Granting Third-Party Access
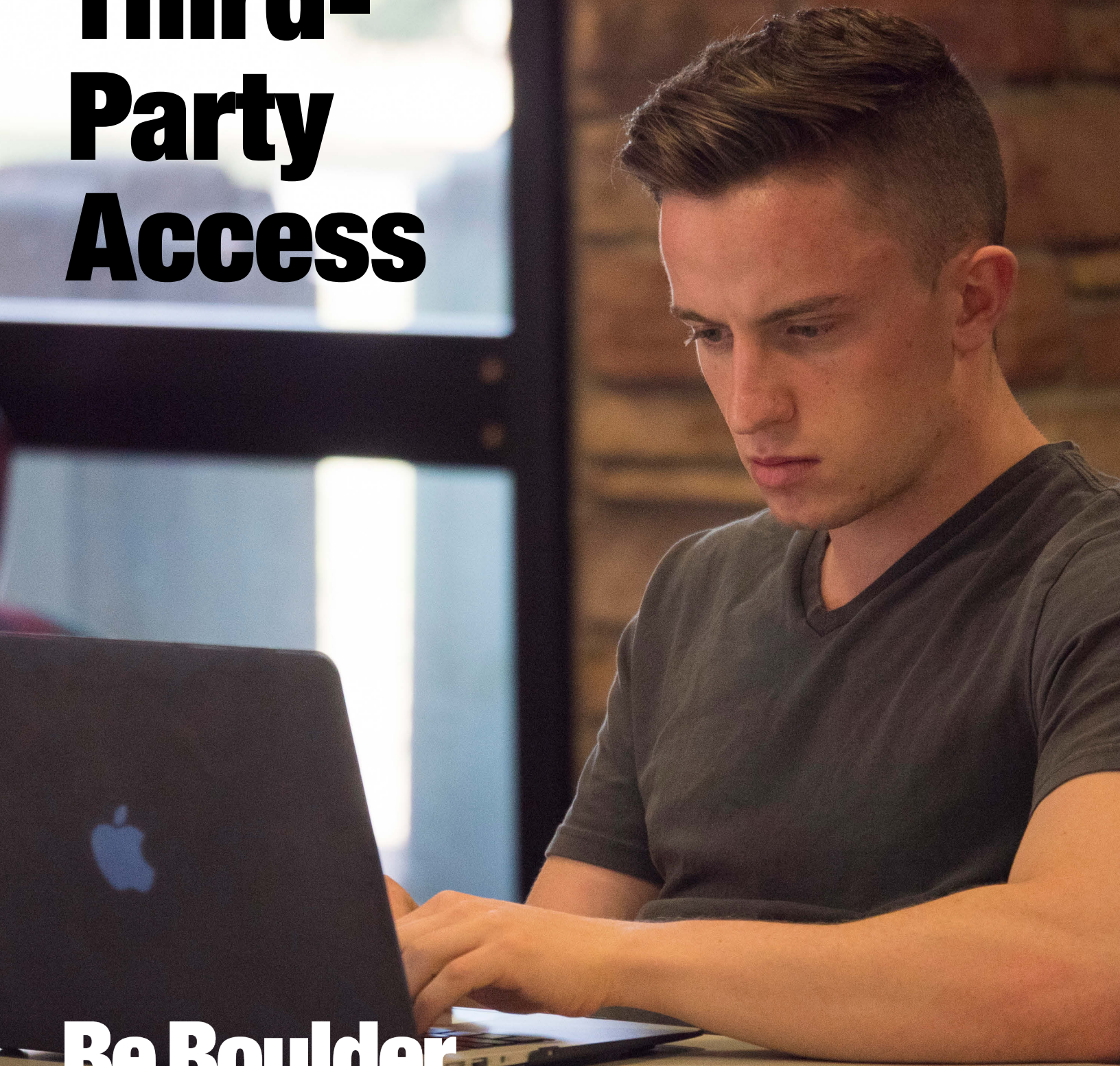
Be Boulder.

CU Office of the Registrar
UNIVERSITY OF COLORADO BOULDER

Table of Contents

About Third-Party Access

FERPA Protections

At the post-secondary level, the right to inspect a student's education records is limited to the student and governed by the [Family Education Rights and Privacy Act of 1974](#) (FERPA). Records may be released to a parent or other third party only under the following circumstances:

- Through the consent of the student via FERPA consent to release ([page 4](#))

- in compliance with a subpoena

- by submission of evidence that the parents declare the student as a dependent on their most recent Federal Income Tax form ([IRS Code, Section 152](#)) ([Parent Affidavit](#))

- under the alcohol and controlled substance exception or in connection with a health and safety emergency under the circumstances set forth in § 99.36 (if the student is under 21 years of age)

Granting Records Access

If you'd like to give a parent or other third party access to view some or all of your FERPA-protected records at CU Boulder, you'll have to submit one or more authorizations.

To grant an individual or organization access to your education records, you have two options: FERPA consent to release ([page 4](#)) and CU guest access ([page 17](#)).

To grant access to your medical, student conduct or housing records, visit the following webpages:

- [Release of Medical Information](#)
- [Student Conduct Confidentiality & Notification Policy](#)
- [Housing and Dining Services](#)

To learn more about how FERPA applies to third-party access to your education records, visit our [Third-Party Access webpage](#).

FERPA Consent to Release

What It Is

FERPA consent to release allows a parent or authorized third party to contact the university on your behalf about your academic or financial records.

