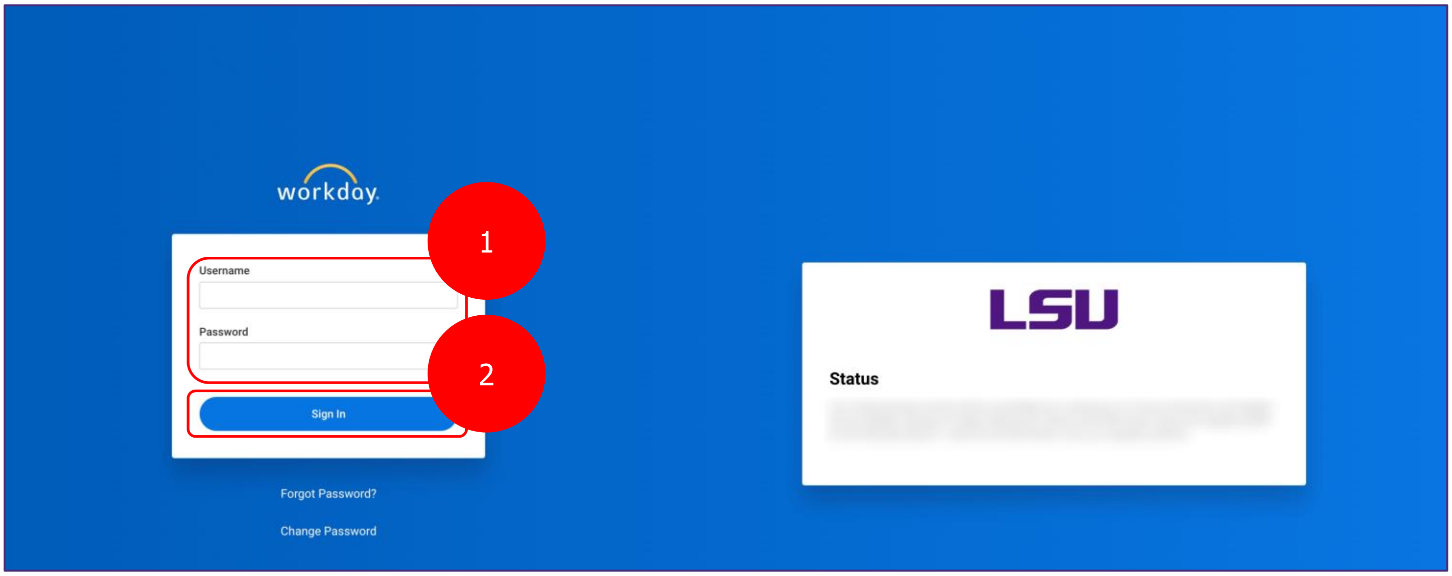
URL: https://impl.workday.com/lsu2/login.flex?redirect=n

Temporary Password:

Third-Party Proxy Access Information (continued)

1. Once you receive the emails containing your username and temporary password, use the provided Workday URL to access the Workday Student third-party access site. Enter your **Username** and **Temporary Password** to log in.

