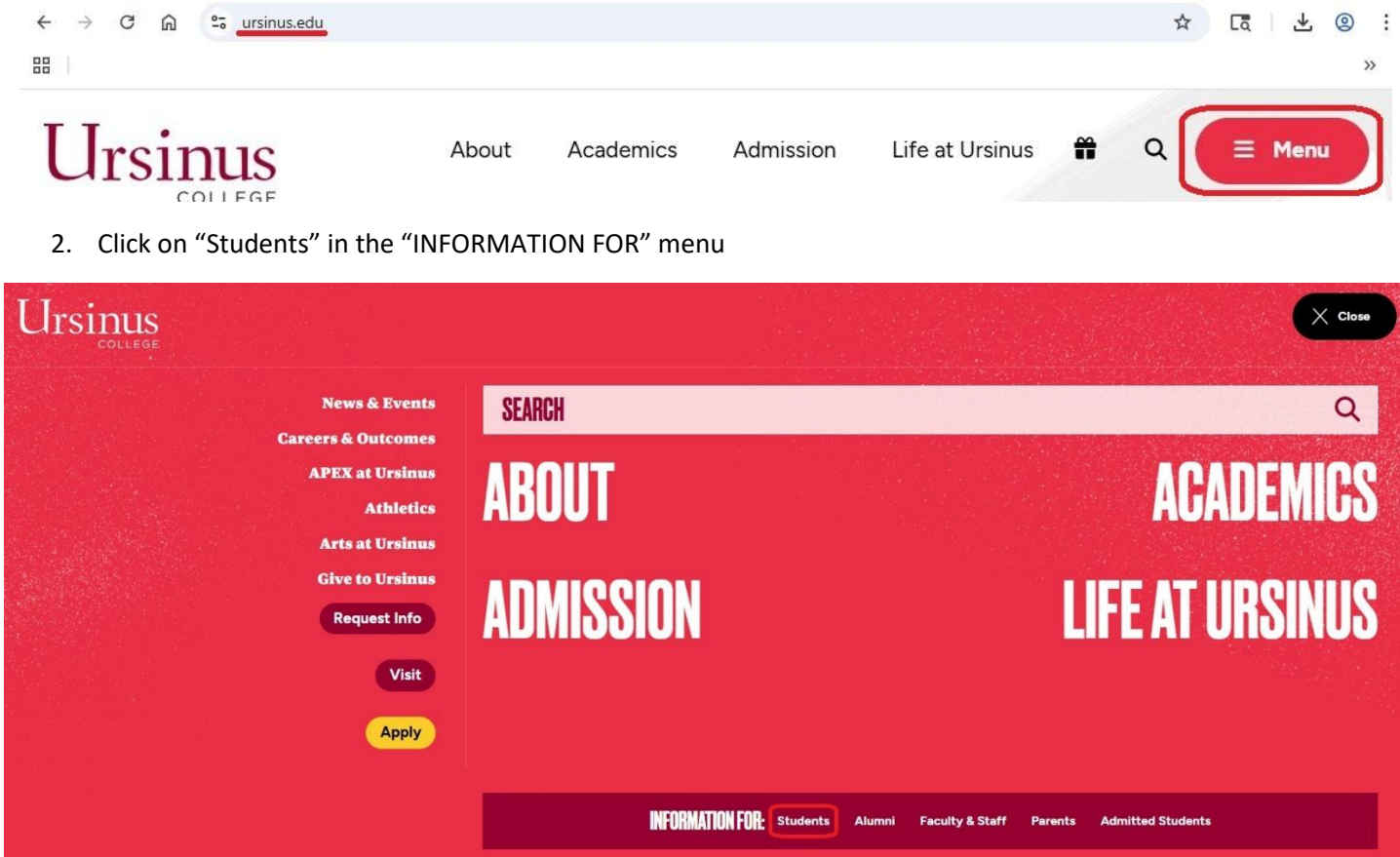
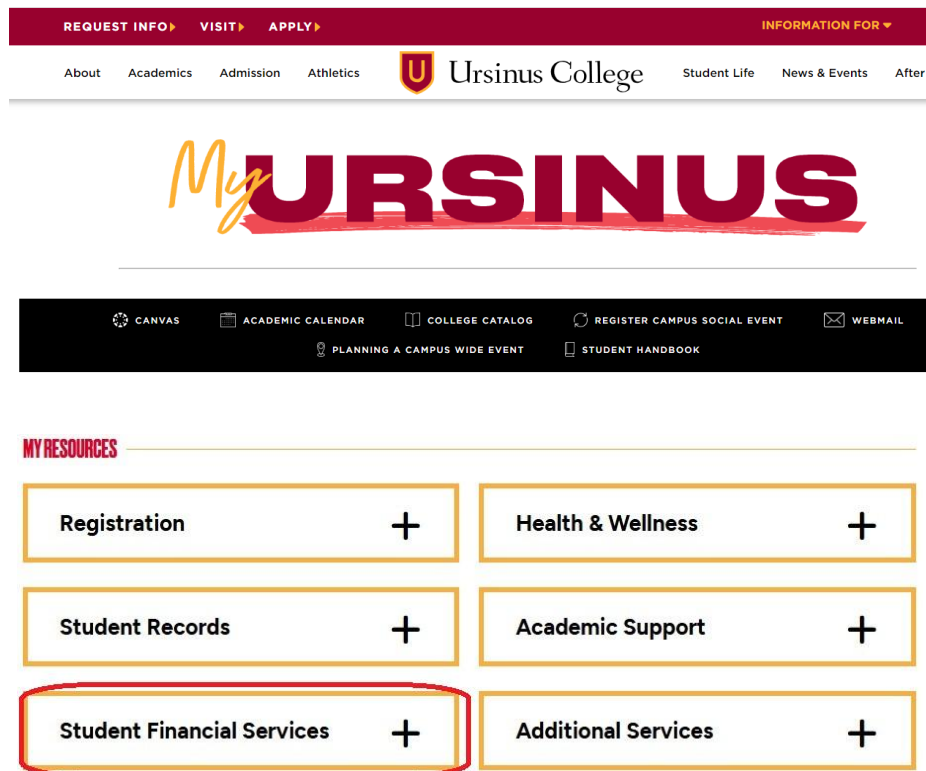


