

# HOW TO ADD A PROXY IN R'WEB

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## REVISION HISTORY

Version	Date	Name	Description

## INTRODUCTION AND PURPOSE

Students may give other people permission to view their student record information. Students can establish the proxy account, choose the information they have access to, and grant them permission to view information from [Student Business Services](#), [Financial Aid](#) and/or [Housing](#) and to discuss that information freely with UCR employees.

**Please Note:** R'Web Authorization & Privacy settings allow you to authorize users to DISCUSS account information with Student Business Services and other campus offices, but in order to authorize users to VIEW billing information and online payments, you must authorize them separately in the Student Account tab of R'Web where it says Student Account Online.

## IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

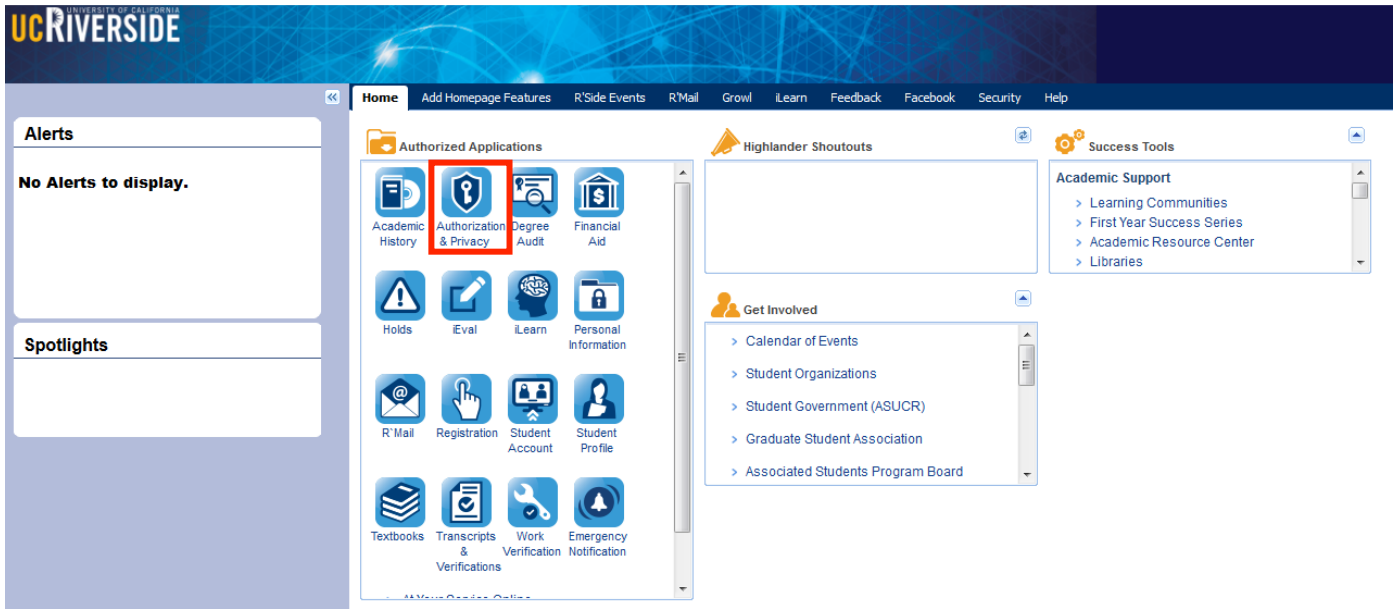
1. Students
2. Financial Aid
3. Student Business Services
4. Housing