When establishing access, you authorize university officials to discuss, disclose or release one or more specific types of education records to that person or organization:

- **All Education Records** – Includes any and all academic, financial and personal information

- **Academic Record Only** – Includes, but is not limited to, GPA, grades, degree progress, academic standing, academic holds, class schedule, transcript requests, academic advising

- **Financial Record Only** – Includes, but is not limited to, financial aid (limited per Gramm-Leach-Bliley Act of 1999), account (billing/payments), financial holds, tuition classification, COF

Note: Release of student health, housing and/or student conduct information must be requested through the campus department that maintains those records.

You may grant access to an unlimited number of guests, and the record items you select can be unique for each guest. You may assign, modify or revoke access at any time.

What It Isn't

FERPA consent *does not* include access to your medical, student conduct or housing records. To authorize access to those records, see:

- Release of Medical Information

- Student Conduct Confidentiality & Notification Policy

- Housing and Dining Services

In addition, FERPA consent *does not* provide online access to your education records. That authorization requires CU guest access (page 17).
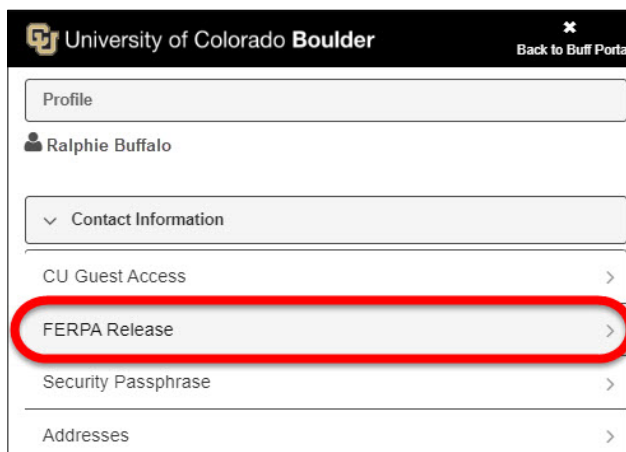
How to Authorize an Individual

1) Log in to Buff Portal, then select your profile at the top right.
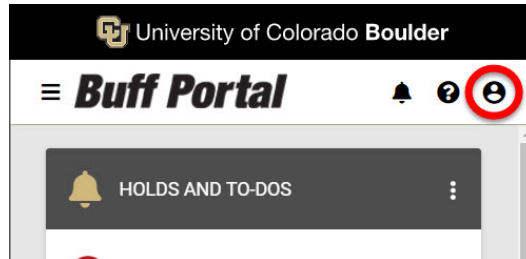
2) Select "Account Settings," then "Profile and Privacy."
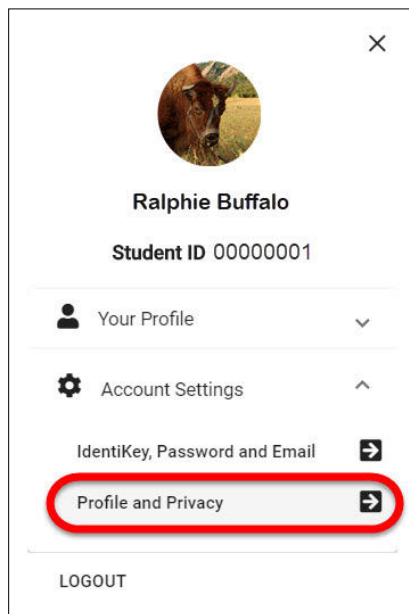
3) In the pop-up menu, select "FERPA Release."

4) Select "Authorize/Edit FERPA Consent to Release."

FERPA Consent to Release Student Information

👤 Ralphie Buffalo

The Family Educational Rights and Privacy Act (FERPA) is a federal law that protects the privacy of student education records. It applies to all schools that receive funds under an applicable program of the U.S. Department of Education and affords students certain rights related to their education records.

In compliance with FERPA, information from a student's education record is considered private and is not released to third parties, with certain exceptions, without the student's explicit documented permission. The University of Colorado only releases education record information to parents or other third parties when a student has authorized permission for the university to release or disclose student information to them. It is important to note that a FERPA consent to release allows for the disclosure of specified education record information from any University of Colorado campus to the authorized individual.

Information that may be released to third parties without student consent is considered Directory Information.

A student may restrict the release of directory information by submitting an official request for privacy with the university. See the Office of the Registrar for more information on FERPA and privacy requests.

Authorize/Edit FERPA
Consent to Release

5) In the form, enter the person's first and last names in the corresponding fields.

FERPA Release Information

(●) Authorized Third Party - Individual   (○) Authorized Third Party - Organization

Authorized Third Party - First Name   Chip

Authorized Third Party - Last Name   Buffalo

*Authorization Phrase   [   ]   WARNING! DO NOT USE A LOGIN PASSWORD

☑ Never Expires

☐ All Education Records   ☐ Financial Record Only   ☐ Academic Record Only

➕ Add   ✖ Delete

6) Enter a unique authorization phrase they'll use when contacting CU Boulder about your record.

7) If you want this authorization to expire, uncheck "Never Expires" and set an expiration date.

