

Grant a Third-Party Access to Your Student Record

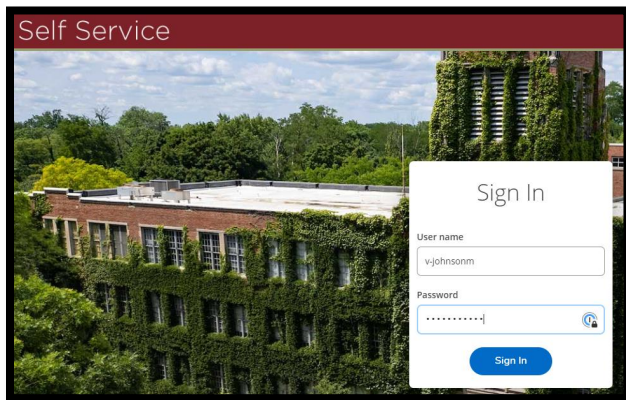
There are two options for students to grant a third-party access to their student record: Proxy and Student Record Release. Proxy permission(s) create a self-service account for the third party, which the third-party then can log into and view the student record (as if they are the student) based on the permission(s) the student has granted them. Student Record Release permissions give the third-party the ability to communicate with Aquinas College on behalf of the student (e.g., a phone call, email, or in-person). The instructions below outline how a student can grant, edit, or remove Proxy and Student Record Release permission(s).

Third Party (Proxy) Access in Self-Service

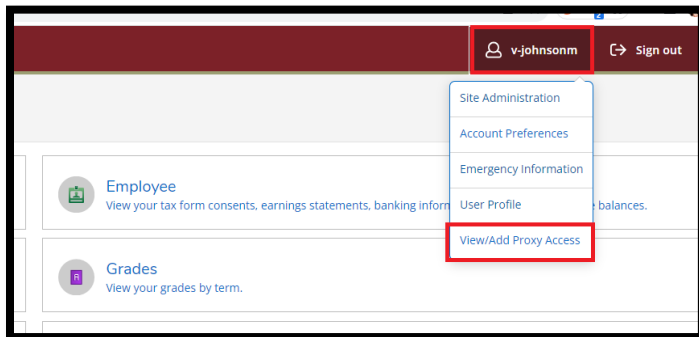
****Proxy (third-party) permissions can be full, partial, or none. Students are NOT required to grant proxy (third-party) access, and students can add, remove, or edit the permissions granted to a proxy (third-party) at any time.****

Granting a third-party (Proxy) access:

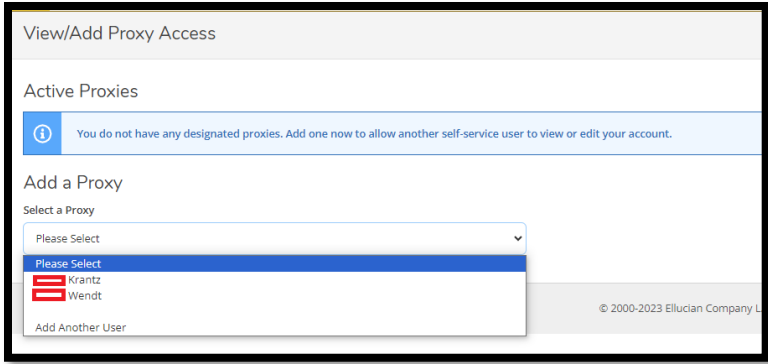
- 1) Log into [Self-Service](#) with your school username and password.



- 2) Click on your Username on the top, right and then click on 'View/Add Proxy Access.'



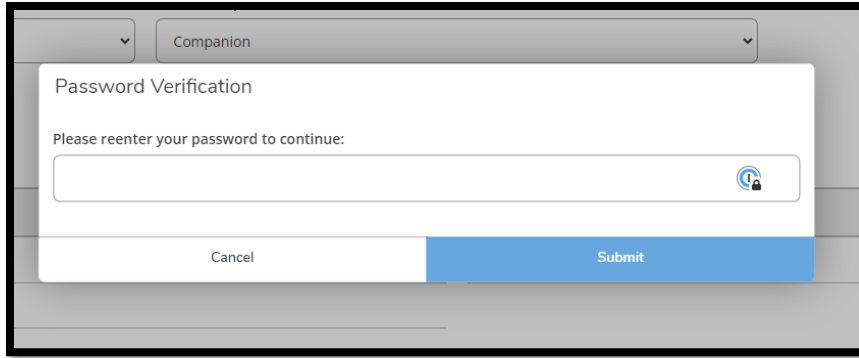
- 3) Click the drop down and select an individual who is already listed on your account as relative or having a relationship (e.g., companion) or select 'Add Another User' to add an individual.



