

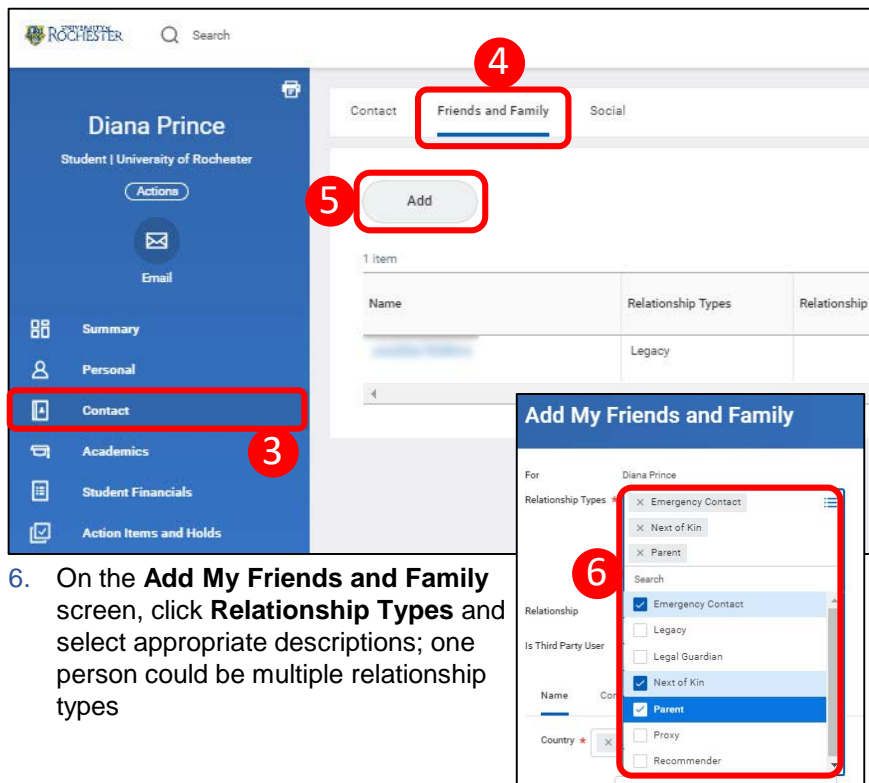
Add a Third Party Delegate (Friends & Family)

You may want someone, other than yourself, to be able to access your UR Student account. Perhaps a parent, guardian, partner or someone else will be making payments and tracking your financials while you are attending University of Rochester. Adding someone as a contact is the first step to adding a third party delegate. Follow these steps to add a contact as a third party delegate to your student account.

Add a Third Party Delegate

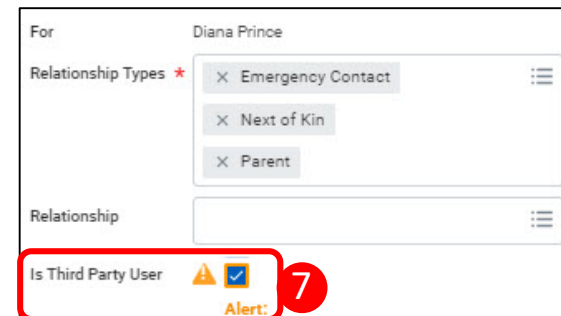
From your UR Student Home Page

1. Click your profile icon or picture (*upper right*)
2. Click **View Profile**
3. Click **Contact** (*left blue column*)
4. Click **Friends and Family**
5. Click **Add**

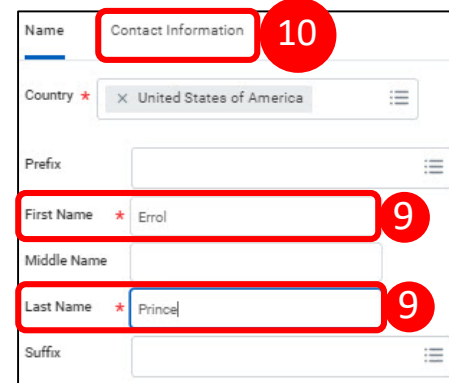


6. On the **Add My Friends and Family** screen, click **Relationship Types** and select appropriate descriptions; one person could be multiple relationship types

7. To add the person as a Third Party Delegate, check **Is Third Party User** checkbox



8. An Alert displays:
*Alert: You must still grant permissions to this third-party user. After you complete this task, access the **Manage Permissions for Third Party** task that displays on your Friends and Family profile group.*
9. Complete the person's Name; First and Last Name are required



Warning! Verify the email address is entered correctly in step 10. This address will receive a confirmation email to complete access. If not received, owner should check their spam folder.

