Fairfield University

Managing Your Authorized User (Proxy Access) in my.Fairfield

The Fairfield University student portal, ***my.Fairfield***, will be used to establish proxy access and assign passphrases for proxy's to use when communicating via phone, email, writing or in-person with the offices of the Bursar and Financial Aid when assistance is needed. Refer to the navigation below as a how-to guide on these processes:
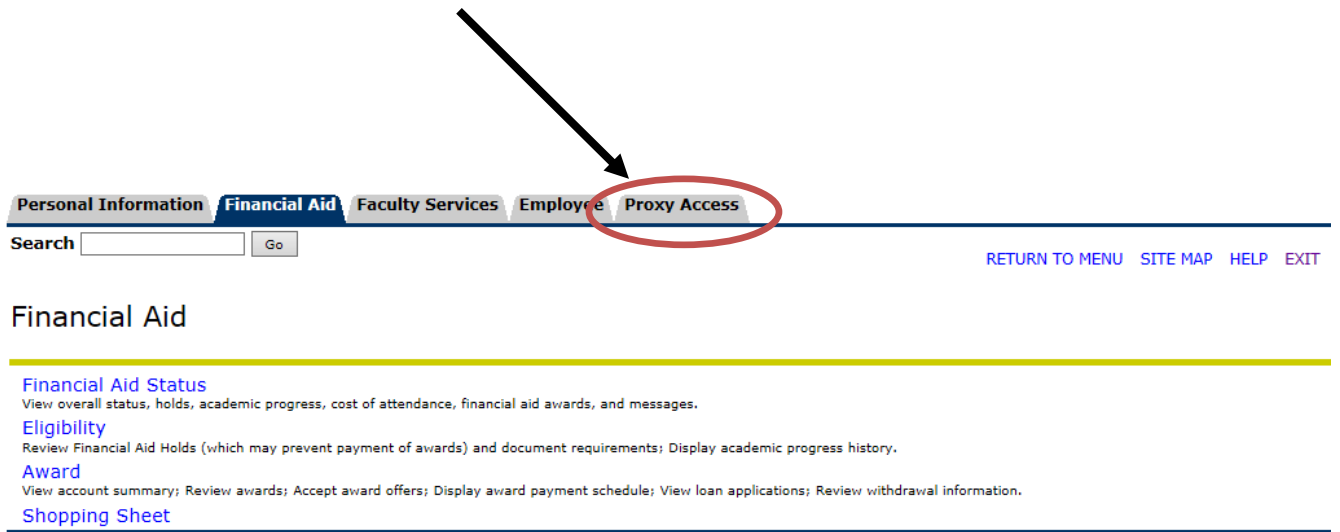
To establish a proxy:

1. Log into ***my.Fairfield*** with Net ID/password (for NetID issues, contact itshelpdesk@fairfield.edu).

2. Search for <mark>Proxy Access</mark> in the Search bar and select the Proxy Access task:

3. By selecting ==Proxy Access==, a new window will generate. On this page, you will find detailed information: the **Proxy Access** tab.

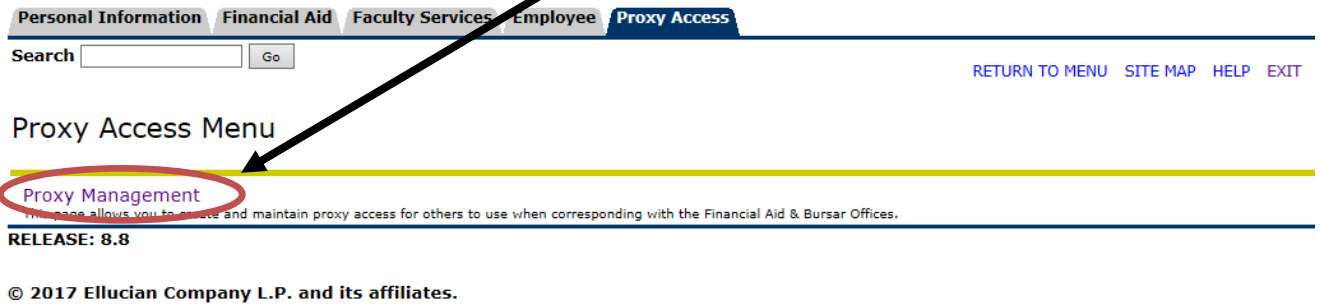To establish a proxy, select the **==Proxy Access Tab==**.

Personal Information | **Financial Aid** | **Faculty Services** | **Employee** | **Proxy Access**

Search [   ] [Go]

RETURN TO MENU   SITE MAP   HELP   EXIT

Financial Aid

Financial Aid Status
View overall status, holds, academic progress, cost of attendance, financial aid awards, and messages.

Eligibility
Review Financial Aid Holds (which may prevent payment of awards) and document requirements; Display academic progress history.

Award
View account summary; Review awards; Accept award offers; Display award payment schedule; View loan applications; Review withdrawal information.