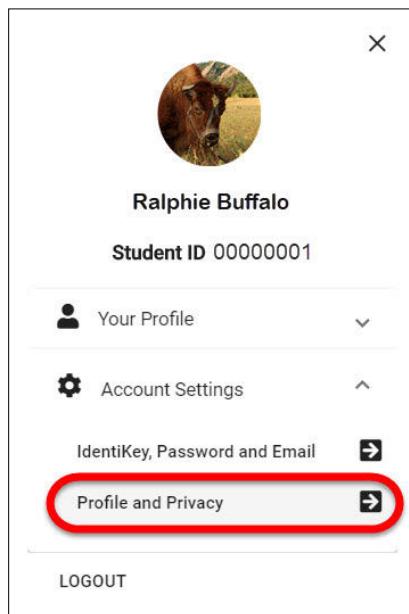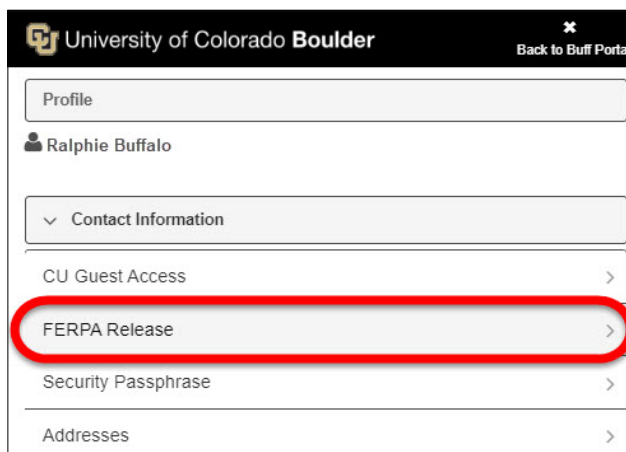8) Finally, identify which record(s) to grant them access to, then click "Save."

9) If the save was successful, a blank record will appear under the one you just created.

How to Authorize an Organization

1) Log in to Buff Portal, then select your profile at the top right.

2) Select "Account Settings," then "Profile and Privacy."

3) In the pop-up menu, select "FERPA Release."

4) Select "Authorize/Edit FERPA Consent to Release."

5) On the "Authorize/Edit FERPA Consent to Release Student Information" page, scroll down to the "FERPA Release Information" section.

6) Tick the radio button next to "Authorized Third Party - Organization."

7) Select the organization's name from the drop-down. If it's not listed, select "...Other..." and enter the name in the "If other" field.

8) Enter a unique authorization phrase representatives from the organization can use to verify their identity when they contact CU.

FERPA Release Information

○ Authorized Third Party - Individual   ⦿ Authorized Third Party - Organization

Organization   ...Other...   ⌄

if other: BUFFALO SOCIETY OF COLORADO

*Authorization Phrase   Sko Buffs   WARNING! DO NOT USE A LOGIN
                                         PASSWORD

☑ Never Expires

☐ All Education Records   ☐ Financial Record Only   ☐ Academic Record Only

➕ Add   ✖ Delete

9) By default, the authorization is set to never expire. To set an expiration date, uncheck "Never Expires" and use the calendar function to select a date.

FERPA Release Information

○ Authorized Third Party - Individual   ⦿ Authorized Third Party - Organization

Organization   ...Other...   ⌄

if other: BUFFALO SOCIETY OF COLORADO

*Authorization Phrase   Sko Buffs   WARNING! DO NOT USE A LOGIN
                                         PASSWORD

☐ Never Expires

Expiration Date   04/07/20: 📅

☐ All Education Records   ☐ Financial Record Only   ☐ Academic Record Only

➕ Add   ✖ Delete

10) Finally, identify which record(s) to grant this organization access to, then click "Save."

FERPA Release Information

<table>
<tr><td>○ Authorized Third Party - Individual</td><td>◉ Authorized Third Party - Organization</td></tr>
</table>

Organization	...Other... ⌄
if other:	BUFFALO SOCIETY OF COLORADO
*Authorization Phrase	Sko Buffs WARNING! DO NOT USE A LOGIN PASSWORD
☐ Never Expires	
Expiration Date	04/07/20: 🗓

☑ All Education Records   ☐ Financial Record Only   ☐ Academic Record Only

➕ Add   ✖ Delete

Save

11) If the save was successful, a blank record will appear under the one you just created.

How to Modify an Existing Authorization

1) Navigate to the "Authorize/Edit FERPA Consent to Release Student Information" page, then scroll down to the record you want to edit.

2) Make your changes, then click "Save."

How to Revoke an Authorization

1) Navigate to the "Authorize/Edit FERPA Consent to Release Student Information" page, then scroll down to the record you want to edit.

2) Click "Delete."

3) A confirmation message will ask whether you really want to delete FERPA consent to release for that individual or organization. Click "Yes - Delete" to confirm.

FERPA Restrictions > Delete Confirmation   Return To FERPA Restrictions Summary

Ralphie Buffalo

Do you really want to delete FERPA Consent Release ?

Yes - Delete   No - Do Not Delete

Frequently Asked Questions

Can I authorize more than one person?

Yes. You can have an unlimited number of authorized third parties.

How does someone prove they've been granted FERPA consent?

If they contact the university, they'll be asked to state their name and/or organization and provide the correct authorization phrase that you established for them.

What's the difference between this and CU guest access?

FERPA consent allows university representatives to answer questions about specific aspects of your record and discuss the record with individuals other than you. CU guest access is an online, read-only way for guests to see certain components of your record. It doesn't allow guests to ask questions about or discuss your record with a university representative.

CU Guest Access

What It Is

CU guest access is a read-only, online option for guests to view specific aspects of your education record. You can select components of your record that the guest can view, and you can modify or revoke access at any time. Guests can't make any changes to your record or complete any transactions on your behalf.

Note: If you've established a preferred name, that's the name guests will see when they log in.