4) If you are adding a new individual, enter the information for the person you wish to add as a Proxy.

5) Select the level of access you are granting to this person.
 a. *Please note the options you see in the image may change as we make more available.
 6) Check the authorization box, if you agree to the terms, and click 'Submit'

7) Re-enter your password and click 'Submit.'

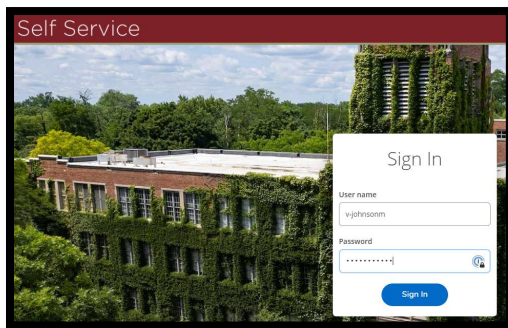


Once complete, the proxy (third-party) will receive an email with instructions on how to proceed

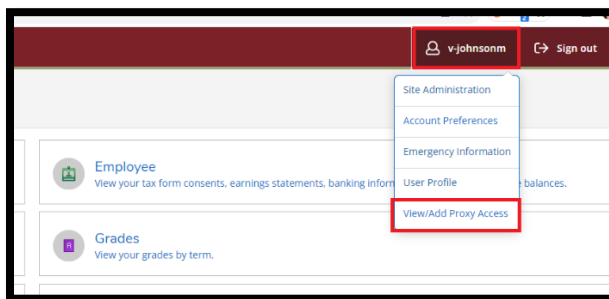
Editing or Removing third-party (Proxy) access:

Proxy will be notified if access is changed

- 1) Log into [Self-Service](#) with your school username and password.



- 2) Click on your Username on the top, right and then click on 'View/Add Proxy Access.'





- 3) Click on the pencil icon (edit) for the person you wish to edit Proxy Access.

Name	Proxy Access	Relationship	Effective Date	
 Wendt	Student Finance, General	Companion	8/20/2023	

4) Modify permissions, as needed, and then click 'Save.'

Edit Proxy Details

Name:  Wendt


Email Address: @gmail.com Relationship: Companion


Access

Allow Complete Access

Allow Select Access

Remove All Access

Student Finance 

General 

Account Summary

Notifications

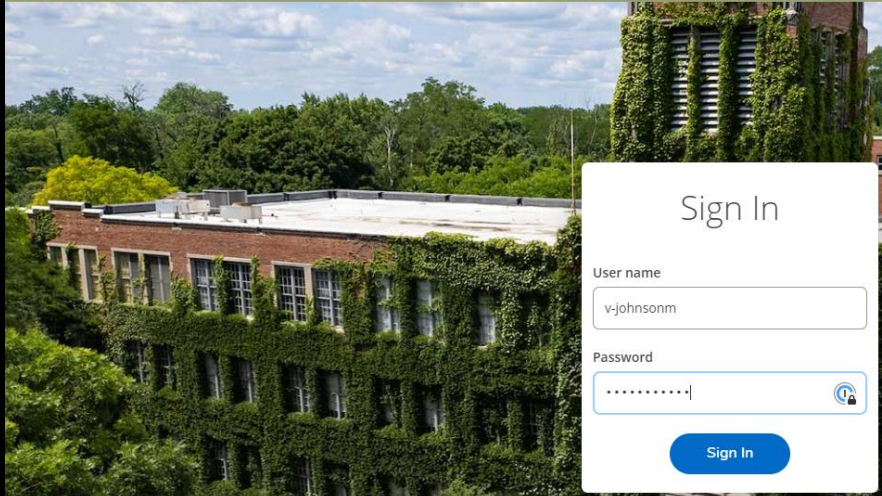
Student Record Release

****Student Record Release permissions can be full, partial, or none. Students are NOT required to grant a third-party access, and students can add, remove, or edit the permissions granted to a third-party at any time.****

Granting a third-party Student Record Release access:


1) Log into [Self-Service](#) with your school username and password.

