



## Proxy Access for Self-Service

Granting an individual proxy access to Self-Service will allow them to view your Financial Aid information. Typically, the person(s) you grant access to, are your parents or guardians, however, access is not limited to that relationship.

It is important to note that in order to add someone as a proxy they must already be in our system.

### Procedure for adding a proxy

From the User Options menu, choose View/Add Proxy Access

Click on the "Select a Proxy" drop-down box to view a list of people with whom you have a defined relationship in our system.

Note: If the person(s) you wish to add are not listed, please send an email to [aso@southwestern.edu](mailto:aso@southwestern.edu). In the email include the individual's full first and last name, mailing address, email address, phone number, and relationship to you. Please allow 48 hours before attempting to set up the proxy.



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You have the option to give your proxy access to all of your Financial Aid information, or only select items. See the screenshot below.

Before you leave the proxy access screen, read the Disclosure Agreement, and if you are sure you want to give proxy access to the individual you have chosen, check the box.

**SOUTHWESTERN UNIVERSITY** Sign out Help

User Options View/Add Proxy Access

## View/Add Proxy Access

All proxies must first be listed as a relation to the student and have a valid email address to be granted access. If you do not see the person you want to add as a proxy, please send an email to [aso@southwestern.edu](mailto:aso@southwestern.edu). Include the individual's full first and last names, their mailing address, email address, phone number, and relationship to you. Please allow 48 hours before attempting to set up the proxy.

### 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

I understand that anyone I add as a proxy will be able to see any information on the pages for which I provide access. This proxy access may take up to one hour after assignment to be available to the proxy. I also authorize University personnel to discuss the details of my student account and financial aid with my proxy. I understand that I can remove proxy access to a relation at any time through Self-Service.

Select a Proxy

Email Address Relationship

Access

Allow Complete Access

Allow Select Access

Financial Aid ⓘ

Award Letter

Financial Aid Home

My Awards

FA Outside Awards

Required Documents

Satisfactory Academic Progress

Federal Shopping Sheet

Academics ⓘ

Grades

General ⓘ

Notifications

### Disclosure Agreement

The Family Educational Rights and Privacy Act (FERPA) of 1974 governs access to - and the release of - student records. Under FERPA, the University may not disclose non-directory information without the student's written consent. By providing proxy access, a student is granting non-directory information access to the named proxy (usually a parent or other relation). Students have the ability to grant access to non-directory information in one or more of the following areas: grades, notifications, account information, and/or financial aid. Granting proxy access is limited only to the information provided in the Self-Service portal, and does not provide a blanket FERPA waiver for release of non-directory information with any other University instructor, academic advisor, or department. If the student wishes for a relation to have access to information beyond the proxy access, the student must complete a FERPA form with the specific person or department. For more information, visit the [User/Staff's Office, Transcript Request & Other Forms webpage](#).

I can remove this proxy access at any time by returning to this screen and editing the record.

I authorize the institution to disclose my information to this party

Cancel Save

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Once you have successfully added your proxy or proxies, you will see this screen, which will include your list. Please note, it could take up to an hour for your proxy to gain access.



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They will receive an email at the address we have in our system notifying them that you have granted proxy access. If you want to add another proxy, use the "Select a Proxy" pull down menu, and choose another individual.

The screenshot shows the 'View/Add Proxy Access' page in the Southwestern University system. The page has a yellow header with the university logo and navigation links for 'User Options' and 'View/Add Proxy Access'. A blue information box at the top states: 'All proxies must first be listed as a relation to the student and have a valid email address to be granted access. If you do not see the person you want to add as a proxy, please send an email to aso@southwestern.edu. Include the individual's full first and last names, their mailing address, email address, phone number, and relationship to you. Please allow 48 hours before attempting to set up the proxy.'

Below this is the 'Active Proxies' section, which contains a table with the following data:

Name	Proxy Access	Relationship	Effective Date	
[Redacted]	Financial Aid, General, Academics	[Redacted]	04-03-2019	[Edit icon]

Underneath the table is the 'Add a Proxy' section, which includes another blue information box: 'I understand that anyone I add as a proxy will be able to see any information on the pages for which I provide access. This proxy access may take up to one hour after assignment to be available to the proxy. I also authorize University personnel to discuss the details of my student account and financial aid with my proxy. I understand that I can remove proxy access to a relation at any time through Self-Service.'

Below the information box is a 'Select a Proxy' dropdown menu with the text 'Please Select' and a downward arrow.

At the bottom of the page, there is a copyright notice: '© 2000-2019 Ellucian Company L.P. and its affiliates. All rights reserved. [Privacy](#)'

If you have any questions or concerns, contact the Financial Aid Office at [finaid@southwestern.edu](mailto:finaid@southwestern.edu) or 512-863-1259.