A limited number of items are available through CU guest access. These include:

- **1098-T** – Your 1098-T tax form with your Social Security number removed

- **Advisor information** – May include name and email for assigned advisors based on plan or program

- **College Opportunity Fund (COF) selections** – For Colorado resident undergraduate students who are COF eligible

- **Class schedule** – Enrolled, dropped and waitlisted classes by term

- **Contact information** – Includes student home, mail and local addresses, CU Boulder email addresses and phone numbers

- **Course history** – A record of all classes taken, including campus, status and grades

- **Emergency contact information** – All emergency contact information supplied by the student, including a contact's relationship, address, phone and email, if available

- **Enrollment appointments** – Enrollment dates for upcoming terms by campus

- **Grades** – All grades from classes taken at a University of Colorado campus, including credit hours and GPA

- **Health insurance selection** – Coverage selected or waived by the student and by term

- **Holds** – Current campus-specific holds that may impact registration

- **Program/plan information** – Includes all institutions, careers, programs, majors and degrees

- **Transfer credit report** – Credit received from external institutions and applied at CU

- **Unofficial transcripts** – Includes "All CU Careers" unofficial transcript

Once you submit your guest's credentials, the guest will receive an email with a link to create their account and a list of the record components you've granted them access to.

What It Isn't

CU guest access *does not* enable the guest to contact the university with questions regarding your record. Records can only be discussed with a parent or third party if the student has authorized FERPA consent to release (page 4).
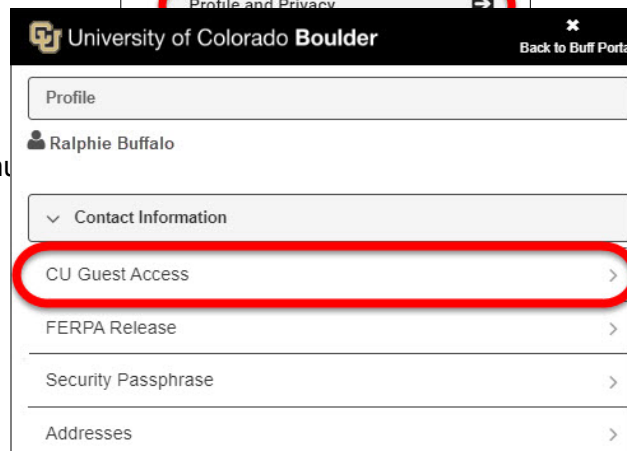
How to Set It Up

1) Log in to Buff Portal, then select your profile at the top right.
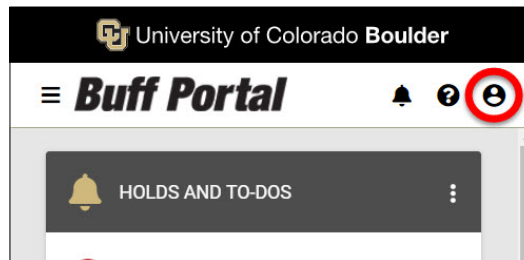
2) Select "Account Settings," then "Profile and Privacy."
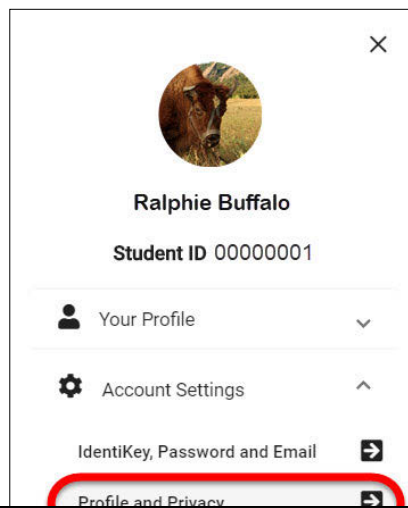
3) In the pop-up menu

4) On the "CU Guest Access – Summary" page, click "Authorize CU Guest Access."

CU Guest Access – Summary

👤 Ralphie Buffalo

Below are the guests you have authorized to have view access to your own education record information online. To edit the information for a guest, click the Edit button. To authorize access to a new guest, click the Authorize CU Guest Access button.
Note: This service only authorizes a guest to view specified information online when available. It does not permit university officials to release education record information directly to the guest. To allow for university officials to share information with individuals, see the information under FERPA Consent to Release.

No current CU guest access found.

[Authorize CU Guest Access]

5) Read the terms and conditions, then click "I accept."

CU Guest Access – Terms and Conditions

👤 Ralphie Buffalo

CU Guest Access – Terms and Conditions
The Family Educational Rights and Privacy Act (FERPA) is a federal law that protects the privacy of student education records. It applies to all schools that receive funds under an applicable program of the U.S. Department of Education and affords students certain rights related to their education records.

In compliance with FERPA, information from a student's education record is considered private and is not released to third parties, with certain exceptions, without the student's explicit documented permission. The University of Colorado only releases education record information to parents or other third parties when a student has authorized permission for the university to release or disclose student information to them. It is important to note that a FERPA consent to release allows for the disclosure of specified education record information from any University of Colorado campus to the authorized individual.

Information that may be released to third parties without student consent is considered Directory Information. A student may restrict the release of directory information by submitting an official request for privacy with the university. See the Office of the Registrar for more information on FERPA and privacy requests.

I understand that, by clicking the "I accept" button below, I am giving written consent for the University of Colorado to allow view access to student information specified by me herein to the individual(s) identified as a guest for the purpose of facilitating the administration of the specified information. I am entitled to edit or revoke this authorized access at any time.