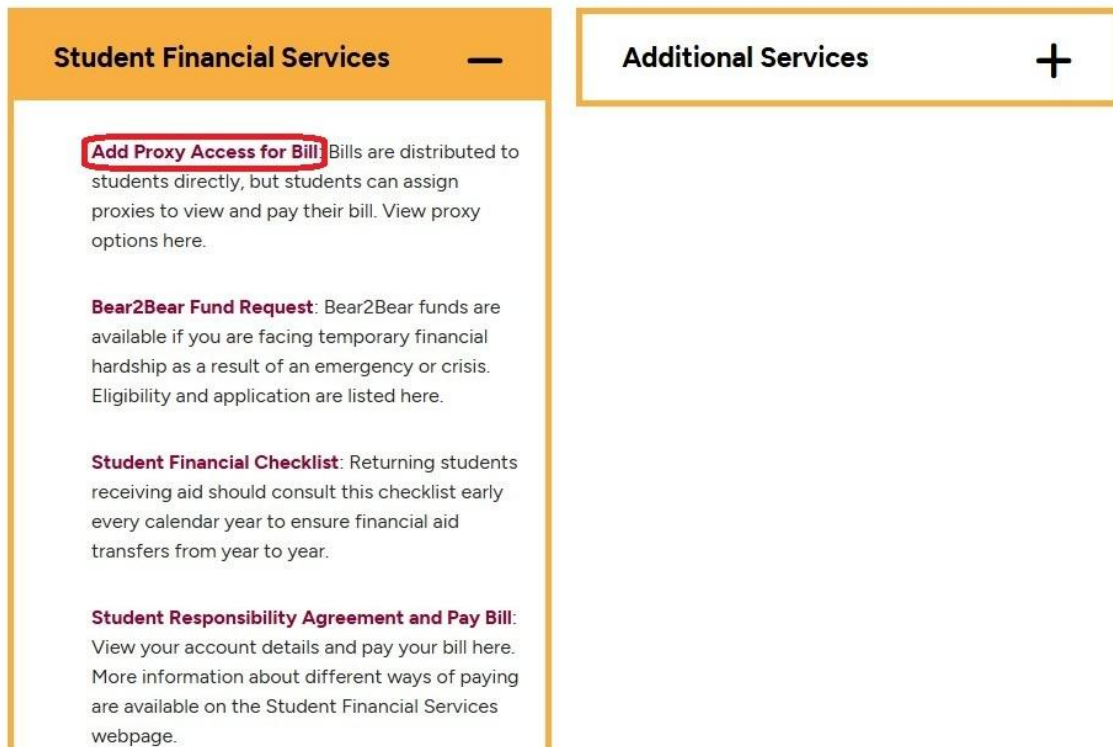
1. Go to www.ursinus.edu and click on the “INFORMATION FOR” menu at the top of the page



