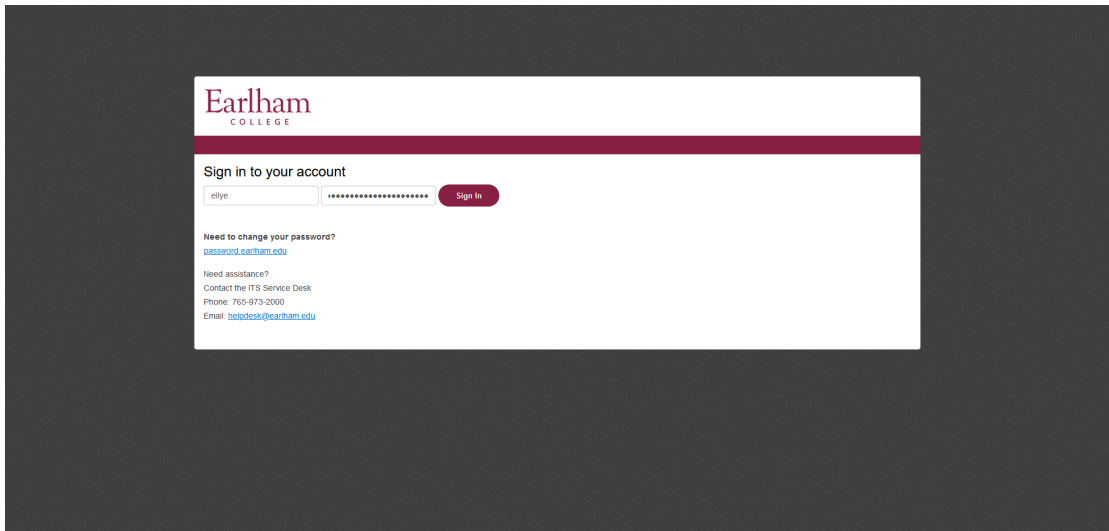
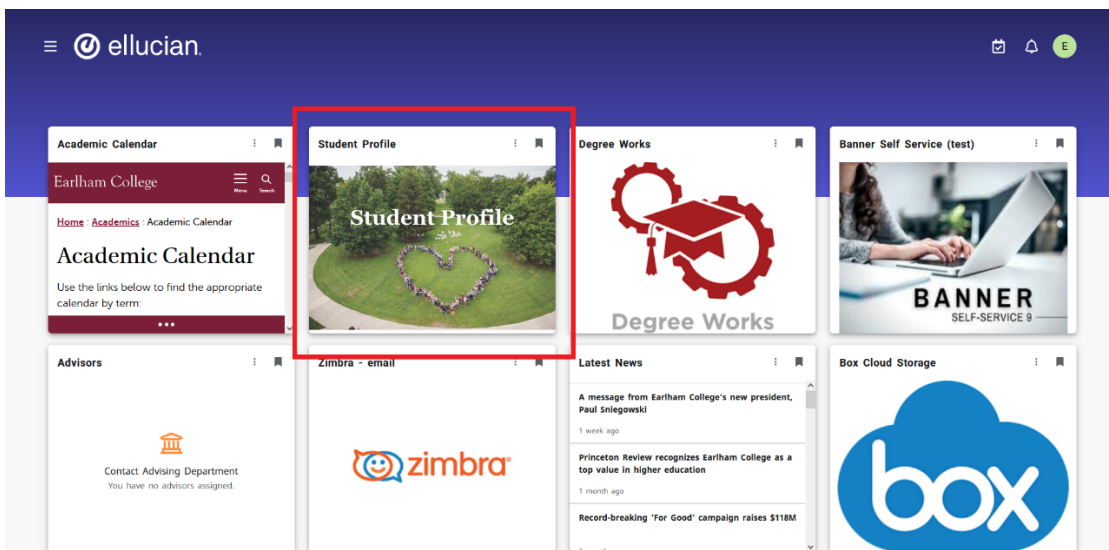


Creating a Proxy

- 1.) Login to TheHeart: <https://experience.elluciancloud.com/ecaesor686/>



- 2.) Find and click on the 'Student Profile' card.