2. Click **Sign In**.

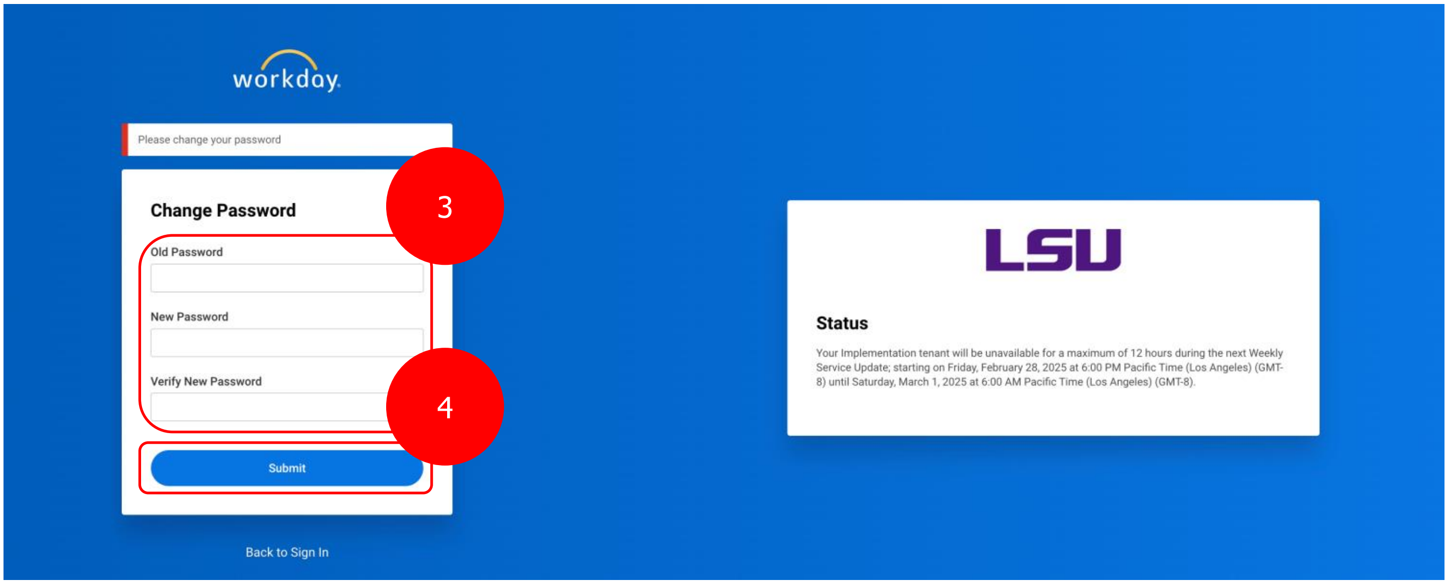


3. You will be prompted to change your password. Enter your old (temporary) password, then your new password, and then confirm the new password.

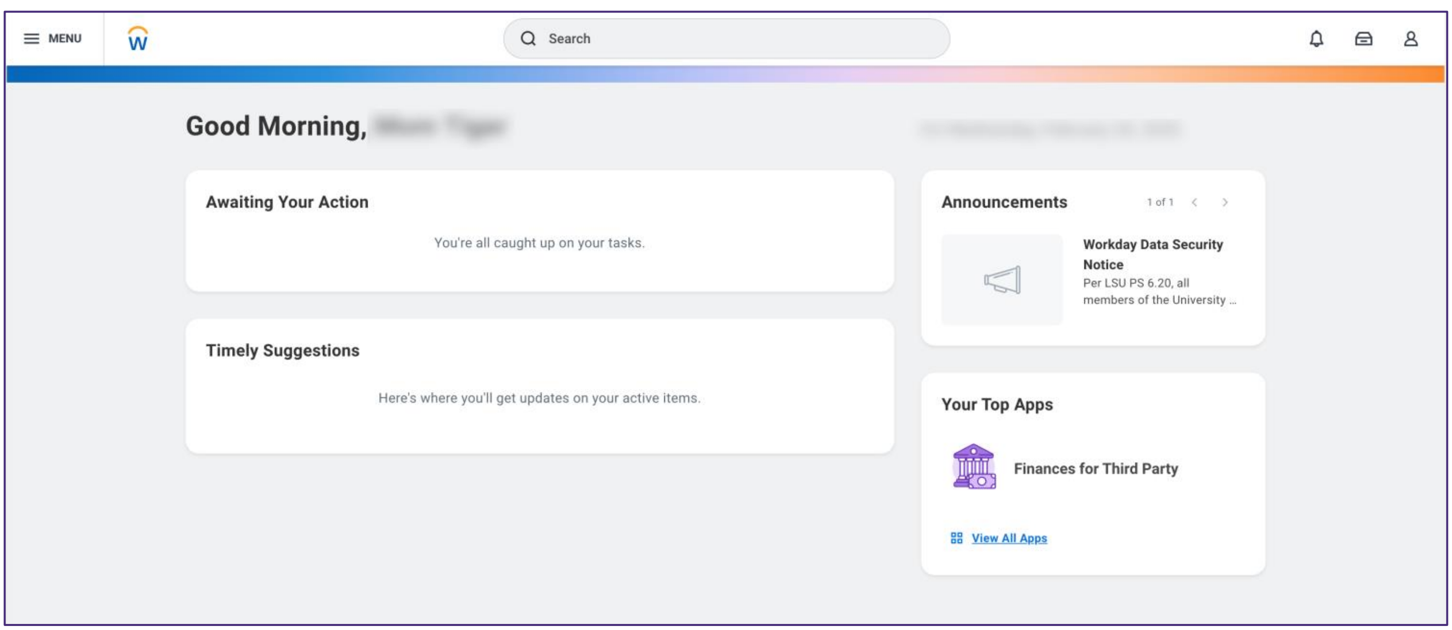
   - Password Criteria: Your new password must not be the same as your current password or username.
     - Minimum number of characters required: 12
     - Following character types must be represented: alphabetic characters, uppercase characters, lowercase characters, Arabic numerals 0-9, special characters !"#$%&'()*+,-.?:;+>/@{|}^_[\}.
     - The password must not have been used within the following number of last passwords: 4