[I accept] [I decline]

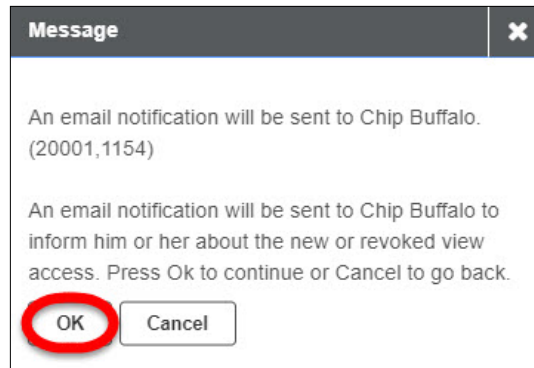6) On the "CU Guest Access – Details" page, enter your guest's name and email address.

7) In the "Access to Delegate" section, click the checkbox next to each type of information you'd like your guest to be able to access, then click "Save."
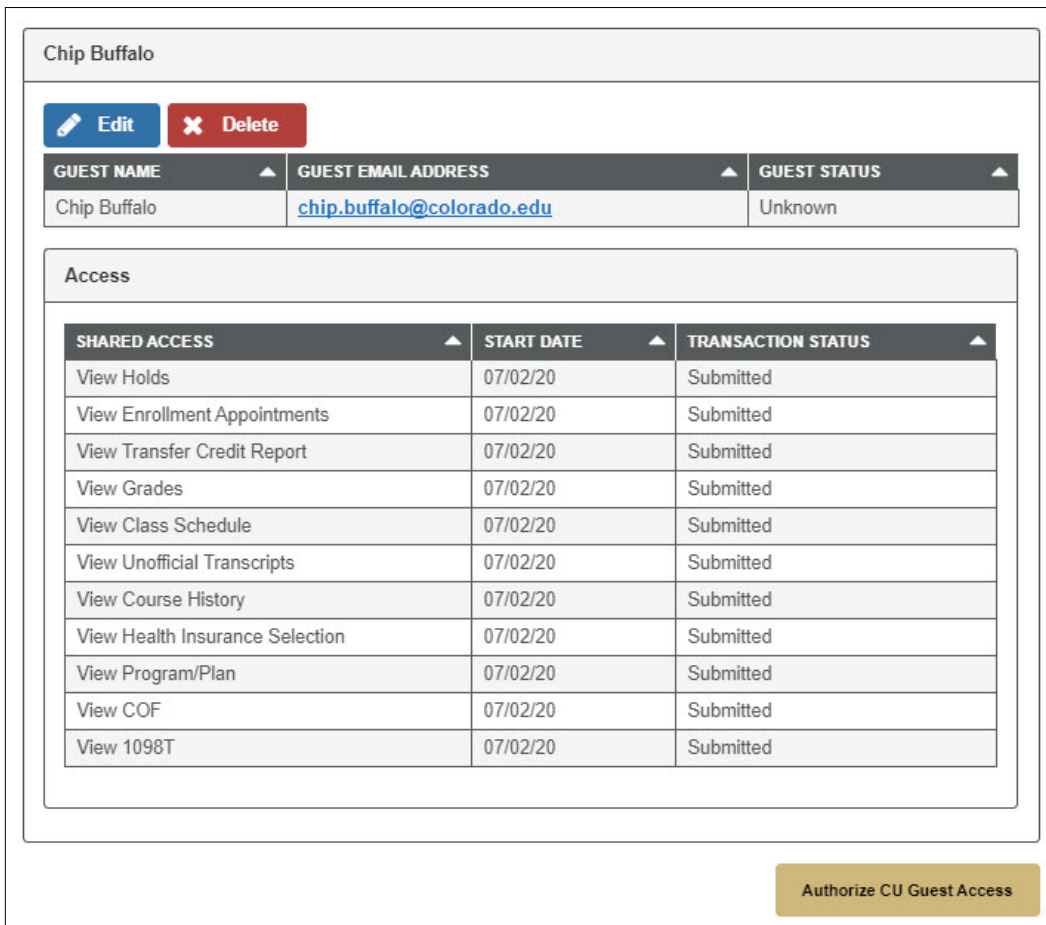
8) A pop-up message will tell you that an email notification will be sent to the guest to inform them about the new or revoked view access. Click "OK" to continue.

9) A confirmation lets you know the save was successful. Click "OK."