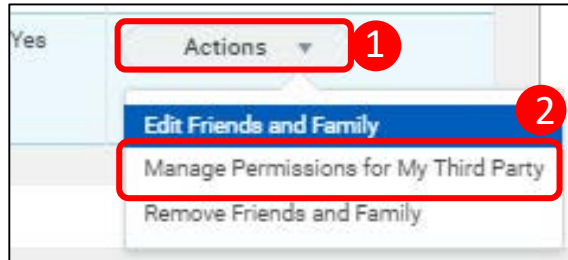
10. Click **Contact Information**, then click **Phone, Address, Email** to complete the required fields (see warning)
11. Click **OK**, then click **Done**

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Manage Permissions for Third Party

On the chart for **Friends and Family**

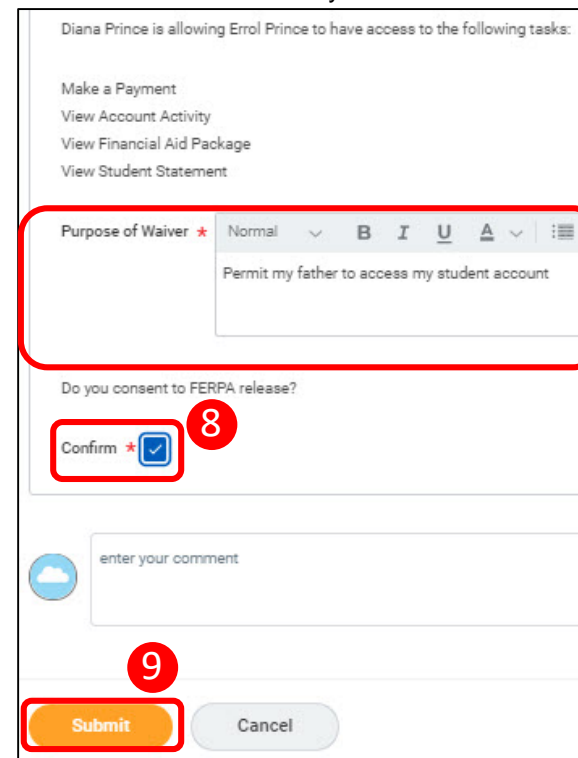
1. Click **Actions** for the person who is a Third Party Delegate for you



2. Click **Manage Permissions for My Third Party**
3. Review the **Manage Permissions** information for accuracy
4. Click **OK**
5. Review the **four Tasks Available for Third Party User**, clicking *Allowed* for the ones you want the person to be able to do:
 - a. **Make a Payment** – gives access to make a payment on your behalf
 - b. **View Financial Aid Package** – you should not activate this task! FAOnline still contains your best, most up-to-date financial aid information. Accessing this information may cause unnecessary confusion
 - c. **View Account Activity** – access to view student account transactions, including charges, payments, financial aid and refunds, details on Due Now amounts
 - d. **View Student Statement** – access to view your student statement on your behalf

Note: Only students may sign up for payment plans. Third parties may not sign up for payment plans on your behalf.
6. After Allowing the tasks, click **OK**. The tasks can be edited at any time to make changes

7. Next is the **Family Educational Rights and Privacy Act (FERPA) Release Authorization Waiver**. Read the waiver carefully, then enter the **Purpose of Waiver**. An example of what you might want to write as the Purpose of the Waiver is shown below in Step 7 on the screenshot. If you have questions regarding the purpose of the FERPA guidelines, please contact your school's registrar's office
8. Check the **Confirm** checkbox
9. Click **Submit**
10. Click **Done** on the confirmation page
11. The Third Party you designated will receive an activation message at the email address you provided. They must complete the steps in that email to be able to access your account.



Diana Prince is allowing Errol Prince to have access to the following tasks:

- Make a Payment
- View Account Activity
- View Financial Aid Package
- View Student Statement

Purpose of Waiver * Normal **B** **I** **U** **A** **☰**

Permit my father to access my student account

Do you consent to FERPA release?

Confirm *

enter your comment

Submit Cancel