Directions for Setting Up a Proxy

It's important you complete the Terms and Conditions of Enrollment and the Web Proxy/FERPA Consent forms online. The Web Proxy/FERPA consent allows you to designate a person(s), like a parent or guardian, to login to certain pages within your Self Service, as well to allow the University to communicate with them on the same topics. Students are required to begin this process in MyUHart. Once you have logged into MyUHart, you will find a card available to you called Web Proxy/FERPA. You must follow the steps in the correct order.

Step 1

When you click on step one, you will be asked to read and agree to the Web Proxy Agreement. Please remember that this page has valuable information about Federal law and your rights as it pertains to them. Please read carefully. At the bottom of the page, you will be asked to acknowledge that you have read and understood the agreement
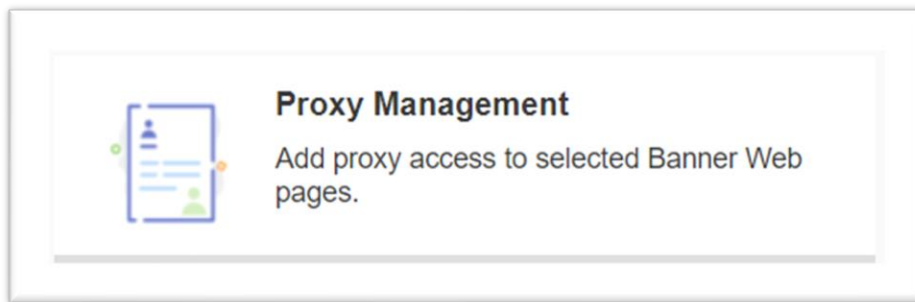

When you have completed this step, please return to your MyUHart page to move on to Step 2 of the process.

Step 2

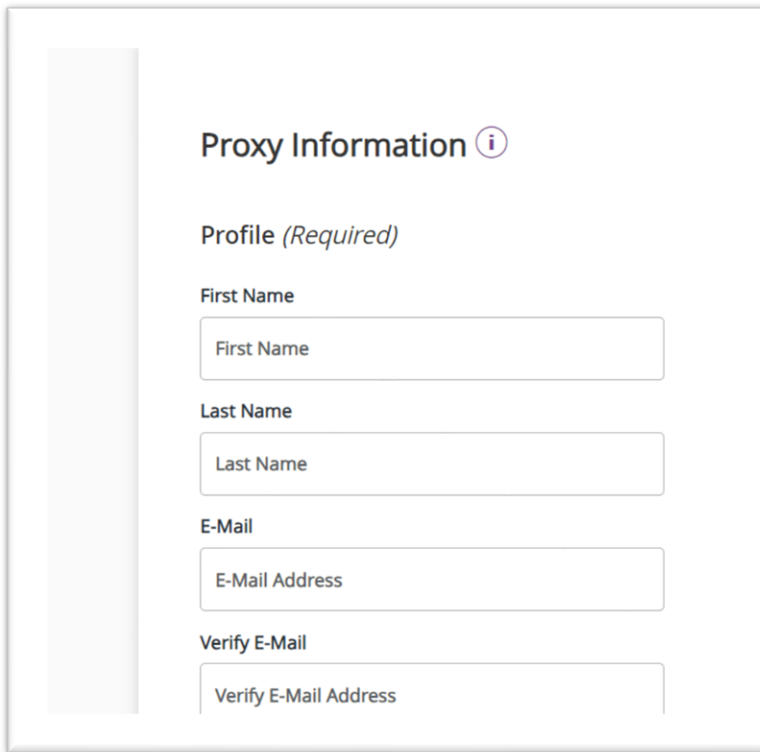Step 2 of the process will allow you add and/or update your proxy contact information.

Clicking the button will bring you to a screen where you will see a link for a feature called Proxy Management.

From there, the next screen will show you any proxies that you have already added. If this is your first time using this tool, you will begin by clicking the Add New button in the upper right-hand corner of the screen.
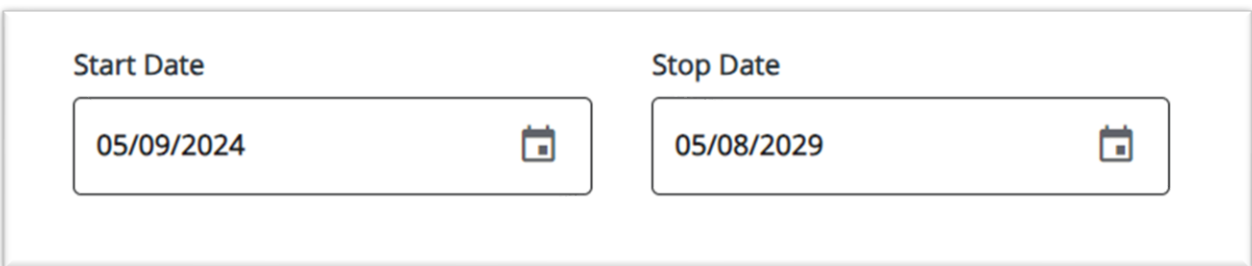
This will open the next window where you can begin to enter the required information for your proxy. Please ensure that you have your proxy's working email address before beginning. Each proxy will receive further instructions via that email address when you have completed these screens.