Shopping Sheet

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4. Selecting the **Proxy Access Tab** will open the **Proxy Access Menu.** Select <mark>Proxy Management.</mark>

| Personal Information | Financial Aid | Faculty Services | Employee | **Proxy Access** |

Search [   ] [Go]

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Proxy Access Menu

Proxy Management

This page allows you to create and maintain proxy access for others to use when corresponding with the Financial Aid & Bursar Offices.

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5. The **Proxy Management** screen will open next. On this screen, you will complete the following 2 steps:

a. Add a Proxy

b. Establish a Passphrase. You will also be able to edit passphrases, assign your relationship to the proxy and expire the proxy access to rescind authorization

First, you must <mark>Add Proxy.</mark>

| Personal Information | Financial Aid | Faculty Services | Employee | Proxy Access |

Search [_____] [Go]   RETURN TO MENU   SITE MAP   HELP   EXIT

Proxy Management

Proxy List
Step 1: Click on Add Proxy
Step 2: Expand a proxy to define Relationship, create a Passphrase, and set Start and Stop Dates

⚑ Your proxy list is empty.

👤 Add Proxy
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6. Once you click on **Add Proxy,** a new area of the window will open called **Add a Proxy.** Each proxy you add must have their own email address and cannot share an email address with another proxy. For example:

   mom.smith999999@gmail.com

   dad.smith999999@gmail.com

   Complete all required fields. Once you fill in all required fields, click Add Proxy.

| Personal Information | Financial Aid | Faculty Services | Employee | Proxy Access |

Search [   ] [Go]   RETURN TO MENU   SITE MAP   HELP   EXIT

Proxy Management

Proxy List
💬 Step 1: Click on Add Proxy
    Step 2: Expand a proxy to define Relationship, create a Passphrase, and set Start and Stop Dates

🚩 Your proxy list is empty.

Add a Proxy
💬 Add a new proxy using the form below. There can only be one proxy per E-mail Address.

✱ - indicates a required field.

First Name✱   [Mom   ]
Last Name✱   [Smith   ]
E-mail Address✱   [mom.smith999999@gmail.com]
Verify E-mail Address✱ [mom.smith999999@gmail.com]
[Add Proxy]
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Enter all required fields and **Click Add Proxy**

7. Once you click on **Add Proxy,** the screen appears as follows below. The **GREEN** check appears to indicate that a new proxy has been successfully added. The reminder to **assign a relationship and add a passphrase** appears. ***BOTH ARE REQUIRED FOR SUCCESSFUL COMPLETION OF PROXY SET-UP!**

Expand the proxy to assign a relationship and add a passphrase

The proxy will appear with the 'lock' until the **relationship** & **passphrase** have been assigned by the student.

Personal Information Financial Aid Faculty Services Employee **Proxy Access**

Search [ ] [Go]   RETURN TO MENU   SITE MAP   HELP   EXIT

Proxy Management

✔ A new proxy has been successfully added. Please make sure to complete Step 2 and assign the Relationship and Passphrase.

Proxy List
   Step 1: Click on Add Proxy
      Step 2: Expand a proxy to define Relationship, create a Passphrase, and set Start and Stop Dates

   Expand Mom Smith   mom.smith999999@gmail.com 0 pages 🔒

   Add Proxy
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8. After you have 'clicked' to **Expand** the proxy, the **Proxy Profile** will open. <mark>Please complete the following steps:</mark>

    a. Select a relationship – the only choice is **Parent or Legal Guardian.**

In some instances, you, the student, may wish to assign to proxy access to someone other than a parent or legal guardian such as a grandparent or aunt/uncle. In those instances, please select **parent or legal guardian** as the relationship type and then indicate the actual relationship in the **Description Field**.

    b. Description - Please use this field to indicate whom the proxy is to you the student.

    c. <mark>Passphrase</mark> – While not starred as a **required field,** <mark>THIS IS A REQUIRED FIELD</mark>. This is a word or phrase **assigned by the student** that will be **emailed to the proxy**. The proxy will use this to be able to communicate, in accordance with FERPA, with the offices of the Bursar and Financial Aid.

    d. Start Date – the defaulted start date will be the date that the proxy is being established by the student.

    e. Stop Date – the defaulted stop date will be 5 years from the date that the proxy is being established. The stop date can be edited at any time in the future to rescind/cancel/remove proxy access.

Once you have entered all of the fields, YOU MUST <mark>CLICK ON 'E-mail Passphrase'</mark> in order for your proxy to receive the PROXY PASSPHRASE. A **GREEN** check will appear once the passphrase has been emailed to the proxy.

9. On the same page, the authorization tab is not currently in use at this time.

10. On the same page, the **communication tab** is a log of the emails sent from the student to the proxy's. In this example, you can see on the **communication tab**

*Please note: At this time, the RESEND icon is currently disabled. If you click on it, nothing will happen.

If you need to resend the email with the passphrase to an established proxy, please complete the following steps:
1. Select the PROFILE tab as shown in the picture above.
2. Once on the PROFILE tab, select EMAIL PASSPHRASE
3. The passphrase will then be resent and you will be able to see the email logged on your COMMUNICATION tab.