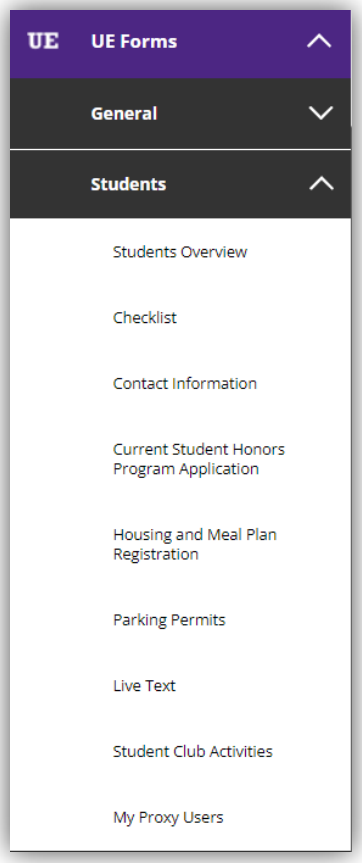
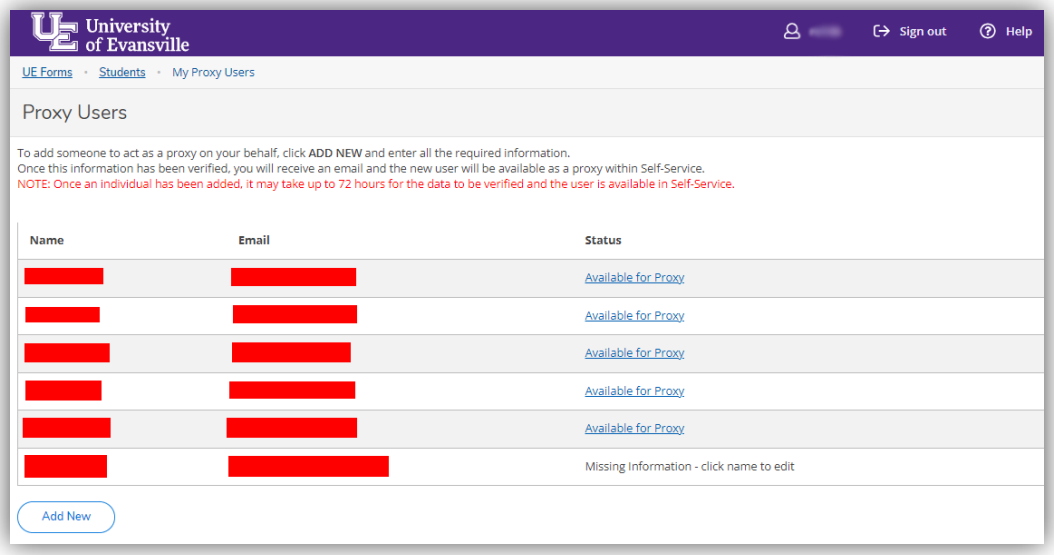
Granting Proxy Access

Students may wish to grant proxy access to family members or friends, so that those designated individuals can – using their own credentials to the UE systems – access a student's billing, financial, or tax information. The proxy user might need to pay a bill or access the ***1098-T tax documentation****.* NOTE: A proxy does not have to be a parent – it can be any person to whom the student wishes to grant proxy access.

