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.

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

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

11. **Click OK**, then click **Done**

**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.
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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.