



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:

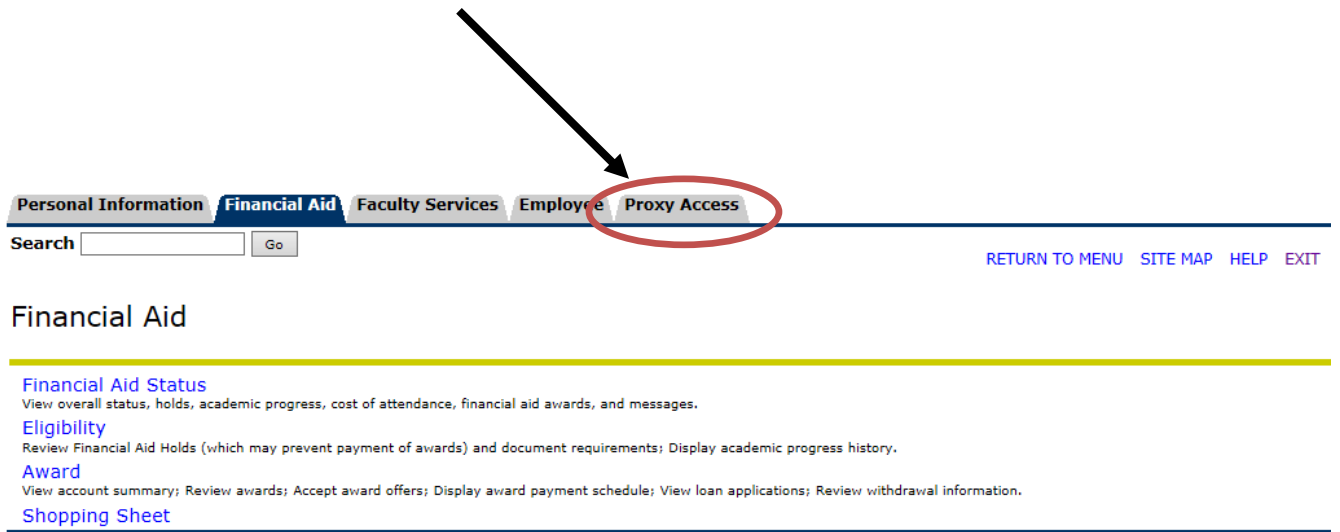
To establish a proxy:

1. Log into [my.Fairfield](https://my.fairfield.edu) with Net ID/password (for NetID issues, contact itshelpdesk@fairfield.edu).
2. Search for **Proxy Access** in the Search bar and select the Proxy Access task:

The screenshot shows the my.Fairfield search results page. The search bar at the top contains the text "Proxy Access" and is circled in red. Below the search bar, the results are filtered by "Student". Under the "Tasks" section, the first result is "PROXY ACCESS: Managing Your Authorized User" with the subtext "Authentication Required". This result is also circled in red. Below the "Tasks" section, there are several "Task Centers" listed, including "Academic & Career Development Center", "Information Technology Svcs.", "LaunchPad (my.Fairfield)", "Office of the Bursar", and "Registrar".

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

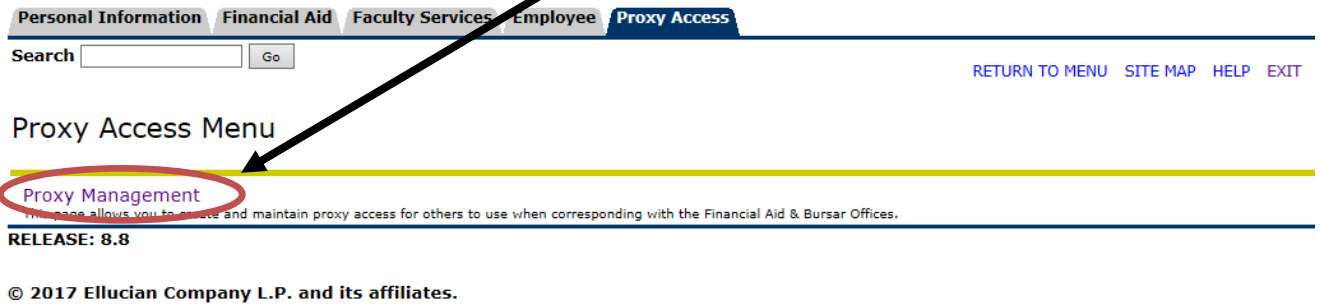
To establish a proxy, select the **Proxy Access Tab**.



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4. Selecting the **Proxy Access Tab** will open the **Proxy Access Menu**. Select **Proxy Management**.