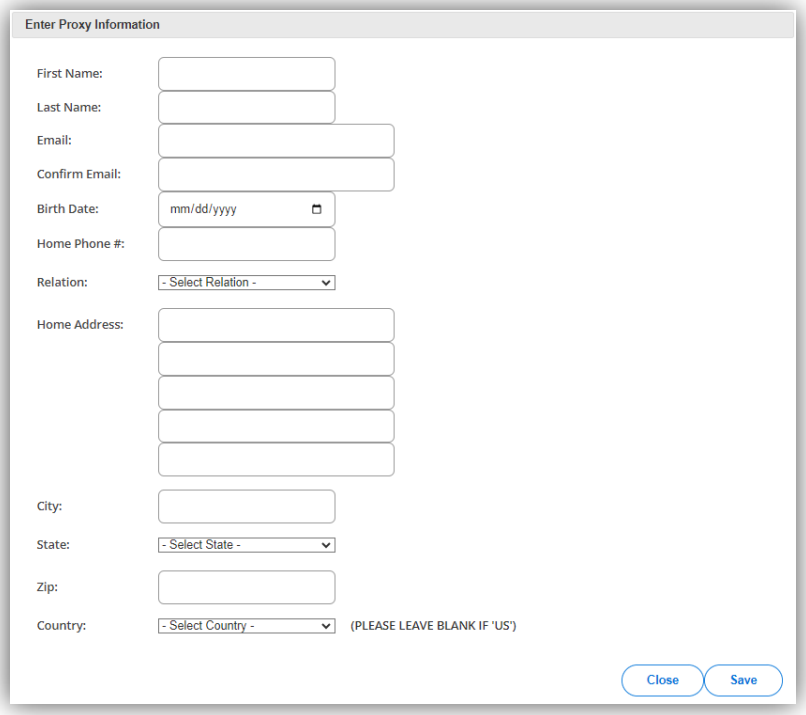
To grant proxy access to an individual, a student should first login to Self-Service (https://selfservice.evansville.edu/Student). Using the left-hand menu, locate the section for "UE Forms", then "Students". Within that section, locate and click "My Proxy Users".





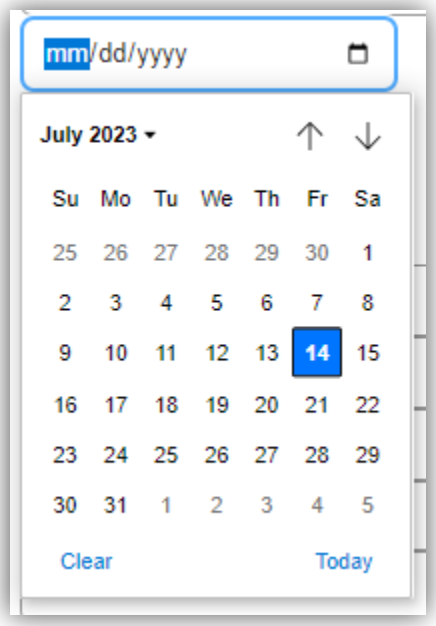
If the student already has a parent or other relation defined in our systems, they will be displayed on this form. To begin the process of granting one of these existing persons the ability to be a proxy, the student should click on that person's name in the left column and confirm that all information for the proxy has been entered.

If there are no current proxy users, or if the person to whom the student wishes to grant access is not yet present and available, the student should click “ADD NEW” to begin adding a new proxy.

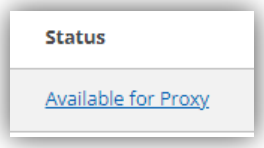


Whether creating a new user, or confirming an existing user as a proxy, the student needs to provide all information on this form, including full name, a valid email address, date of birth, home phone number, relation type, and a valid address.

The date of birth tool allows the student to use a calendar tool. The student should first choose month and year, and upon clicking the day number, the tool will update the form.



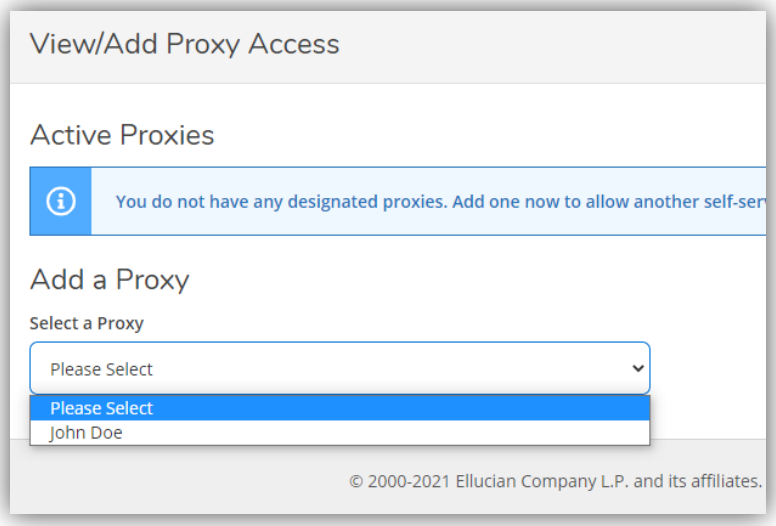
After completing the form, the student should click “SAVE”.



