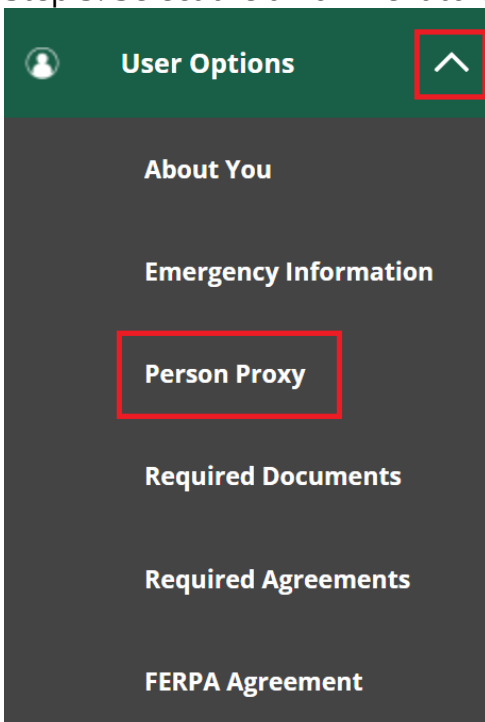| PROJECT NAME	How To Give Proxy Access	IMPACTED BUSINESS	Students
CREATED BY	Candis Brown	HOW TO	Give Proxy Access
DATE	2/8/24	VERSION	V1.0

ACCESS DEGREE CONFERRAL

Step 1. Access Elion Self-Service
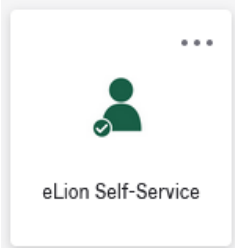
Step 2. Click the menu icon.

Step 3. Select the arrow next to User Options. Then, select Person Proxy.

Step 4. Select Add Another User

Add a Proxy

Select a Proxy

Please Select ⌄

Please Select

Add Another User

Step 5. Fill out added user's information.

First Name *	Middle Name	Last Name *
First Name	Middle Name	Last Name

Suffix	Former First Name	Former Middle Name
Please Select	Former First Name	Former Middle Name

Former Last Name	Email Address *	Confirm Email Address *
Former Last Name	Email Address	Email Address

Phone	Phone Extension	Phone Type
Phone	Phone Extension	Please Select

Birth Date	Gender	SSN
M/d/yyyy	Please Select	XXX-XX-XXXX

Confirm SSN	Relationship *	
XXX-XX-XXXX	Please Select	

Step 6. Click Complete Access or Select Access for your added user. If Select Access is clicked, click on all that you want to apply.

Access *

◯ Allow Complete Access

● Allow Select Access

☐ **Student Finance** ⓘ		☐ **Financial Aid** ⓘ
☐ Account Activity		☐ Financial Aid Home
☐ Account Summary		☐ My Awards
☐ Make a Payment		☐ FA Required Documents
		☐ Satisfactory Academic Progress
		☐ College Financing Plan

☐ **General** ⓘ		☐ **Academics** ⓘ
☐ Notifications		☐ Grades
☐ Required Documents		

☐ **Tax Information** ⓘ	
☐ Tax Information	

Step 7. Authorize the disclosure Agreement. Submit!

Disclosure Agreement

Submission of this form assumes you authorize a release of your student record.
The privacy of student records is protected by law. Saint Leo University provides for the confidentiality of student records in accordance with the Family Educational Rights and Privacy Act (FERPA), as amended. The University is prohibited from providing certain information from your student records to a third party, such as admission, enrollment, financial aid, academic, and disciplinary records. Accordingly, in order for us to be able to discuss your education record with your parents, spouse, or other persons who you designate, you must provide your authorization, the University must have submitted permission from you prior to releasing information from your educational record. "Education record" includes those records, files, documents and other material that contain information directly related to the student and are maintained by the university or a person acting for the university. An education record includes information recorded in any medium but does not include personal notes, records only available to law enforcement personnel, employment records, or medical records.
By granting access, you are giving the University to release information mentioned by you. The consent submitted must specify what information to be released.
If you wish to grant access to a third party, please indicate the name(s) and relationships(s) of the individual below.
Click here for more information and information on how to submit a paper FERPA Release form.

☑ I authorize the institution to disclose my information to this party

Cancel   **Submit**

Step 8. Parent/Proxy receives x2 system generated emails to the email address submitted, one with username and 2nd with temporary password – both emails contain link for logging.

Step 9. Parent/Proxy claims account by going to login page: Parent/Proxy Self-Service Login and entering username and temporary password.

Step 10. Have access to your student's account, parents/proxy access is available at https://www.saintleo.edu/admissions/families https://www.saintleo.edu/admissions/families and click login tile

Parent/Proxy Login

Have access to your students account, parents/proxy may login below. If you don't currently have access – please have your student provide you proxy access by following these instructions.

Parents/Proxy Login