The screenshot displays a web application interface. At the top, there is a navigation bar with tabs for 'Personal Information', 'Financial Aid', 'Faculty Services', 'Employee', and 'Proxy Access'. Below the navigation bar is a search field with a 'Go' button and links for 'RETURN TO MENU', 'SITE MAP', 'HELP', and 'EXIT'. The main content area is titled 'Proxy Access Menu'. A yellow horizontal line separates the menu title from the list of options. The first option, 'Proxy Management', is circled in red. A black arrow points from the 'Proxy Management' text in the instruction above to the circled 'Proxy Management' link in the screenshot. Below the menu options, there is a 'RELEASE: 8.8' label and a copyright notice: '© 2017 Ellucian Company L.P. and its affiliates.'

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 **Add Proxy**.

The screenshot shows a web application interface with a navigation bar at the top containing tabs for 'Personal Information', 'Financial Aid', 'Faculty Services', 'Employee', and 'Proxy Access'. Below the navigation bar is a search field with a 'Go' button and links for 'RETURN TO MENU', 'SITE MAP', 'HELP', and 'EXIT'. The main heading is 'Proxy Management'. Underneath, there is a 'Proxy List' section with instructions: 'Step 1: Click on Add Proxy' and 'Step 2: Expand a proxy to define Relationship, create a Passphrase, and set Start and Stop Dates'. A message states 'Your proxy list is empty.' At the bottom of the list, there is a button labeled 'Add Proxy' with a small icon, which is circled in red. A black arrow points from the highlighted 'Add Proxy' text in the instructions above to this button. Below the button, the text 'RELEASE: 8.7' is visible. At the very bottom of the page, the copyright notice '© 2017 Ellucian Company L.P. and its affiliates.' is present.

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*	<input type="text" value="Mom"/>
Last Name*	<input type="text" value="Smith"/>
E-mail Address*	<input type="text" value="mom.smith999999@gmail.com"/>
Verify E-mail Address*	<input type="text" value="mom.smith999999@gmail.com"/>

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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.

The screenshot shows the 'Proxy Access' tab in a web application. At the top, there are navigation tabs: 'Personal Information', 'Financial Aid', 'Faculty Services', 'Employee', and 'Proxy Access'. Below the tabs is a search bar with a 'Go' button and links for 'RETURN TO MENU', 'SITE MAP', 'HELP', and 'EXIT'. The main heading is 'Proxy Management'. A green checkmark icon is followed by the text: 'A new proxy has been successfully added. Please make sure to complete Step 2 and assign the Relationship and Passphrase.' Below this is a 'Proxy List' section with two steps: 'Step 1: Click on Add Proxy' and 'Step 2: Expand a proxy to define Relationship, create a Passphrase, and set Start and Stop Dates'. A table lists a proxy for 'Expand Mom Smith' with the email 'mom.smith999999@gmail.com' and '0 pages'. A red circle highlights the 'Expand' button, and a black arrow points from the yellow header to this button. Below the table is an 'Add Proxy' button with a person icon. At the bottom, it says 'RELEASE: 8.7'.

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8. After you have 'clicked' to **Expand** the proxy, the **Proxy Profile** will open. **Please complete the following steps:**
- 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**.
 - Description - Please use this field to indicate whom the proxy is to you the student.
 - Passphrase** – While not starred as a **required field**, **THIS IS A REQUIRED FIELD**. 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.
 - Start Date – the defaulted start date will be the date that the proxy is being established by the student.
 - 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 **CLICK ON 'E-mail Passphrase'** in order for your proxy to receive the **PROXY PASSPHRASE**. A **GREEN** check will appear once the passphrase has been emailed to the proxy.

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

▲ Collapse Mom Smith mom.smith999999@gmail.com

Profile Authorization Communication

Proxy Profile
 Please select **Parent / Legal Guardian** relationship with this proxy. The description field is your personal note about this proxy (parent, guardian, nickname). The **Passphrase** is used to determine FERPA identity for phone calls or other queries by this proxy. You must communicate the Passphrase to your proxy by clicking on the "E-mail Passphrase" icon below. You can control the Start and Stop Dates for proxy access below.

* - indicates a required field.

Relationship* Parent or Legal Guardian ▼

Description Mom

Passphrase Kittens

Start Date (MM/DD/YYYY)* 03/16/2017

Stop Date (MM/DD/YYYY)* 03/15/2022

E-mail Passphrase

Passphrase set to "Kittens"

Description set to "Mom"

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**

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

⚠ Collapse Mom Smith mom.smith999999@gmail.com

Profile Authorization **Communication**

Communication Log

This is a record of communications to your proxy.
If you have recently updated your Passphrase and there is no record listed, please return to the Profile tab and select "E-mail Passphrase".

Transmit Date	Subject	Action Date	Expiration Date	Resend
Mar 16, 2017 01:36 pm	Send updated proxy passphrase			

 [Add Proxy](#)

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*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.

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Offices of the Bursar and Financial Aid
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