

How to Grant Access to Authorized Users to the Financial Aid Portal

To view awards and grant permission to parents, guardians, or authorized users to the financial aid portal, you must first activate your NetID. If you have not activated your NetID, <u>please click</u> <u>here</u>.



1. Log into your myRutgers account with your NetID and password.

2. Click the Settings icon on the left navigation bar.

	R My Notifications
	Active History NetID: RUID: Email: You're all caught up!
SETTINGS	STUDENT Drainge Parswords Directory Privacy Directory Privacy Directory Directory Privacy Directory
	Student



3. In settings, scroll to the Security section and click "Authorized Access."

App Settings		
App Settings		
Logout		
Log user out	Ð	
App Info Build Information for the app	>	
Dashboard Settings Update totolais and more	>	
Dark Mode Change appearance of dashboard		
Maps Auto Select Automatically use the nearest bus stop		
Security		
Authorized Access Set up other users to view your account	>	
Device Managment Configure what devices can access the app	>	
	App Info Build Information for the app. Dashboard Settings Update totoviali and more Dark Mode Change appearance of dashboard Dark Mode Auto Select Automatically use the nearest built stop	App In0 Build information for the ago Dashboard Settings Update tutoritial and more Dark Mode Charpe appearance of dashboard Dark Mode Charpe appearance of dashboard Maps Auto Select Automatically use the measest bus stop Securitys Listorized Access Set use other users to view your account Device Managment Origuer what devices can access the app

4. This will take you to the "My Authorized Users" page. If you don't have any authorized users added, it will look like this:

	ACTIVE		
	No Activ	e Usera.	
ADD A USER			

Note: You can only have 3 active authorized users who can view/modify your account.

5. To add a user, click the Add a User button.

	ACTIVE	BAGTIVE	
	No Acti	e Users.	
ADD A USER			
ADD A GLEA			



6. A confirmation message will pop up notifying you that it is <u>your</u> decision who can/cannot have access to your financial aid portal and that you are providing your consent to allow Rutgers to disclose information regarding your educational and/or financial aid as authorized by you in the following screens. Check the box to confirm and then click *confirm*.



Note: If you do not want an authorized user (like a parent/guardian) to have access to your financial aid information, you do not have to add a user and can click cancel.

7. After confirming, you will be directed to the "Add a New Authorized User" form. Fill out the form for the person you are granting access to (their name, email, relationship to you, etc.) and create a 4-digit pin code they will use to verify their identity when calling or visiting university departments for assistance regarding information they have been authorized to view.

Add a New Authorized User		×	Parent/Guardian
First Name Jane	Last Name Doe		Spouse/Partner
Emel jdoe123@email.com	Parent/Guardian		Employer
PIN 1234	Access Expiration 01/11/2029		Sponsor
Dashboard Items: Authorize to view & dis Registrar Records (includes current/past	scuss students information at courses, grades, major, GPA, degree ore	edita)	Other
Student Accounting Records (include	es account balance, email reminders and	l viewing/paying online)	
Financial Aid Records (Two access per	rmission levels.)		
Custodial (Upload documents & view	w financial aid information.)		
O Read Only (View financial aid inform	nation only.)		
Non-Dashboard Items: Authorize to discu	uss student's information		
Dean of Students (no information will be	e displayed, discussion purposes only)		
Judicial Affairs (no information will be di	isplayed discussion purposes only)		
Residence Life (no information will be dia	splayed, discussion purposes only)		
Contraction of the second s			



- 8. In the dashboard items section, check the box next to "Financial Aid Records," then decide what level of permission you'd like to give your authorized user.
 - a. If you want a parent/guardian to be able to submit and sign documents in the financial aid portal, please grant them *custodial* access.

First Name		Last Name	
Jane		Doe	
Emeil jdoe123@email.com	0	Relationship Parent/Guardian	
PIN 1234	0	Access Expiration 01/11/2029	0
Registrar Records Encludes curr Student Accounting Records	rent/past cou {includes acc	rses, grades, major, GPA, degree credits) sount balance, email reminders and viewing/paying o	nline)
Registrar Records (incluides cur Student Accounting Records Financial Aid Records (Two acc	rent/past.cou (includes.act cess.permiss	rses, grades, major, GPA, degree credits) iount balance, email reminders and viewing/paying o ion levels.)	nline)
Registrar Records (incluides curr Student Accounting Records Financial Aid Records (Two act Ocustodial (Upload document	rent/past cou (includes acc cess permiss its & view fina	rses, grades, major, GPA, degree credits) iount balance, email reminders and viewing/paying o ion levels.)	nline)
Registrar Records (includes curr Student Accounting Records Financial Aid Records (Two acc Custodial (Upload documen Read Only (View financial a)	rent/past cou (includes acc cess permiss its & view fina id information	rses, grades, major, OPA, degree credits) sount balance, email reminders and viewing/paying o on levels.) ncial aid information.)	nline)
Registrar Records (incluides curred) Student Accounting Records Financial Aid Records (Two acc O Custodial (Upload documen Read Only (View financial a) ton-Dashboard Items: Authorize te Dean of Students (no information	rent/past cou (includes act cess permiss its & view fina id information o discuss i on will be disp	rses, grades, major, GPA, degree credits) count balance, email reminders and viewing/paying o on levels.) notal aid information.) conly.) atudent's information layed, discussion purposes only)	nline)
Registrar Records (incluides curred) Student Accounting Records Financial Ald Records (Two acc Custodial (Upload documen Read Only (View financial al Non-Dashboard Items: Authorize to Dean of Students (no information Judicial Affairs (no information	(includes acc cess permise its & view fina id information o discuss s on will be display will be display	rses, grades, major, GPA, degree credits) count balance, email reminders and viewing/paying o ion levels.) ion levels.) ion ly,) student's information layed, discussion purposes only) ed. discussion purposes only)	nline)