After submitting, the Student Financial Services team will verify the information. **This process can take up to 3 days**. Once that is completed, the student will receive an email saying the user is ready for proxy access.

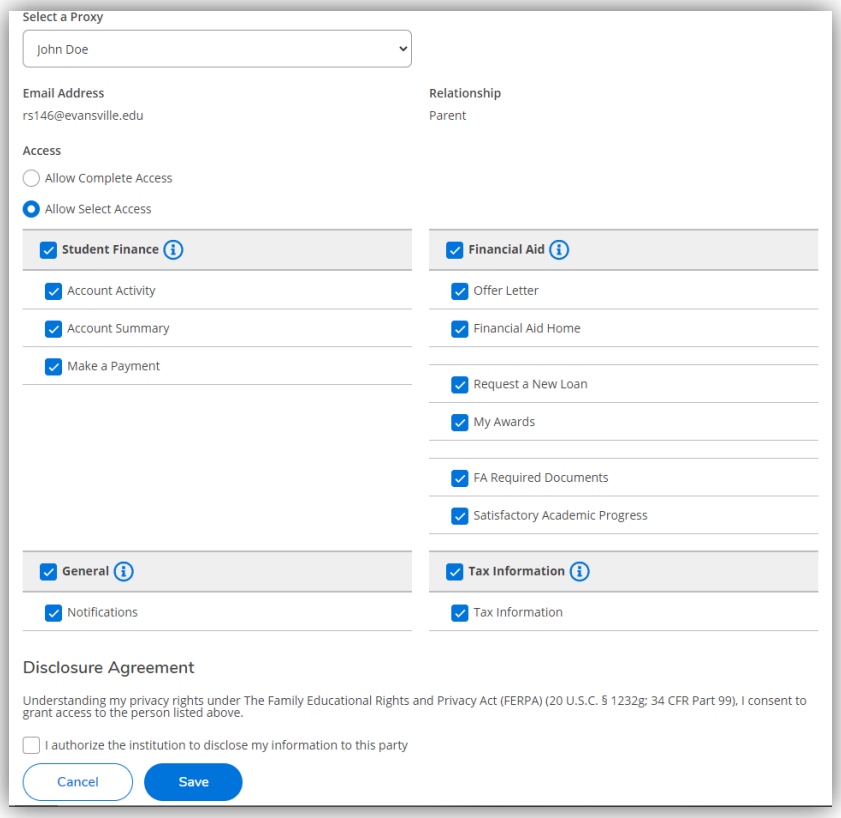
After receiving that email, the "Status" of the entry will be changed to "Available for Proxy". The student should click this link, which will take them to the "View/Add Proxy Access" form in Self-Service.

If existing proxy users are defined, they will be listed. If no proxy users are present, the student should select from available choices using the dropdown "Select a Proxy". The student can now grant access to items they wish to share with this proxy user.



Allow Complete Access puts a checkmark in every item. Conversely, the student can select **Allow Select Access** and can choose individual items.

NOTE: If a student wishes to allow their proxy to pay their bills, at a minimum, they should check Account Activity, Account Summary, and Make a Payment within Student Finance. Additionally, if the proxy does pay the bills, they should be granted access to Tax Information so they can obtain the annual 1098-T document. These selections can be modified at **any time**.



At the bottom is a statement about FERPA privacy rights. Students are encouraged to familiarize themselves with these laws.

Students should put a checkmark next to **I authorize…**, then click **Save** to complete their request.

If the email address provided for your proxy user is correct, then immediately after approving a proxy, that proxy will receive an email from UE regarding their proxy username and initial password. Should the email address prove to be invalid, a member of OTS may contact you to provide a correct email address. If your proxy user should ever have difficulty logging in, the proxy should contact the OTS Helpdesk at 812-488-2077 during regular business hours, Monday through Friday, 8:00 AM to 5:00 PM.