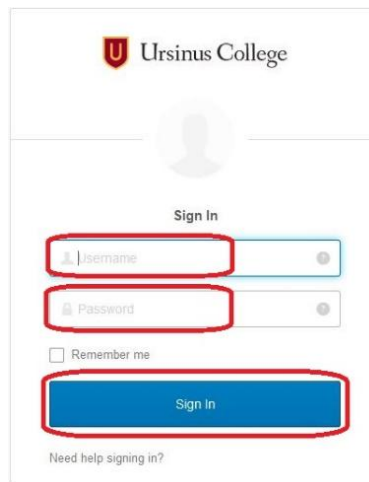
3. On the Students page in the “MY RESOURCES” section, click on the “Student Financial Services” tile



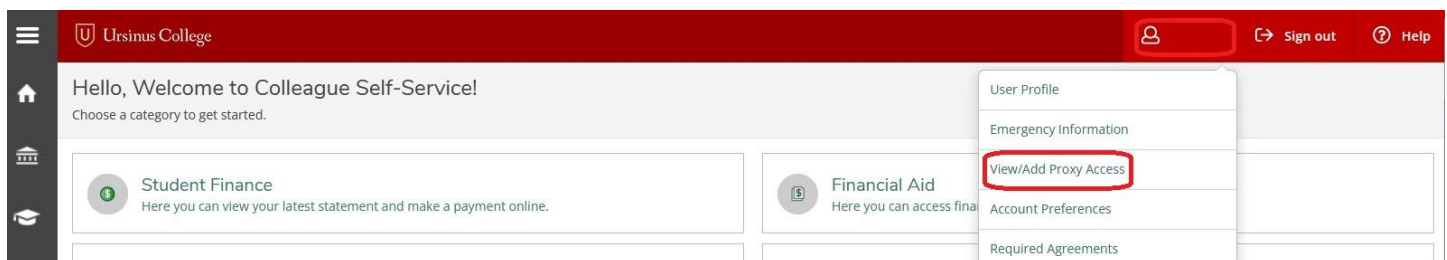
- Click on “Add Proxy Access for Bill”



- Enter your Ursinus credentials (username and password you use to access your email and the self-service portal) and click the blue “Sign In” button



- You may be redirected to your Self-Service Homepage, if you do, click on the person icon with your username and click “View/Add Proxy Access” on the dropdown



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

View/Add Proxy Access

Next to 'Select a Proxy', click on 'Please Select'. If you do not see your parent in the list, please email personproxy@ursinus.edu, to provide your parent the parent's email has been updated.

Active Proxies

You do not have any designated proxies. Add one now to allow another self-service user to view or edit your account.

Add a Proxy

Select a Proxy

Please Select

8. Click on “Add Another User”

Add a Proxy

Select a Proxy

Please Select

Please Select

Add Another User

9. 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

10. Select the Access level that you want to give to your proxy (this will likely default to “Allow Select Access”)
- If you select Allow Complete Access (**Recommended – skip to step 12 for guidance**), this will allow us to communicate with this person regarding both your bill and your financial aid

Access *

☐ Allow Complete Access

☒ Allow Select Access

11. 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 ⓘ	☒ Financial Aid ⓘ
☐ Account Activity	☐ Award Letter
☐ Account Summary	☐ Financial Aid Home
☐ Make a Payment	☐ Correspondence Option
	☐ My Awards
	☐ Required Documents

☒ General ⓘ
☐ Notifications

12. If you select “Allow Complete Access” (**Recommended**) for your proxy, it will automatically select all checkboxes within that section

Access *

☒ Allow Complete Access

☐ Allow Select Access

☒ Student Finance ⓘ	☒ Financial Aid ⓘ
☒ Account Activity	☒ Award Letter
☒ Account Summary	☒ Financial Aid Home
☒ Make a Payment	☒ Correspondence Option
	☒ My Awards
	☒ Required Documents

☒ General ⓘ
☒ Notifications

13. 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.

☒ I authorize the institution to disclose my information to this party

14. 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 10-12)