Third-Party Proxy Access Information (continued)

4. Click **Submit**.



5. Your password has now been reset, and you have access to your student's information. You can find the information to which you have access in these apps: **Finances for Third Party** and **Academics for Third Party**.

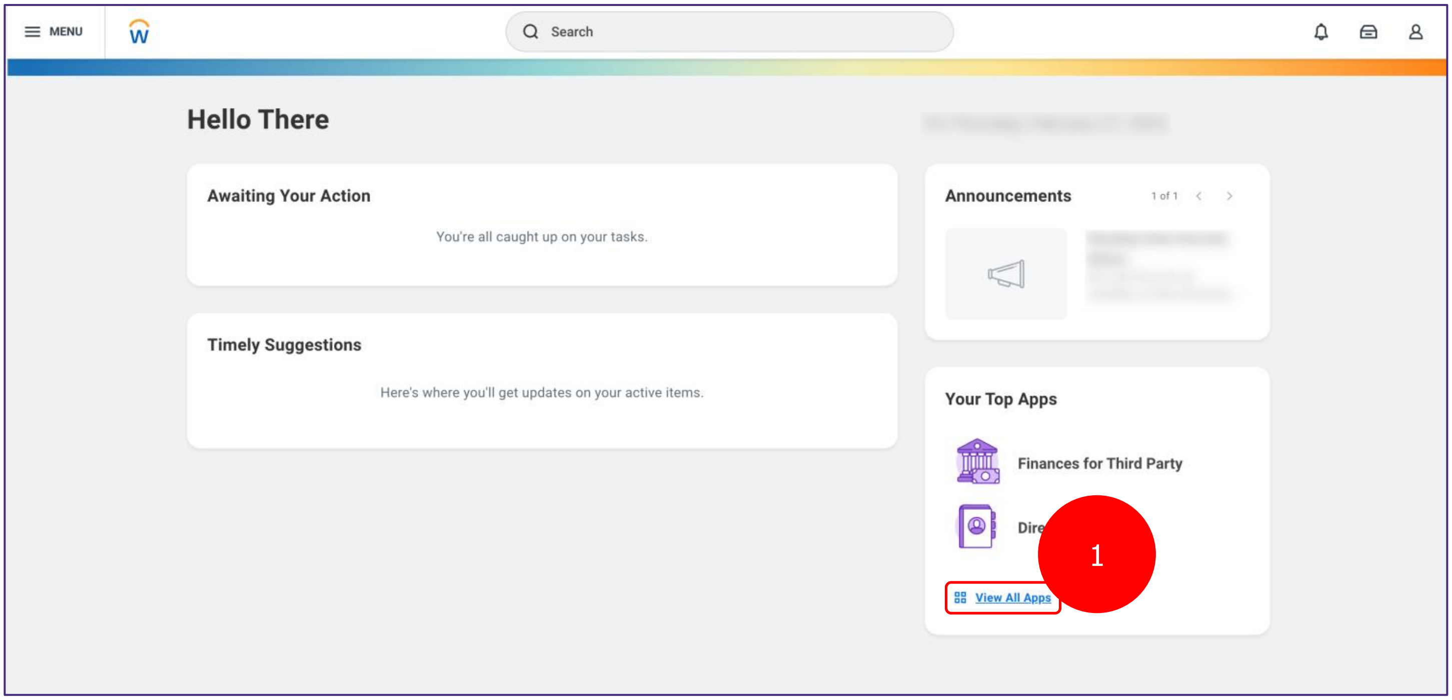


Third-Party Proxy Access Information (continued)

Adding Apps to Menu:

Once logged in, you can review the apps you have access to by clicking on View All Apps. This will allow you to view your student's information through the available apps. Based on the permissions granted by your student, you should have access to Finances for Third Party and/or Academics for Third Party. If these apps are not visible and you have confirmed with your student that you should have access, please follow the steps below to add the apps to your menu.