## PROCEDURES

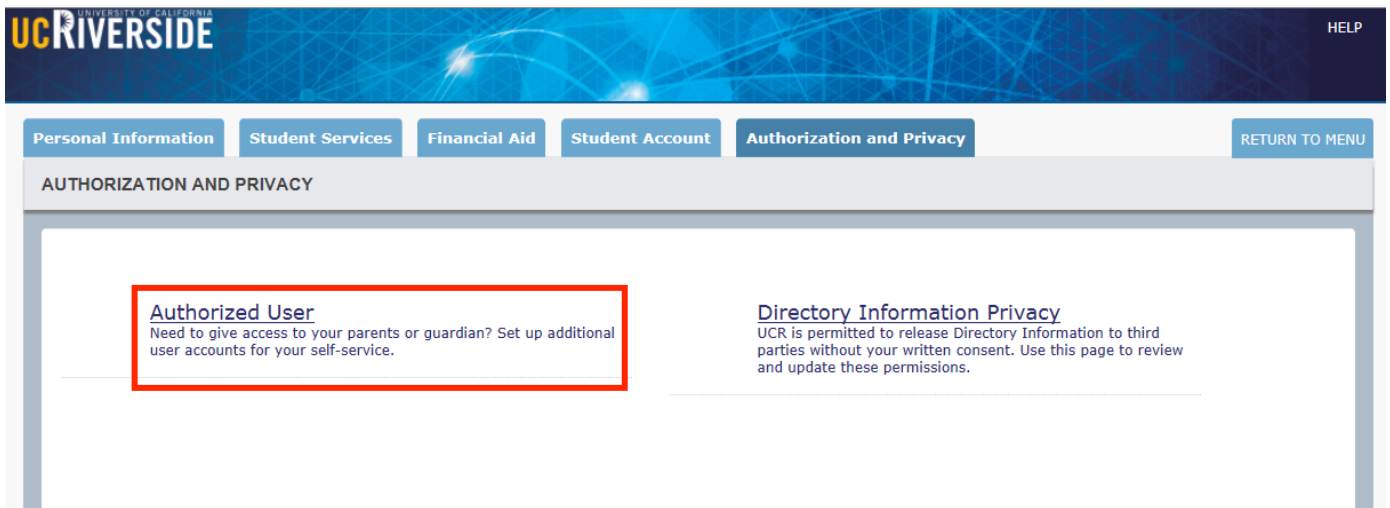
1. Go to [Rweb.ucr.edu](http://Rweb.ucr.edu).
2. Enter your UCR NetID and password.
3. Click on the **Authorization and Privacy** icon.



Authorization  
& Privacy



4. Click **Authorized User** to add and/or modify access to a proxy.




5. Click "Add Proxy".

Personal Information Student Services Financial Aid Student Account Authorization and Privacy RETURN TO MENU

### AUTHORIZED USERS

**Proxy List**  
 In general, a student's educational records are private. However, below you can grant permission to disclose your records by authorizing access to your self-service to individuals like your parents. These are known as authorized users or proxy. Select **Add Proxy** to start a new authorization or select to **Expand** a previously established user to review or modify their access.

Your proxy list is empty.

 Add Proxy

6. Enter the proxy's name and email address and click "Add Proxy".

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Your proxy list is empty.

**Add a Proxy**  
 To start the creation of a proxy, complete the profile information below. An email will be sent to the individual to verify their email address. Once that is complete you will be able to complete the authorization setup.


\* - indicates a required field.

**First Name\***

**Last Name\***


**E-mail Address\***

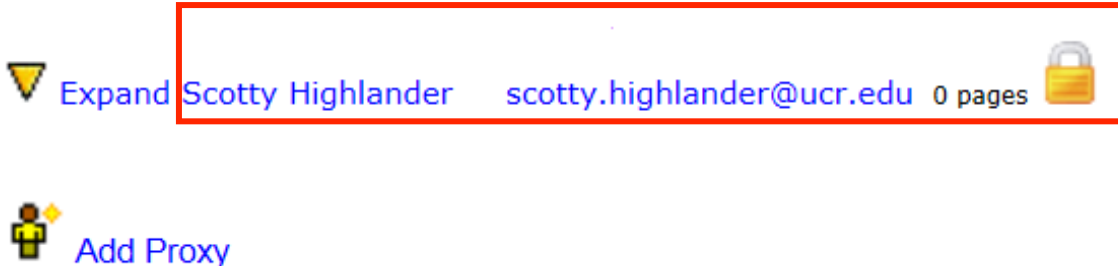
**Verify E-mail Address\***



7. You will receive a confirmation message and will also see the proxy you added is now listed with a  icon next to it. The proxy will receive an email requesting them to confirm their account.
- The subject of the email the proxy will receive is **New authorized user account**. There will be a link they need to click on or paste into their browser and a pin to log in. Then they will establish a **new numeric pin** which should be kept in a safe place.
  - Tip: Please have your proxy **notify you** once they have confirmed their account so you can complete the final steps.


A new proxy has been successfully added.

