

# STUDENT INTRUCTIONS FOR SETTING UP FINANCIAL AID PROXY ACCESS

## NAVIGATING TO THE PROXY MANAGEMENT PAGE IN VOYAGER

1. Login to Voyager
2. Select the **PERSONAL INFORMATION** tab
3. Select the **MANAGE VOYAGER PROXY ACCESS** tab
4. Select the **PROXY MANAGEMENT** link

Personal Information	Alumni	Student Services	Employee Services	Surveys	Registrar
Update Telephone and Emergency Contact Information For current students only	View Address(es), Phone(s) and Social Security Name	View E-mail and Website Address(es)	View Emergency Contact(s) For current students, faculty and staff only		
Permanent Academic Record and Other Information For current students only; confirm key record information; view ID picture	How to Change Personal Information	View Ethnicity/Race	Register Your Vehicle or Bicycle View and maintain your vehicle and bicycle registration		
Volunteer Hours Record your volunteer hours with the Volunteer and Community Service Center and view a log of your volunteerism	Manage Voyager Proxy Access Manage Voyager Proxy Access	STUDENTS ONLY - Maintain Contact Information Addresses, phone, e-mail	STUDENTS ONLY - Health Information		
■ Proxy Management					

## FIVE STEPS TO ADD A FINANCIAL AID PROXY

1. Select **ADD PROXY**.

### Proxy Management

Expand a proxy to define relationship type, begin and end dates, and authorizations.

Your proxy list is empty.

[Add Proxy](#)

2. Enter the first name, last name, and email address of the person to whom you want to give access and click **ADD PROXY**.

### Proxy Management

Expand a proxy to define relationship type, begin and end dates, and authorizations.

Your proxy list is empty.

Add a new proxy using the form below. Then edit their profile and authorization settings to enable appropriate access.

\* - indicates a required field.

First Name\*

Last Name\*

E-mail Address\*

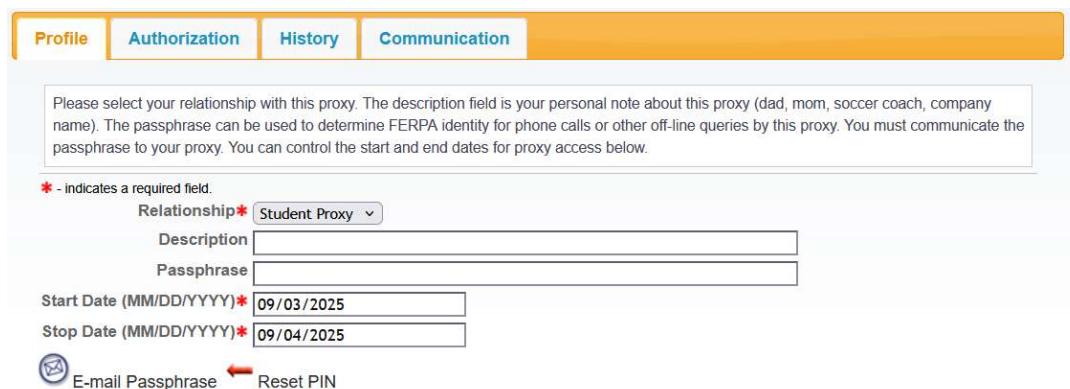
Verify E-mail Address\*

After you click the **ADD PROXY** button, this will initiate the set-up process by sending an email to your proxy with the login instructions and temporary password. An email will also be sent to your LU email address to confirm the proxy you added.

**\*\*\* IMPORTANT\*\*\* The proxy you added will NOT have access or authorization to any information until you complete steps 3 through 5 below.**

3. Click on your proxy's name to expand the proxy information.

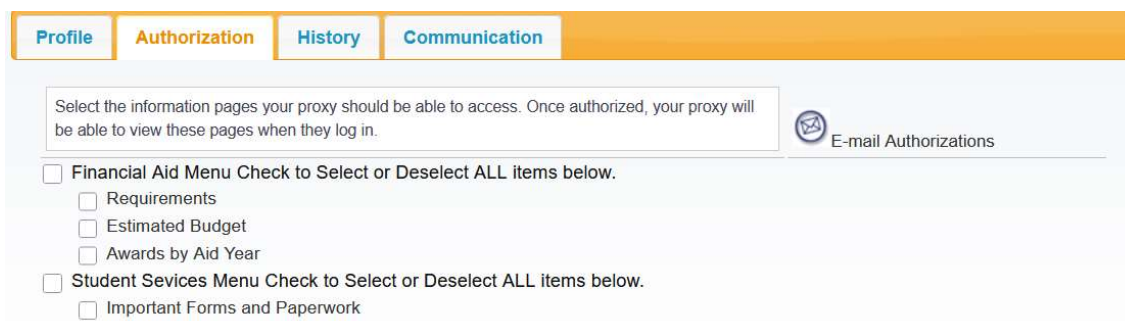
4. Complete your proxy's profile.



The screenshot shows the 'Profile' tab of a proxy management interface. At the top are four tabs: Profile, Authorization, History, and Communication. Below the tabs is a text box with instructions: 'Please select your relationship with this proxy. The description field is your personal note about this proxy (dad, mom, soccer coach, company name). The passphrase can be used to determine FERPA identity for phone calls or other off-line queries by this proxy. You must communicate the passphrase to your proxy. You can control the start and end dates for proxy access below.' Below this is a legend: '\* - indicates a required field.' The form fields include: 'Relationship' (a dropdown menu set to 'Student Proxy'), 'Description' (a text input field), 'Passphrase' (a text input field), 'Start Date (MM/DD/YYYY)\*' (a date picker set to '09/03/2025'), and 'Stop Date (MM/DD/YYYY)\*' (a date picker set to '09/04/2025'). At the bottom left is an 'E-mail Passphrase' button with an envelope icon, and at the bottom right is a 'Reset PIN' button with a red arrow icon.

- **RELATIONSHIP:** Student Proxy
- **DESCRIPTION:** Enter a relationship description of the proxy to you (mother, father, etc.)
- **PASSPHRASE:** Entering a passphrase and click **E-MAIL PASSPHRASE**. This will generate an email to the proxy notifying them of the passphrase. They can then use this passphrase to identify themselves as an approved proxy when calling the Financial Aid office.
- **START & END DATE:** These will appear automatically; however, you can change them if you want the proxy's access to start on a later date or end on a specific date. The stop date can be updated at any time if you want to end the proxy being able to access your record.

5. Select the **AUTHORIZATION** tab to complete the proxy process. **Your proxy will only have access to the options you select.**



The screenshot shows the 'Authorization' tab of the proxy management interface. At the top are four tabs: Profile, Authorization, History, and Communication. Below the tabs is a text box with instructions: 'Select the information pages your proxy should be able to access. Once authorized, your proxy will be able to view these pages when they log in.' To the right of this text box is an 'E-mail Authorizations' button with an envelope icon. Below the text box are two main sections, each with a checkbox and a list of sub-items:

- ☐ Financial Aid Menu Check to Select or Deselect ALL items below.
  - ☐ Requirements
  - ☐ Estimated Budget
  - ☐ Awards by Aid Year
- ☐ Student Services Menu Check to Select or Deselect ALL items below.
  - ☐ Important Forms and Paperwork

**NOTE: You are finished once you have selected your authorization(s). There is no save button.**