10) Now that authorization appears on your summary page.
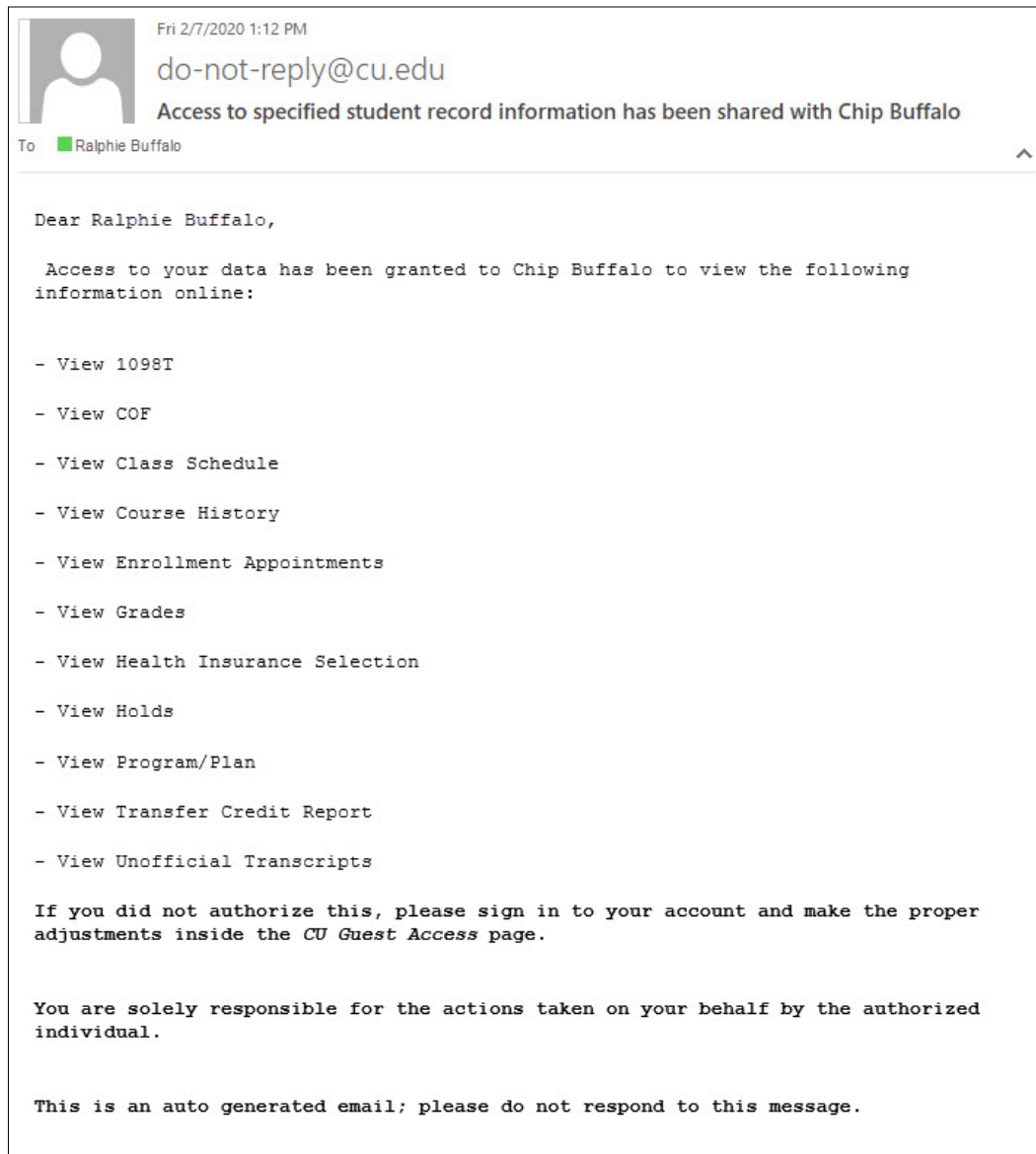
Chip Buffalo

✏ **Edit**   ✖ **Delete**

GUEST NAME ▲	GUEST EMAIL ADDRESS ▲	GUEST STATUS ▲
Chip Buffalo	chip.buffalo@colorado.edu	Unknown

Access

SHARED ACCESS ▲	START DATE ▲	TRANSACTION STATUS ▲
View Holds	07/02/20	Submitted
View Enrollment Appointments	07/02/20	Submitted
View Transfer Credit Report	07/02/20	Submitted
View Grades	07/02/20	Submitted
View Class Schedule	07/02/20	Submitted
View Unofficial Transcripts	07/02/20	Submitted
View Course History	07/02/20	Submitted
View Health Insurance Selection	07/02/20	Submitted
View Program/Plan	07/02/20	Submitted
View COF	07/02/20	Submitted
View 1098T	07/02/20	Submitted

Authorize CU Guest Access

11) You'll also receive an email confirmation.

Fri 2/7/2020 1:12 PM

do-not-reply@cu.edu

Access to specified student record information has been shared with Chip Buffalo

To ■ Ralphie Buffalo

Dear Ralphie Buffalo,

 Access to your data has been granted to Chip Buffalo to view the following information online:

- View 1098T

- View COF

- View Class Schedule

- View Course History

- View Enrollment Appointments

- View Grades

- View Health Insurance Selection

- View Holds

- View Program/Plan

- View Transfer Credit Report

- View Unofficial Transcripts

If you did not authorize this, please sign in to your account and make the proper adjustments inside the *CU Guest Access* page.

You are solely responsible for the actions taken on your behalf by the authorized individual.

This is an auto generated email; please do not respond to this message.

How to Resend a Guest's Email Notification

If your guest loses the email with their security key, you can re-send it within 30 days of creating their guest account.

1) Navigate to the "CU Guest Access – Summary" page, then scroll down to the record you want to edit.

2) Click "Edit."
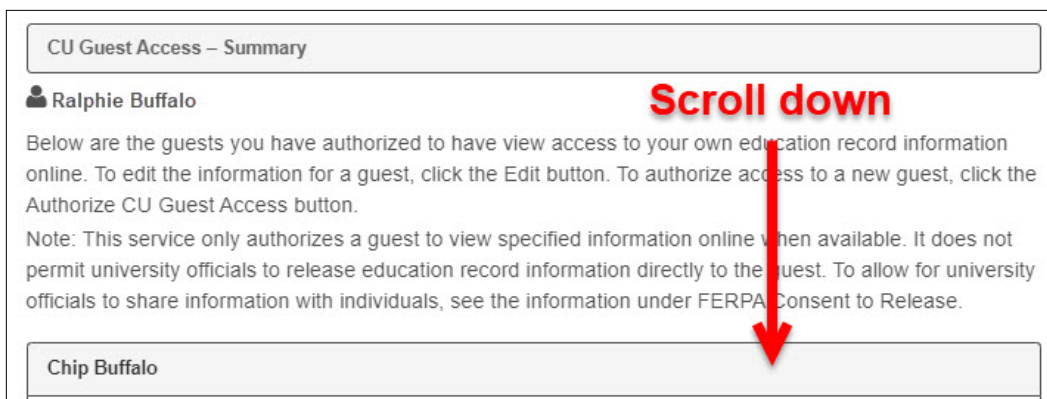
3) On the "CU Guest Access – Details" page, scroll down and click "Resend Email Notification."

