**Step 1.** Log into your Ocean Connect account and click on Student Planning or Student Finance.





## Step 4.

≡			🛆 drobleski
	User Options · View/Add Proxy Access		
	View/Add Proxy Access		
<u>.</u>	(i) View / Add text - test		
	Active Proxies		
	(i) You do not have any designated proxies. Add one now	to allow another self-service user to view or edit your account.	
	Add a Proxy	_	
3	Add Proxy text - test		
	Select a Proxy		
	Add Another User		
	Please Select	First Name *	Middle Name
	Add Another User	First Name	Middle Name
	Last Name *	Suffix	Former First Name
	Last Name	Please Select	Former First Name

**Step 5.** Enter the Information for the individual that you would like to have self service access.

	Add Another User 🗸		
<b>↑</b>	Prefix	First Name *	Add a Proxy Middle Name
	Mrs. ~	Jane	Middle Name
	Last Name *	Suffix	Former First Name
<b>()</b> \$	Doe	Please Select ~	Former First Name
	Former Middle Name	Former Last Name	Email Address *
'S	Former Middle Name	Former Last Name	
-	Confirm Email Address *	Email Type	Phone *
		Please Select ~	
•	Phone Extension	Phone Type	Birth Date *
	Phone Extension	Please Select	12/23/1948
	Gender	SSN	Confirm SSN
	Please Select ~	SSN	SSN
	Relationship *		
	Guardian		

Guardian	
Access *	
Allow Select Access	
Student Finance (i)	🔽 Financial Aid 🚺
5 Account Activity	✓ Offer Letter
Account Summary	Financial Aid Home
Make a Payment	Correspondence Option
	Request a New Loan
	My Awards
	FA Outside Awards
	FA Required Documents
	Satisfactory Academic Progress
	College Financing Plan
General	Academics (i)
Notifications	✓ Grades

**Step 6.** Choose what type of information you would like them to be able to view: Complete access or Select Access

Guardian	
Access *	
Allow Complete Access	
Allow Select Access	
Student Finance (i)	🗌 Financial Aid 🚺
Account Activity	Offer Letter
Account Summary	Financial Aid Home
Make a Payment	Correspondence Option
	Request a New Loan
	✓ My Awards
	FA Outside Awards
Add a Proxy	✓ FA Required Documents
	Satisfactory Academic Progress
	College Financing Plan
General 🚺	Academics (i)
Notifications	Grades

**Step 7.** Acknowledge the Disclosure Agreement then click Submit

	Notifications	Grades
	Disclosure Agreement	
	Disclosure text - test	
	✓ I authorize the institution to disclose my information to this party	
	Cancel Submit	
_		
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**Step 8.** Enter your password to verify your identity

	Password Verification Please reenter your password to continue:	FA Required Documents Satisfactory Academic Progress
s reement	Cancel	Submit



Step 9. Click Continue to submit the information and confirm the proxy

Step 10. Now the Proxy should appear under 'Active Proxies'. You can edit the proxy at any time by clicking on the pencil icon

View/Add Proxy Acc	Cess			
(i) View / Add text - test				
Active Proxies				
Name	Proxy Access	Relationship	Effective Date	_
Mrs. Jane Doe	Student Finance, Financial Aid	Guardian	2/4/2020	Ø
Add a Proxy				
(i) Add Proxy text - test				
Select a Proxy				
Please Select	~			