3.) Click 'Proxy Management' at the bottom left of the screen.

The screenshot shows the Earlham Student Profile page for Ely I (000000284). The page is divided into several sections: a left sidebar with navigation links, a main content area with student details, and a right sidebar with additional information. The 'Proxy Management' link in the left sidebar is highlighted with a red box. The main content area displays student information such as Date of Birth, Ethnicity, Race, and General Information. The right sidebar shows sections for Post Secondary Education and TESTING, both of which indicate 'No data available'.

4.) Click 'Add New'

The screenshot shows the Earlham Proxy Management page. The page has a header with the Earlham logo and a user profile icon. The main content area is titled 'Proxy Management' and contains a message: 'There are no proxies available for you to view. Click Add New to add a proxy.' The 'Add New' button in the top right corner is highlighted with a red box. The footer of the page contains the copyright information: '© 2013-2023 Ellucian Company L.P. and its affiliates. All rights reserved.'

- 5.) Enter requested personal information of parent/guardian. The email address entered here will be your Proxy's username. **IMPORTANT:** Earlham College CAN NOT provide FERPA information over the phone to a Proxy without your authorization and the passphrase entered.

Earlham

Proxy Management • Proxy Information

Proxy Information ⓘ

Profile (Required)

First Name

Last Name

E-Mail

Verify E-Mail

Relationship ⓘ

Start Date

Stop Date

Earlham

Proxy Management • Proxy Information

Verify E-Mail

Relationship ⓘ

Start Date

Stop Date

Additional Information

Description

Passphrase

Authorizations (Required) ⓘ

- 6.) Once you select the 'Relationship' type, you will be given a list of authorizations to choose from. The authorizations you choose (if any) is completely up to you. You are responsible for managing your Proxy(s) authorization access. You can make changes at any time.

Earlham
Proxy Management » Proxy Information

Additional Information

Description
Description

Passphrase
Passphrase

Authorizations (Required)

Select All

Copy Authorizations
Select a Person

Academic Transcript
 Account Summary
 Student Profile
 Tax Notification 1098T
 Student Grades
 Award History
 Student Detail Schedule
 Financial Aid Status
 Student Holds

Cancel Submit

- 7.) When all of required information is entered, hit 'Submit'. Your Proxy will be emailed all the necessary information for account setup along with an email containing their Passphrase.
- 8.) After submission, you will be taken back to the Proxy Management Main Page. From here you can add additional Proxys, edit existing Proxys, or delete Proxys.

Earlham
Proxy Management

Proxy Management Add New

Test Earlham Test Parent
Test Parent@gmail.com

✓ i

- 9.) Click on the 'Edit' icon

Earlham
Proxy Management

Proxy Management Add New

Nick Ervin
Nick Ervin@gmail.com
Inactive

✓ i

10.) Click the 'Email Passphrase' link. ***This step is optional, HOWEVER, without this step your Proxy will be unable to request FERPA information over the phone.***

The screenshot shows the Earlham Proxy Management interface. The header includes the Earlham logo and navigation links for Proxy Management and Proxy Information. The main content area is titled 'Proxy Information' and contains several sections:

- Relationship:** A dropdown menu set to 'Parent or Legal Guardian'.
- Start Date:** A date field set to '08/27/2024'.
- Stop Date:** A date field set to '02/23/2025'.
- Additional Information:**
 - Description:** A text field containing 'Parent'.
 - Passphrase:** A text field containing 'Test Phrase'.
 - E-mail Passphrase:** A radio button option that is selected and highlighted with a red box.
- Authorizations (Required):**
 - A 'Select All' checkbox.
 - A 'Copy Authorizations' dropdown menu set to 'Select a Person'.
 - A list of checkboxes for various data types: Account Summary, Student Profile, Tax Notification 1098T, Student Grades, and a partially visible '-----'.

If encounter any errors, please contact Earlham ITS at 765-973-2000 or at helpdesk@earlham.edu