

Granting 1098-T access to Authorized User(s)

- Click on Authorized Users in the left column under My Profile Setup

The screenshot shows the University of Puget Sound student portal. At the top, the university logo and name are on the left, and the user is logged in with a name and a 'Logout' link on the right. A navigation bar contains links for 'My Account', 'Make Payment', 'Payment Plans', 'Deposits', 'Refunds', and 'Help'. The main content area is divided into several sections:

- Announcement:** A section titled 'Do you have a Credit Balance?' with instructions on how to interpret account balances. It includes two 'View Account' boxes: one showing a balance of -\$662.58 with a callout 'Minus = No Payment needed' and another showing a balance of \$1,658.10 with a callout 'No minus = Payment Due'. Below this is a 'Go Loggers!!' link.
- Payment Profile:** A yellow box with a callout 'Click to Access or Add an Authorized User' pointing to the 'Authorized Users' link in the 'My Profile Setup' menu. It contains instructions on saving time by setting up a payment profile and signing up for direct deposit.
- Express Pay:** A dark red box with a 'Select Option' dropdown and a 'Go!' button.
- View Account:** A box showing a balance of \$162.20 and a 'View Activity' button.
- Statements:** A box showing 'Your latest eBill Statement (3/5/18) Payment due March 15th: \$1.09' and a 'View' button.
- My Profile Setup:** A vertical menu on the right with links for 'Authorized Users', 'Payment Profile', 'Consents and Agreements', 'Electronic Refunds', and 'Notifications'. The 'Authorized Users' link is circled in red.

At the bottom, the footer contains the copyright notice '©2018 TouchNet® A Global Payments Company | All rights reserved. | Privacy Statement' and the 'Secured by touchnet' logo.

- If no Authorized User is setup the student will be prompted to add a new authorized user:

UNIVERSITY of PUGET SOUND

Logged in as: [redacted] | Logout

My Account Make Payment Payment Plans Deposits Refunds Help My Profile

Authorized Users

From this page, you can give others (parents, employers, etc.) the ability to access your account information. In compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), your student financial records may not be shared with a third party without your written consent. Adding an authorized user is your written consent that an individual may view your account information and make payments on your behalf. Please note that authorized users DO NOT have access to your stored payment methods, academic records, or other personal information.

Add Authorized User

Click to add a new Authorized User

- enter the email address of the authorized user designate, select which item(s) the authorized user will be able to view and click continue

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Logged in as: [redacted] | Logout

My Account Make Payment Payment Plans Deposits Refunds Help My Profile

Authorized Users

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Add Authorized User

Email address of the authorized user

Would you like to allow this person to view your billing statement and account activity?

Yes No

Would you like to allow this person to view your 1098-T tax statement?

Yes No

Would you like to allow this person to view your payment history and account activity?

Yes No

Cancel

Continue

- An Agreement to Add Authorized User should display. Check I Agree box and Continue

✕

Agreement to Add Authorized User

The e-mail address you provided already exists in our system and is registered to Nathan Grosse. This indicates that Nathan Grosse was or may still be a registered user in our system. Please ensure that this is the person to whom you wish to give access. If you have any doubts that this is the correct person, please press the 'Cancel' button.

I hereby authorize **University of Puget Sound** to grant [redacted] full access to my accounts, including ability to view all billing statements, payment history, and/or make payments accordingly. My payment methods and credit card and/or checking account information will remain confidential and hidden from all other users. I understand that I am still primarily responsible for ensuring that all my accounts are paid on time and in full.

This agreement is dated Friday, April 27, 2018.

For fraud detection purposes, your internet address has been logged:
207.207.127.235 at 4/27/18 9:14:55 AM PDT

Any false information entered hereon constitutes as fraud and subjects the party entering same to felony prosecution under both Federal and State laws of the United States. Violators will be prosecuted to the fullest extent of the law.

Please check the box below to agree to the terms and continue.

I Agree Must check to continue

Cancel Print Agreement Continue

- Confirmation the Authorized User has been sent an email notification concerning being granted account access should display

Logged in as: [redacted] | [Logout](#)

Home My Account Make Payment Payment Plans Deposits Refunds Help
My Profile

Authorized Users

- Thank you. We have sent an e-mail notification to this person
- (Note: Authorized users have their own login ID's and passwords)

Confirmation Authorized User has been added

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Authorized Users
[Add Authorized User](#)

If you delete an authorized user, that person can no longer make payments to your accounts in this system. All of that person's upcoming or unapplied scheduled or automatic payments will be canceled.