Proxy Information ⓘ

Profile *(Required)*

First Name

First Name

Last Name

Last Name

E-Mail

E-Mail Address

Verify E-Mail

Verify E-Mail Address

You are also required to indicate your relationship to this proxy. At this time, there is only one option and that is Parent/Legal Guardian. Please choose this regardless of the actual relationship.

Each proxy entered will have a start and an end date for their permissions. You will see that the permissions will start with the day you fill out the form and extend for 5 years. You are able to change these dates, but it is our recommendation that you make note of when the permissions will expire.

Start Date

05/09/2024

Stop Date

05/08/2029

While not required, this screen also includes an option for a description and security passphrase. The description could clarify the relationship of the proxy, "Bill Paying Parent" or "Aunt."

Passphrases

The second item under Addition Information is a passphrase. This passphrase will be requested by University staff to confirm the identify of a caller seeking to conduct business on your behalf. **If there is a passphrase listed here,** *the caller will be required to provide the passphrase before any questions will be answered.* If this field is blank, no passphrase will exist and verification will happen another way.

Additional Information

Description

> Description

Passphrase

> Passphrase

It is your responsibility to make sure that all of your proxies know your passphrase. You can email the passphrase after the proxy set up is complete.

Authorizations

The final section of the Proxy Profile will be the areas you want to authorize the proxy to see or communicate with the school about. This is a required section. Check all that apply. Click Submit.

Authorizations *(Required)* ⓘ

☐ Select All

Copy Authorizations ⓘ

> Select a Person ⌄

☐ Billing / Payment Information
☐ Academic Information
☐ Tax Notification 1098T
☐ Financial Aid Dashboard
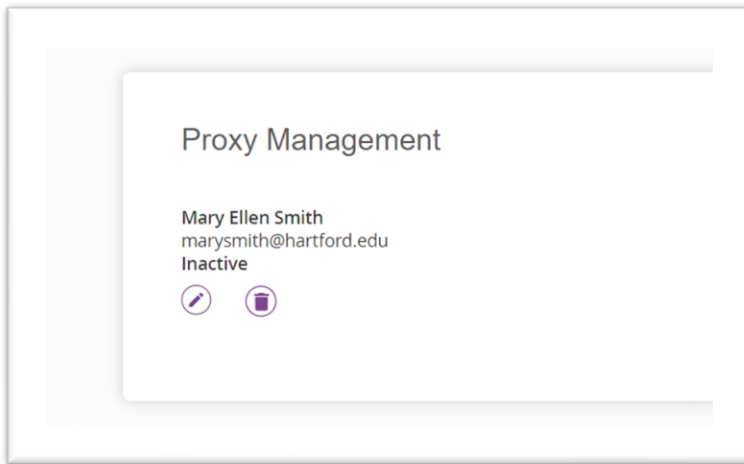☐ Financial Aid Award History
☐ Financial Aid Award Offer
☐ Residential Life
☐ Student Conduct

Cancel   Submit

This will return you to the Proxy Management pages. Please notice that directly below the name you entered, there are 4 pieces of information. You will see a full name, an email address, and the status of this proxy account.

If the proxy has not yet created their account, you will see the word Inactive under their email address.

You can click the trashcan icon under the proxy name to delete that proxy. *If they've already created their account, you cannot remove them, but you can remove all authorizations* by clicking on the pencil icon and unchecking all of the authorization options. They will get an email stating that you either deleted the relationship or updated the authorizations.

Emailing Proxy Passphrases and Password Resets

You will see a pencil and a trashcan. The pencil will allow you to edit the proxy information at any time. You can change authorizations or change your passphrase. You can also use this tool to send a reset password email to your proxy, if they have lost or forgotten their password.

You will also notice similar icons under the sections for passphrases and authorizations. By clicking on either of these icons, you will be able to send an email to your proxy to share the passphrase or to confirm the list of authorizations you have made available to that proxy.

Additional Information

Description

My passphrase

Passphrase

the quick brown fox

(✉) E-mail Passphrase

Mary Ellen Smith (marysmith@hartford.edu)   (↺) Reset Password

Authorizations *(Required)* ⓘ

☐ Select All

Copy Authorizations ⓘ

Select a Person ⌄

☑ Billing / Payment Information
☑ Academic Information
☑ Tax Notification 1098T
☑ Financial Aid Dashboard
☑ Financial Aid Award History
☑ Financial Aid Award Offer
☑ Residential Life
☑ Student Conduct

(✉) E-mail Authorizations

Cancel   Submit