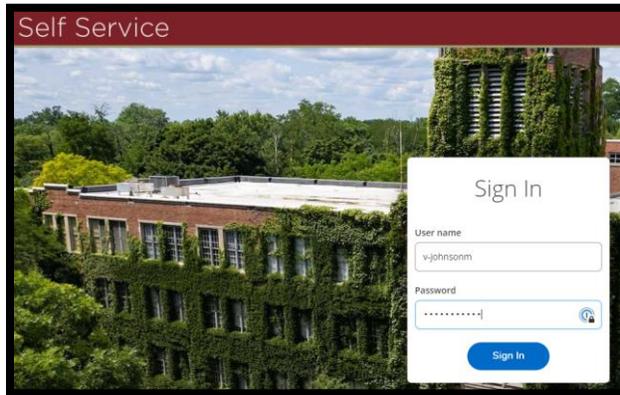


Third Party (Proxy) Access in Self-Service

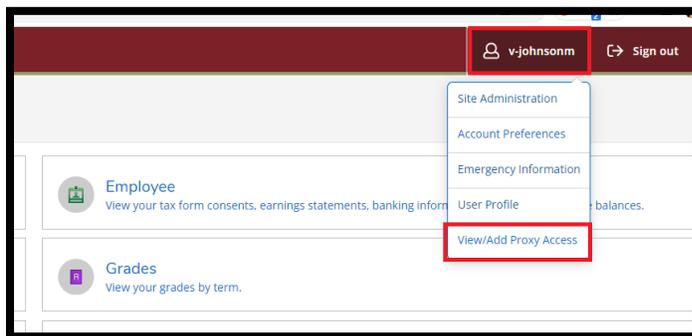
****Proxy (third-party) permissions can be full, partial, or none. Students are NOT required to grant proxy (third-party) access, and students can add, remove, or edit the permissions granted to a proxy (third-party) at any time.****

Assigning a third-party (Proxy) access:

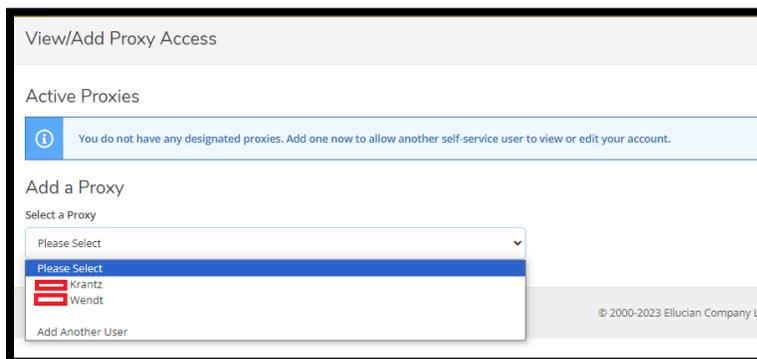
- 1) Log into [Self-Service](#) with your school username and password.



- 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.

The 'Add a Proxy' form contains the following fields:

- Select a Proxy: Add Another User (dropdown)
- First Name *: First Name (text input)
- Last Name *: Last Name (text input)
- Former First Name: Former First Name (text input)
- Former Last Name: Former Last Name (text input)
- Email Address *: Email Address (text input)
- Confirm Email Address *: Email Address (text input)
- Email Type: Please Select (dropdown)
- Phone: Phone (text input)
- Phone Extension: Phone Extension (text input)
- Phone Type: Please Select (dropdown)
- Birth Date *: M/d/yyyy (text input with calendar icon)
- Gender *: Please Select (dropdown)
- Relationship *: Please Select (dropdown)

- 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'

The 'Access' section includes:

- Access *: Allow Complete Access, Allow Select Access
- Student Finance: Student Finance (with info icon)
- Account Activity: Account Activity
- Account Summary: Account Summary
- Make a Payment: Make a Payment
- General: General (with info icon)
- Notifications: Notifications

The 'Disclosure Agreement' section includes:

- I authorize Aquinas College to disclose the items checked, to the individual I have selected above. I have the ability to amend this authorization at any time. This authorization does not permit the individual to make any changes
- I authorize the institution to disclose my information to this party
- Buttons: Cancel, Submit

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

The 'Password Verification' dialog box contains:

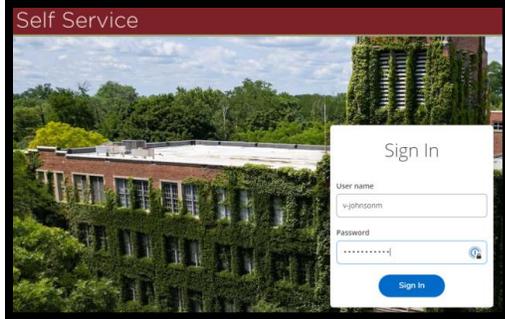
- Please reenter your password to continue: (text input with lock icon)
- Buttons: Cancel, Submit

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

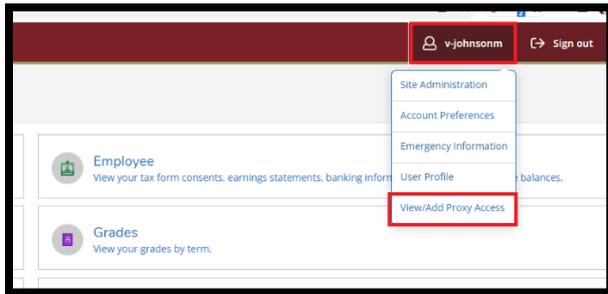
Editing or Removing third-party (Proxy) access:

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.



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