Full name	Email address	Action
[redacted]	[redacted]	⚙️

Authorized User's name and email will display here

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- The new Authorized User should now be listed under the Current Authorized Users


Authorized Users

Updated settings for authorized user

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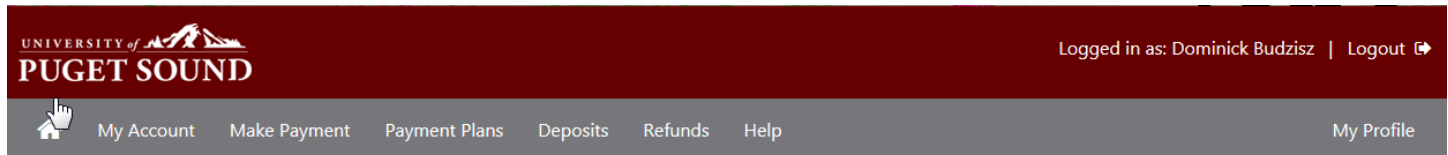
[Authorized Users](#) [Add Authorized User](#)

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Full name	Email address	Action
<input type="text" value="Authorized User Name"/>	<input type="text" value="Authorized User Email address"/>	

If Authorized User(s) already exists:

- Click on the Cog under Action and select Edit



UNIVERSITY of PUGET SOUND

Logged in as: Dominick Budzisz | Logout


My Account Make Payment Payment Plans Deposits Refunds Help My Profile

Authorized Users

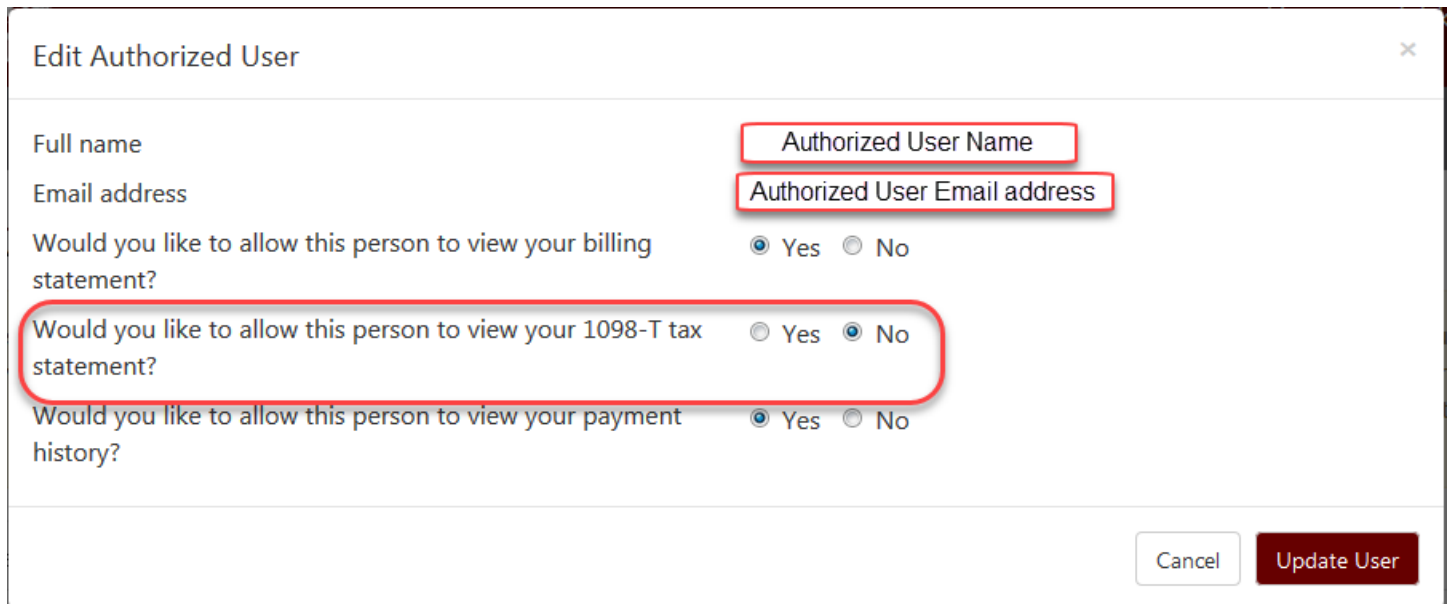
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Authorized Users [Add Authorized User](#)

If you delete an authorized user, that person can no longer make payments to your accounts in this system. All of that person's upcoming or unapplied scheduled or automatic payments will be canceled.

Full name	Email address	Action
		 <div>Click Edit to change Authorized User permissions</div> <ul style="list-style-type: none">EditDeleteShow Agreement

- Student will receive a list of items they can allow authorized users to view



Edit Authorized User

Full name

Email address

Would you like to allow this person to view your billing statement? Yes No

Would you like to allow this person to view your 1098-T tax statement? Yes No

Would you like to allow this person to view your payment history? Yes No

- Click yes radio button to allow 1098-T access
- Select Update User to save changes