1. From the Workday homepage, click **View All Apps**.

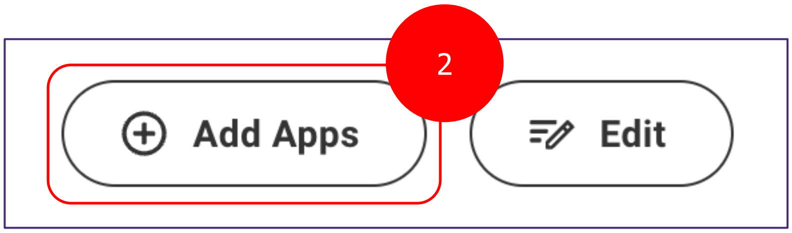


Helpful Hint:

To ensure easy access to Workday, bookmark the URL in your browser. Additionally, store your username and password securely in a location that is both safe and easily accessible.

Third-Party Proxy Access Information (continued)

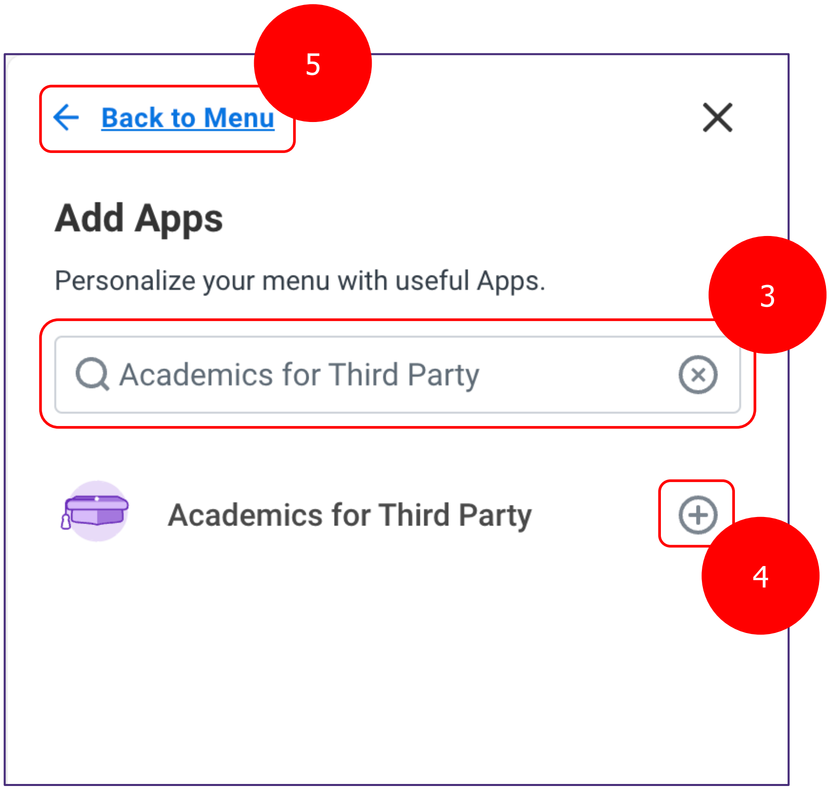
2. Review the list of available apps. If the app you need is not listed, click **Add Apps**.