### Proxy List

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 Expand **Scotty Highlander** `scotty.highlander@ucr.edu` 0 pages 

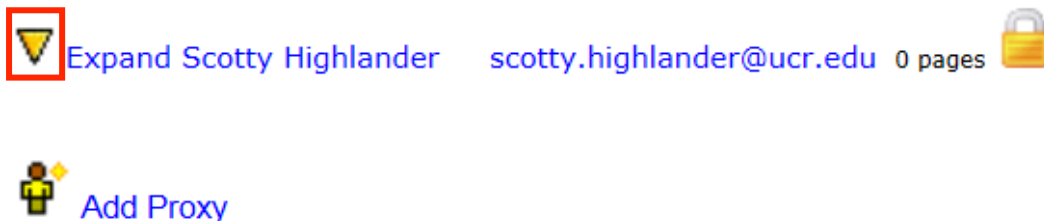
 [Add Proxy](#)



8. Click on the drop down arrow to expand the proxy's profile.


A new proxy has been successfully added.

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 Expand **Scotty Highlander** `scotty.highlander@ucr.edu` 0 pages 

 [Add Proxy](#)

9. Once expanded, please complete the following fields in their Profile
- Relationship
  - Description (i.e. dad, mom, soccer coach, company name)
  - Passphrase: your proxy this will be asked when the proxy calls Financial Aid, Housing and/or Student Business Services.
    - Click **E-Mail Passphrase** to e-mail the passphrase to your proxy.




- Profile
- Authorization

**Proxy Profile**




The proxy profile sets up the relationship, passphrase and start and stop timeframes. 1) Please select your relationship with this proxy. 2) You can choose to add a description of this proxy (dad, coach, company name). 3) The passphrase can be used to determine FERPA identity for phone calls if you authorize them to speak to Financial Aid, Housing and/or Student Business Services. En **E-Mail Passphrase**, so your proxy will receive the passphrase information via email. 4) You must provide a start and end date for the authorized access.

\* - indicates a required field.

<b>Relationship*</b>	Parent or Legal Guardian
<b>Description</b>	Brother
<b>Passphrase</b>	go UCR
<b>Start Date (MM/DD/YYYY)*</b>	10/06/2016
<b>Stop Date (MM/DD/YYYY)*</b>	04/04/2017


 **E-mail Passphrase**
←
 Reset PIN
 Delete Proxy Relationship

10. If your proxy has not verified their account yet you will see a message stating this. You cannot select their permissions until they have completed this step.

 **E-mail Passphrase**
←
 Reset PIN
 Delete Proxy Relationship

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**⚠ Your proxy has not verified their email address.**

 The proxy PIN is disabled.

**Building Authorization List**

11. Once the proxy has verified their email address, you can grant them permission to view specific items on your record. To grant the proxy specific authorizations click **Authorization**.
- Check mark each item you want the proxy to have access to.
  - Click **E-mail Authorizations** if you want the proxy to receive an e-mail detailing their authorization.
  - Use the **Copy Authorizations** drop down to copy permissions from one proxy to another.
  - Select Delete Proxy Relationship to remove access for this proxy.
  - Select Reset PIN if your proxy later forgets the PIN they chose.

- [Profile](#)
- [Authorization](#)

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\* - indicates a required field.

**Relationship\***

**Description**

**Passphrase**

**Start Date (MM/DD/YYYY)\***

**Stop Date (MM/DD/YYYY)\***

 [E-mail Passphrase](#)  [Reset PIN](#)  [Delete Proxy Relationship](#)

Description set to "Brother"

PIN expiration date: Oct 06, 2017


E-mail address verified on: Oct 06, 2016

**Page Authorization**

By placing a check mark by an information page you are authorizing this proxy to view your student record information on that page. You can select some or all of the pages. Please note that the last three pages are to authorize your proxy to be able to speak with the specific department selected via phone, email or in-person.

- Parent Access Check to Select or Deselect ALL items below.
- [View Address](#)
  - [View Ethnicity and Race](#)
  - [View Holds](#)
  - [View Test Scores](#)
  - [View Final Grades](#)
  - [View Graduation Application](#)
  - [View Billing Account Information](#)
  - [View Billing Account Summary by Term](#)
  - [View Billing Account Detail for Term](#)
  - [View Financial Aid Award Overview](#)
  - [View Financial Aid Student Requirements](#)
  - [View Financial Aid Messages](#)
  - [Speak with Student Business Services about billing information](#)
  - [Speak with Financial Aid Office about financial aid information](#)
  - [Speak with Housing Services Office about housing information](#)

[Copy Authorizations](#)

 [E-mail Authorizations](#)