Self Service



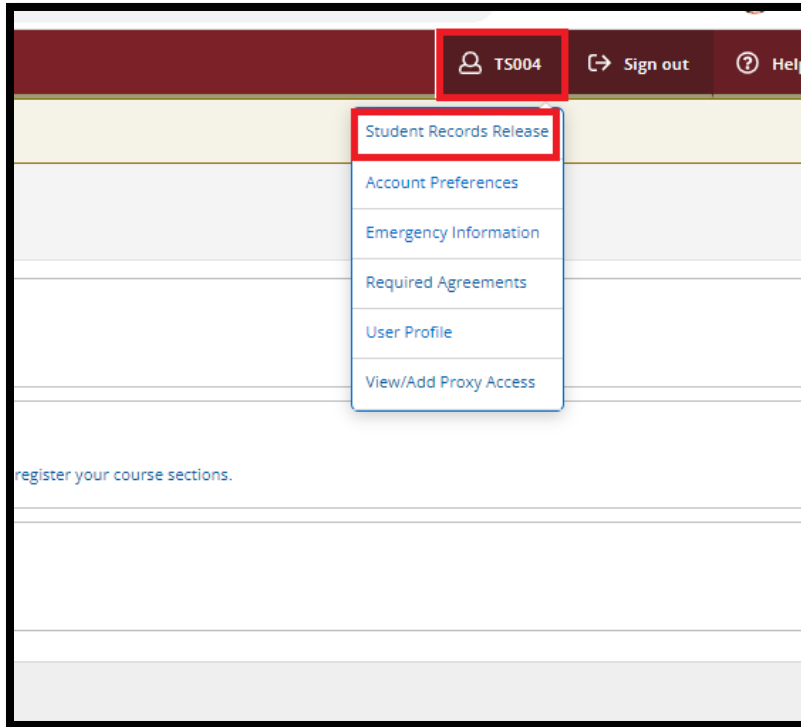
Sign In

User name

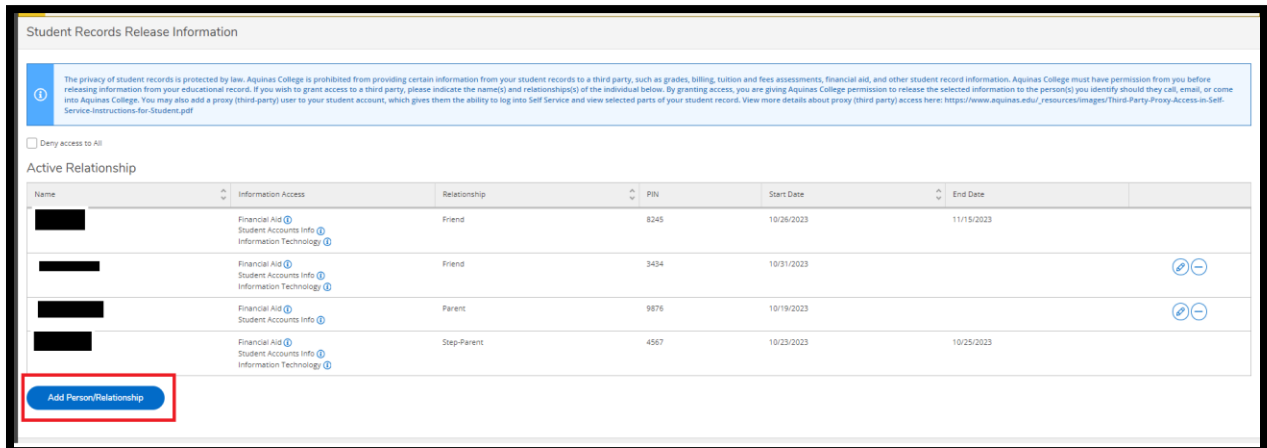
Password
 

Sign In

2) Click on your Username on the top, right and then click on 'Student Records Release.'



3) Click 'Add Person/Relationship' to add a new person.