4) A pop-up message will tell you the originaly email notification will be resent to the same email address. Click "OK" to continue.

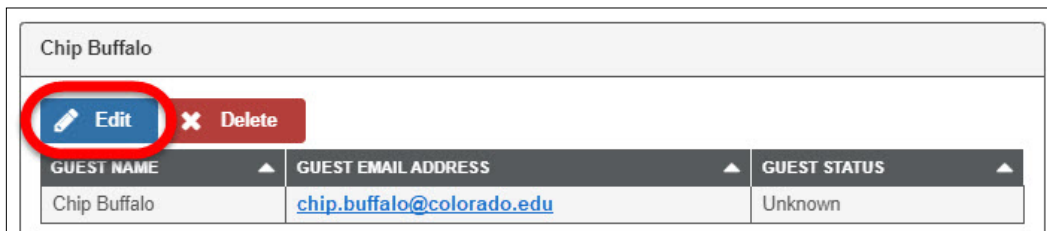# How to Modify a Guest's Access

1) Navigate to the "CU Guest Access – Summary" page, then scroll down to the record you want to edit.


2) Click "Edit."

Using CU Guest Access

3) On the "CU Guest Access – Details" page, click the checkbox next to each type of information you'd like your guest to gain or lose access to, then click "Save."

Access to Delegate

	TRANSACTION NAME	DESCRIPTION	START DATE	TRANSACTION STATUS
☑	View 1098T	Authorize the ability for a guest to view 1098T		Submitted
☐	View Advisor Information	Authorize the ability for a guest to view your advisor information.		
☑	View COF	Authorize the ability for a guest to view COF (Undergraduate Colorado Residents Only)		Submitted
☐	View Class Schedule	Authorize the ability for a guest to view your class schedule.		Submitted
☐	View Contact Information	Authorize the ability for a guest to view your contact information.		
☑	View Course History	Authorize the ability for a guest to view your course history.		Submitted
☐	View Emergency Contact Information	Authorize the ability for a guest to view your emergency contact information.		
☐	View Enrollment Appointments	Authorize the ability for a guest to view your enrollment appointments.		Submitted
☐	View Grades	Authorize the ability for a guest to view your grades.		Submitted
☑	View Health Insurance Selection	Authorize the ability for a guest to view your health insurance selection		Submitted
☑	View Holds	Authorize the ability for a guest to view the holds placed on your record.		Submitted
☑	View Program/Plan	Authorize the ability for a guest to view program/plan data.		Submitted
☐	View Transfer Credit Report	Authorize the ability for a guest to view your Transfer Credit Report.		Submitted
☐	View Unofficial Transcripts	Authorize the ability for a guest to view your unofficial transcripts.		Submitted

