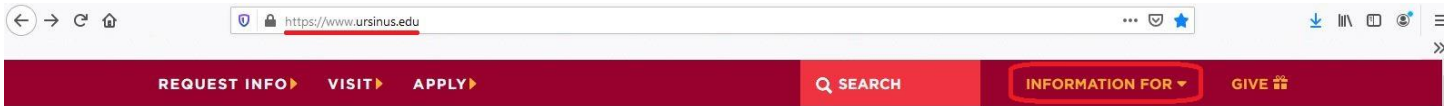


1. Go to www.ursinus.edu and click on the “INFORMATION FOR” menu at the top of the page



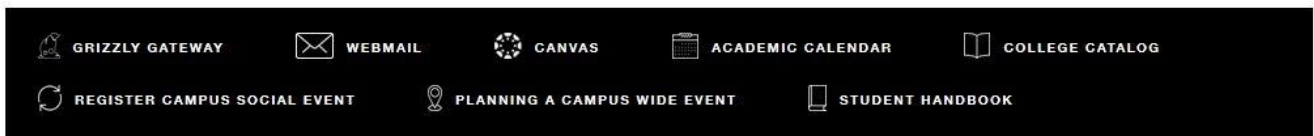
2. Click on “Students” in the “INFORMATION FOR” menu



3. On the Students page in the “STUDENT LINKS” section, click on the “Student Financial Services” tile

Students

POPULAR LINKS



STUDENT LINKS



4. Click on “Add Proxy Access for Bill”

The screenshot shows the 'STUDENT LINKS' page. At the top, there are 'GRID' and 'LIST' navigation options. Below are seven vertical image tiles: 'ALL', 'REGISTRATION', 'STUDENT RECORDS', 'STUDENT FINANCIAL SERVICES', 'DISABILITY SERVICES', 'ACADEMIC SUPPORT', and 'ADDITIONAL SERVICES'. A search bar is located below the tiles. Underneath the search bar are four main sections: 'Student Responsibility Agreement and Pay Bill', 'View Financial Aid Information', 'Add Proxy Access for Bill' (highlighted with a red box), and 'Student Financial Checklist'. Each section has a brief description of its content.

5. Enter your Ursinus credentials (username and password you use to access your email and the Grizzly Gateway) and click the blue “Sign In” button

The screenshot shows the Ursinus College sign-in page. It features the Ursinus College logo at the top. Below the logo is a placeholder for a user profile picture. The 'Sign In' section contains three input fields: 'Username', 'Password', and 'Remember me' (with a checkbox). A blue 'Sign In' button is located below these fields. A link for 'Need help signing in?' is at the bottom of the sign-in area.

6. Click on the “Select a Proxy” drop-down box

The screenshot shows the 'View/Add Proxy Access' page. At the top, there are navigation links for 'User Options' and 'View/Add Proxy Access'. The main heading is 'View/Add Proxy Access'. Below this is an information banner with a blue background and a white 'i' icon, containing text about selecting a proxy. Underneath is another information banner with a blue background and a white 'i' icon, stating that no proxies are currently designated. The 'Add a Proxy' section is highlighted in orange. It contains a 'Select a Proxy' label and a drop-down menu with the text 'Please Select'. The drop-down arrow is highlighted with a red box.

7. Click on "Add Another User"

Add a Proxy

Select a Proxy

Please Select

Please Select

Add Another User

8. Enter all required demographic information for your proxy

Add a Proxy

Select a Proxy

Add Another User

Prefix

Please Select

First Name *

First Name

Middle Name

Middle Name

Last Name *

Last Name

Suffix

Please Select

Email Address *

Email Address

Confirm Email Address *

Email Address

Email Type

Please Select

Phone *

Phone

Phone Extension

Phone Extension

Phone Type *

Please Select

Gender

Please Select

Relationship *

Please Select

9. Select the Access level that you want to give to your proxy

- a. If you select Allow Complete Access, this will allow us to communicate with this person regarding both your bill and your financial aid

Access *

Allow Complete Access

Allow Select Access

10. If you choose to "Allow Select Access" to your proxy, you will need to select what information we are able to share with them

NOTE: While you are able to select individual items under each section, we will need you to select an entire section to be able to discuss all facets of that area of our office with your proxy

Access *

Allow Complete Access

Allow Select Access

Student Finance ⓘ

Account Activity

Account Summary

Make a Payment

Financial Aid ⓘ

Award Letter

Financial Aid Home

Correspondence Option

My Awards

Required Documents

General ⓘ

Notifications

11. If you select “Allow Complete Access” for your proxy, it will automatically select all checkboxes within that section

Access *

Allow Complete Access

Allow Select Access

<input checked="" type="checkbox"/> Student Finance ⓘ	<input checked="" type="checkbox"/> Financial Aid ⓘ
<input checked="" type="checkbox"/> Account Activity	<input checked="" type="checkbox"/> Award Letter
<input checked="" type="checkbox"/> Account Summary	<input checked="" type="checkbox"/> Financial Aid Home
<input checked="" type="checkbox"/> Make a Payment	<input checked="" type="checkbox"/> Correspondence Option
	<input checked="" type="checkbox"/> My Awards
	<input checked="" type="checkbox"/> Required Documents

General ⓘ

Notifications

12. Be sure to read the Disclosure Agreement (explaining you are waiving rights to FERPA for this individual), check the authorization box, and click the blue “Submit” button

Disclosure Agreement

CONFIDENTIAL In compliance with FERPA and Ursinus College's policy on access to student education records, the College may not disclose your education records (or information contained therein) to anyone other than you. This prohibition extends to education records revealing your grades, billing, tuition and fees, assessments, and financial records (including scholarships, grants, work study, or loan amounts). This prohibition further applies but is not limited to disclosures to your parents, your spouse, or a sponsor. By clicking the box below, you authorize Ursinus College to disclose the specified to your selected recipient.

authorize the institution to disclose my information to this party

13. Once you have completed this, our office will be able to see your new proxy listed under your account and will be able to discuss your information regarding the areas that you granted them access to (steps 9-10)