4) Complete the form and click 'Submit'

Provide the pin, in a secure manner, to the person you are granting access to as they will need to verify this pin when making requests to discuss your student record

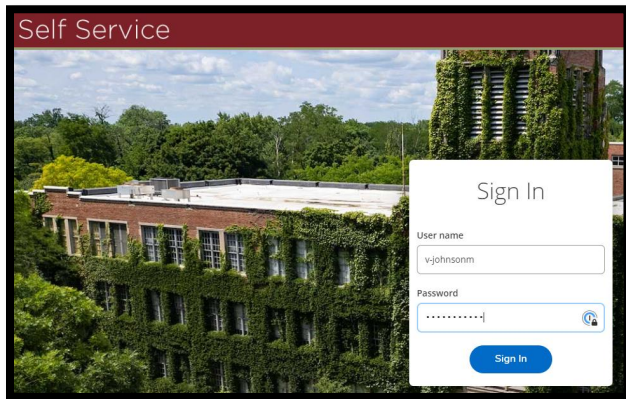
The screenshot shows a web form for granting access to student records. It includes fields for First Name, Last Name, Relationship (a dropdown menu), PIN (with a prompt 'Enter a 4 digit PIN'), Start Date, and End Date. Below these fields are radio buttons for 'Allow Complete Access' and 'Allow Select Access', with 'Allow Select Access' selected. Under 'Allow Select Access', there are three checkboxes: 'Financial Aid', 'Student Accounts Info', and 'Information Technology'. A 'Disclosure Agreement' section contains a checkbox and a paragraph of text. At the bottom are 'Cancel' and 'Submit' buttons.

The permission you have granted will be in effect until you remove it or the End Date has been reached, if you set an End Date.

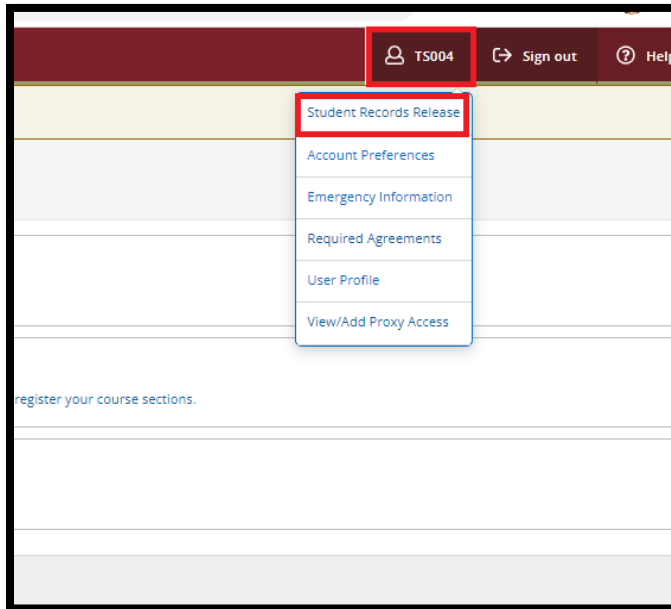
Editing or Removing third-party Student Record Release permission(s):

Third-party will NOT be notified if access is changed

1) Log into [Self-Service](#) with your school username and password.



2) Click on your Username on the top, right and then click on 'Student Records Release.'



3) To EDIT, click on the pencil icon to the right of the person, edit, and save.

4) To REMOVE, click on the subtraction icon to the right of the person.

a. When you remove a person's access, their name and information will remain displayed but with an end-date.

A screenshot of a table titled 'Active Relationship'. The table has columns for Name, Information Access, Relationship, PIN, Start Date, and End Date. There are four rows of data. The first row has a red box around the Name field. The second row has a red box around the subtraction icon (a minus sign) in the rightmost column. The third row has a red box around the pencil icon (edit) in the rightmost column. The fourth row has a red box around the subtraction icon (a minus sign) in the rightmost column.

Name	Information Access	Relationship	PIN	Start Date	End Date
[Red Box]	Financial Aid ⓘ Student Accounts Info ⓘ Information Technology ⓘ	Friend	8245	10/26/2023	11/15/2023
[Red Box]	Financial Aid ⓘ Student Accounts Info ⓘ Information Technology ⓘ	Friend	3434	10/31/2023	[Red Box]
[Red Box]	Financial Aid ⓘ Student Accounts Info ⓘ	Parent	9876	10/19/2023	[Red Box]
[Red Box]	Financial Aid ⓘ Student Accounts Info ⓘ Information Technology ⓘ	Step-Parent	4567	10/23/2023	10/25/2023