b. If you want a parent/guardian to have access to only view your financial aid portal, but not submit or sign documents, please grant them *read only* access. Note: read only access does not provide the ability to submit or sign documents.

First Name	Last Name		
Jane	Doe		
Emel jdoe123@email.com	Parent/Guardian		
PIN 1234	Access Expiration 01/11/2029	Ø	0
Registrar Records (Include Student Accounting Record	s current/past courses, grades, major, GPA, degree credits)	avino o	nlina)
Registrar Records Enclude Student Accounting Recor Financial Aid Records (T) O Custodial (Uplead doc	s ourrent/past courses, grades, major, GPA, degree credits) (includes account balance, email reminders and viewing/p io access permission levels.)	aying o	nline)
Registrar Records (Include Student Accounting Record Financial Aid Records (T) Oustodial (Upleed doc Read Only (View financial)	s current/past courses, grades, major, GPA, degree credits) (includes account balance, email reminders and viewing/p io access permission levels.) ? urments & view financial aid information.) sial aid information only.)	aying o	nline)
Registrar Records (Include Student Accounting Record Financial Aid Records (T) Custodial (Upleed doc Read Only (Vrew finan Non-Dashboard Items: Author Dean of Students (no info	s current/past courses, grades, major, GPA, degree credits) (includes account balance, email reminders and viewing/p io access permission levels.) () urments & view financial aid information.) cal aid information only.) cat to discuss student's information mation will be displayed, discussion purposes only)	aying o	nline)
Registrar Records (Include Student Accounting Recor Financial Aid Records (T) Custodial (Uplead doc @ Read Only (View finan Non-Dashboard Items; Author Dean of Students (no info- Judicial Affairs (no inform)	s current/past courses, grades, major, GPA, degree credits) (includes account balance, email reminders and viewing/p ico access permission levels.) (includes account balance, email reminders and viewing/p uments & view financial aid information.) (al aid information only.) (al aid information only.) (bit of isplayed, discussion purposes only) (bit on will be displayed, discussion purposes only).	aying o	nline)

Note: While this guide specifically goes over how to grant access to financial aid records, you can also click any of the other Dashboard Items or Non-Dashboard Items that you wish your authorized user to have access to.



- 9. Click Submit.
- 10. This will redirect you back to the "My Authorized Users" page where you will see confirmation that your authorized user has been granted access, their 4-digit pin, and, specifically, what they have access to.

My Authorized	Users		
	ACTIVE	INACTIVE	
	You can only have at most 3 active users. T	o view your list of inactive users click on the inactive tab.	
	Jane Doe Parent/Guardian	Has Access to: Registrar Records Student Accounting Records Financial Ad Records (Keywe 01/11/2022) (POR 1534) (Karwa 01/11/2022)	
ADD A USER			

11. Your authorized user will receive an email with instructions how to create a CommunityID, log into the myGuest dashboard, and how to use their 4-digit pin.

RUTGERS
Hi Jane Doe,
has granted you authorized user access to view student information on the myGuest Dashboard. Authorized user access allows you to view specific student information on the myGuest Dashboard depending on the access levels authorized by the student.
First, you will need a CommunityID account to access the myGuest Dashboard. Please visit Register CommunityID to create a CommunityID account.
Once your CommunityID account is ready, please visit the <u>myGuest Dashboard</u> and follow the steps below:
Click on the CommunityID Login icon (top right).
Please use the following email address: jdoe123@email.com to log in.
A few friendly reminders:
 Any document(s) submission and course registration must be done by the student.
 If granted access, the authorized user will receive email billing reminders, can view the term bill and make payments on the student's behalf.
 Authorized users need to use their four-digit PIN when calling or visiting university departments for assistance regarding teh information they have been authorized to view. Rutgers University administrators will validate the PIN and the authorized user's access before speaking with the individual to protect the rights of the students. PIN information is displayed when logging into the <u>myGuest</u> <u>Dashboard</u>.
Sincerely,
myGuest Dashboard Implementation Team
Please do not reply to this email. This email has been sent from an unmonitored email account.



12. To add another user, click the "Add A User" button and repeat steps 6-10. The button will be disabled once you reach the maximum of 3 active authorized users.

13. To update the PIN, Expiration Date, or modify any access permissions, click the pencil icon.

My Authorized	Users		
	ACTIVE	INACTIVE	
	You can only have at most 3 active users. T	o view your list of inactive users click on the inactive	tab.
	Jane Doe Parent/Guardian	Has Access to: Registrar Records Student Accounting Records Financial Aid Records (Exerces 01/11/2029)	V1234)