Resend Email Notification   Save

4) If you unchecked any boxes, a pop-up message will tell you that unselecting a transaction name will revoke the rights you previously shared with this guest and will list the unchecked items. Click "OK" to confirm.
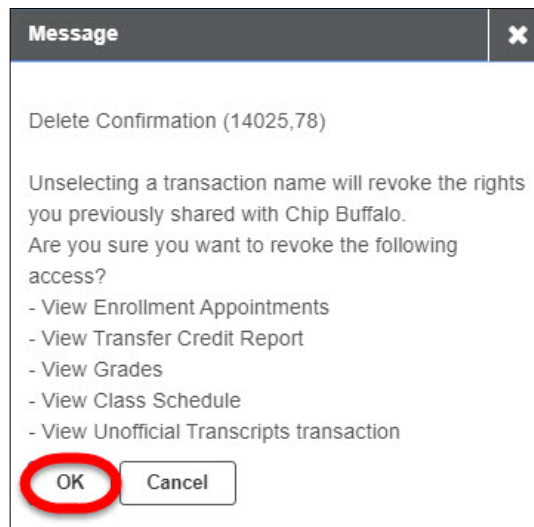
5) A pop-up message will tell you that an email notification will be sent to the guest to inform them about the new or revoked view access. Click "OK" to continue.
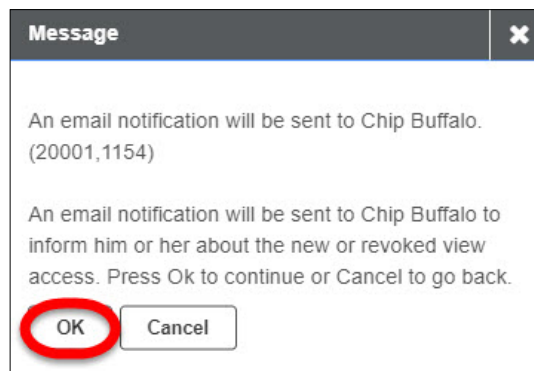
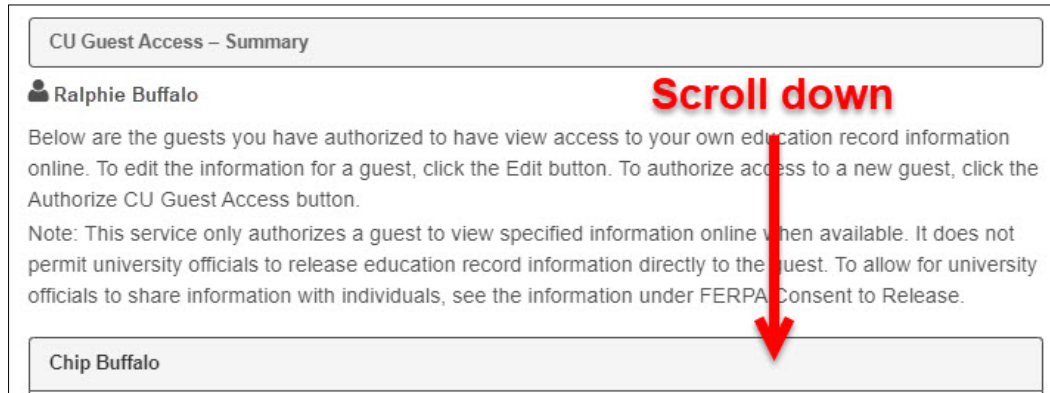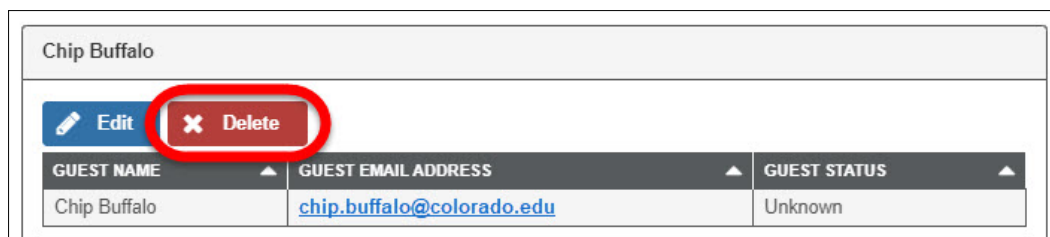6) A confirmation lets you know the save was successful. Click "OK."
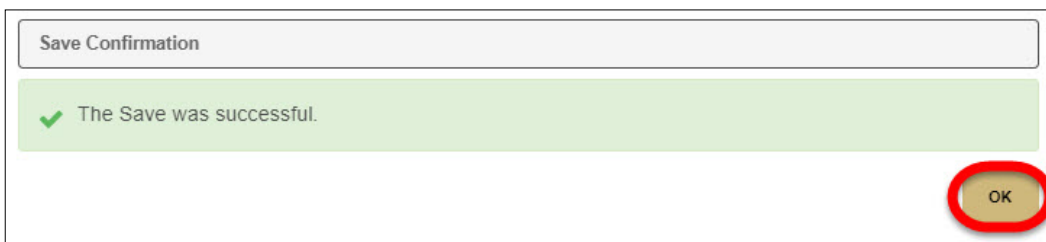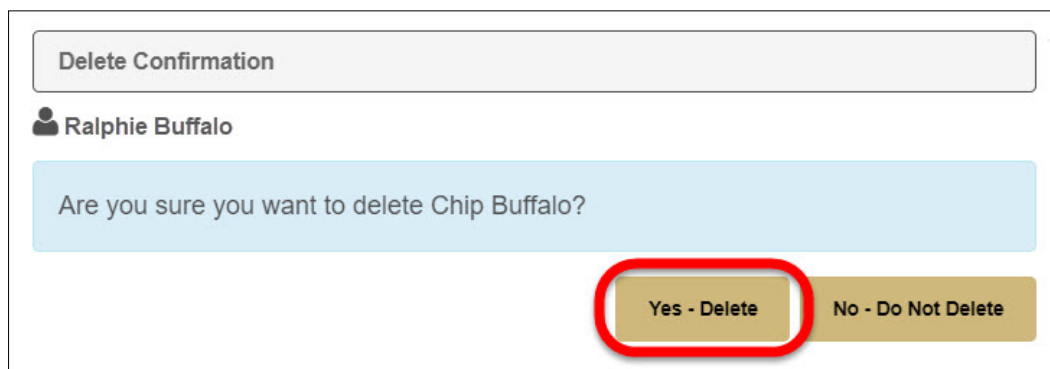
How to Revoke a Guest's Access

1) Navigate to the "CU Guest Access – Summary" page, then scroll down to the record you want to edit.

2) Click "Delete."

3) A message appears asking whether you want to delete that guest. Click "Yes - Delete" to confirm.

4) The guest will receive an email telling them their access has been revoked.

Frequently Asked Questions

Can I set up guest access for more than one person?
Yes. You grant guest access to an unlimited number of people.

Can a guest make changes to my records?
No. Guests can only view your records, not modify them.

Can a guest view my tuition and fee bill?
No. Access to financial records is maintained by the Bursar's Office. You'll need to set up your guest as an [authorized payer](#) to grant them access to your bill.

Can a guest come to CU or call an office and ask questions about my record?
No. In order to allow a guest to do that, you need to establish a FERPA consent to release for them.

What's the difference between this and FERPA consent to release?
CU guest access is online and read-only. A guest can't do anything on your behalf, and they can't speak with a university representative about your record. However, FERPA consent to release allows the university to discuss student-approved records with a parent or authorized third party.

Is there a way for me to tell if a guest has used their account?
The most you can tell is whether they've finished setting up their account. To do so, navigate to your "Guest Access - Summary" page and check their guest and transaction statuses:

Guest Status	Transaction Status	Guest's Account Setup Status
Unknown	Submitted	The guest has taken no action.
Accepted	Access Granted	The guest has completed setup and has access to your authorized information.