3. In the **Find Apps search bar**, type the name of the app you wish to add.

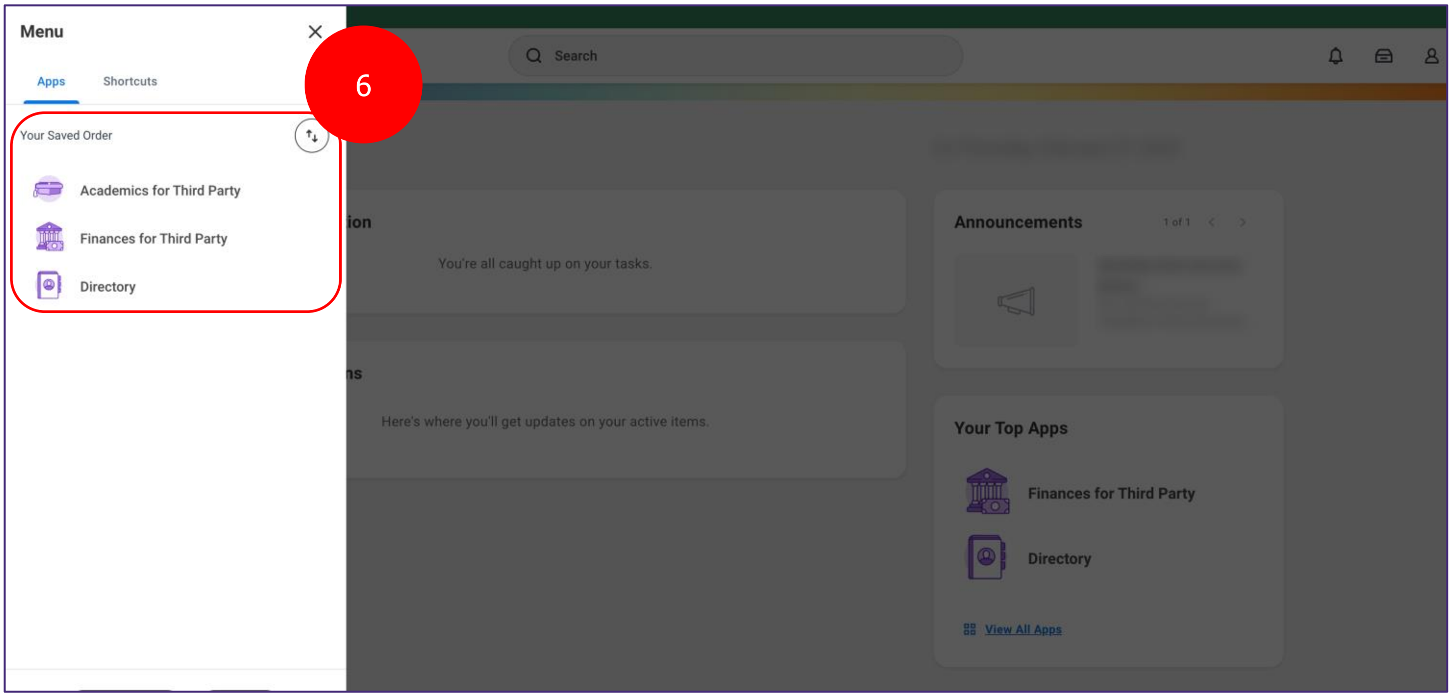
4. Once the search results appear, click the **plus sign (+)** next to the app you want to add to your menu.

5. Click **Back to Menu**.



Third-Party Proxy Access Information (continued)

6. You should now see the newly added app in your menu.



Helpful Hint:

To edit your apps menu (delete or reorder apps), click **Edit** at the bottom of the Apps Menu.

Forgot Login Information:

If you forget your username and/or password for your Workday third-party proxy access account, you will need to contact your student to have them remove your access and then re-add you with the necessary permissions. This process will trigger a new set of emails with new login credentials. Students can refer to the "Managing Friends and Family & Third-Party Permissions" reference guide, available on the LSU Workday Student website under Resources & Guides > Students > Profile Preferences > Third Party Permissions, to set up third-party access.

Resources

Every department on campus is here to support you! While their responsibilities may differ slightly, each one has its own area of expertise. Here's a quick overview of what each department specializes in.

- **Bursar Operations**
  - Charge Assessments (Fee Bills), Payments, Outside Scholarship, and International Student Health Insurance
  - Contact Information: bursar@lsu.edu // (225) 578-3357
- **Financial Aid & Scholarships**
  - Any loans, grants, or scholarships that are offered to students in their financial aid package
  - Contact Information: financialaid@lsu.edu // (225) 578-3103
- **Workday Student**
  - Webpage: https://www.lsu.edu/workdaystudent/resources/index.php