

## FERPA and Financial Aid

### The FERPA, Explained:

The Family Educational Rights and Privacy Act (FERPA) is a federal law that protects the privacy of student records and prohibits university staff from disclosing certain information to parents or other individuals without the permission of the student.

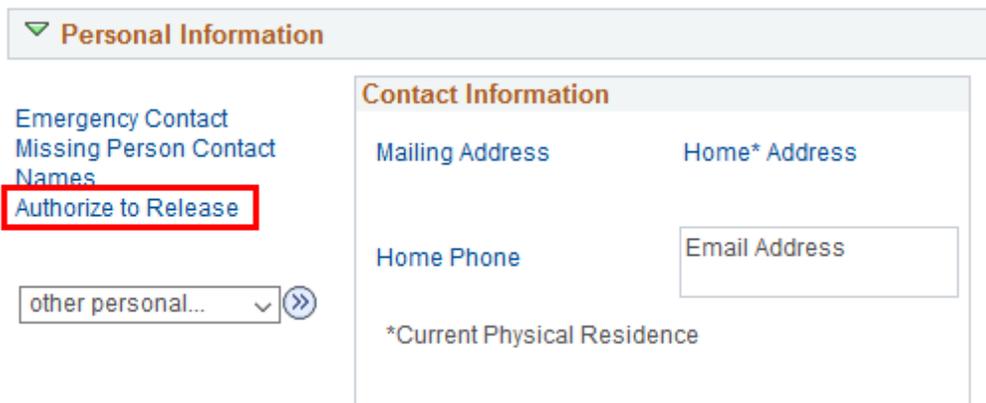
### FERPA and the Financial Aid Office

The Financial Aid Office (FAO) takes student privacy seriously. Records created and maintained by the FAO are considered education records and cannot be disclosed to a third party without the student's prior written consent.

## Authorization to Release Information

If you want to allow us to share your financial aid details with your parents, a guardian, a spouse, or other person, you must provide written permission via your student portal. Please follow the instructions below.

1. Log into your Student Center and click the "Authorize to Release" link in the Personal Information section.



The screenshot shows a user interface for 'Personal Information'. On the left, there is a list of links: 'Emergency Contact', 'Missing Person Contact Names', and 'Authorize to Release'. The 'Authorize to Release' link is highlighted with a red rectangular box. Below this list is a dropdown menu with the text 'other personal...' and a right-pointing arrow icon. To the right of the 'Personal Information' header is a 'Contact Information' section. This section contains two columns of text: 'Mailing Address' and 'Home\* Address' in the top row, and 'Home Phone' and 'Email Address' in the bottom row. Below the 'Home\* Address' text is a text input field. At the bottom of the 'Contact Information' section, there is a note: '\*Current Physical Residence'.

2. Enter the person's first and last name.
3. Create a unique 4-digit access code for them (make sure that they know it!).
4. Select which offices may release information to this person.

Note that third-party designees will be required to identify themselves and provide your name and student ID number or SSN along with their access code in order to confirm that they are an authorized designee. Information will not be released unless these criteria are met. If the person does not know or has forgotten their access code, you will need to give it to them again. We cannot release it for you.

## Create an Authorization to Release

go to ...

Your student records which are maintained by Cal Poly are protected under the [Family Educational Rights and Privacy Act](#) (FERPA). FERPA gives you the right to provide consent to disclosures of your education records to third parties, such as your parents, guardian, sponsor, etc.

Upon completing the form below, you are authorizing Admissions, Student Financial Services, and/or Financial Aid to share your records with your third-party designee(s). Granting access to one office does not grant access to the other offices. You must check the box for the corresponding office you wish to grant access. If an option does not exist for an office you wish to grant access to you will need to contact them directly.

**Admissions:** THIS IS THE ADMISSIONS INFO.

**Student Financial Services:** may release charges and payments posted on your student account, and/or financial aid that has been applied or is pending disbursement, as well as current enrollment status, as it affects your balance.

**Financial Aid and Scholarship Office:** may release financial aid and scholarship information, including student account, award, and disbursement activity as well as enrollment information related to financial aid eligibility. Information provided to our office through submitted applications or forms may also be released, including FAFSA and tax data.

Adding or modifying a third-party designee:

- Enter the third-party designee's first and last name
- Create a 4 digit access code for the third-party designee and share it only with that person
- You can modify a third-party designee's access by marking or unmarking the checkboxes below
- To add a third-party designee, click the '+' button
- Click the 'Save' button to save your entries and/or changes

**Before your student information may be released, your third-party designee *will be required to: identify themselves, provide your student name and ID, and their access code to confirm they are your authorized designee.*** Do not share this information with anyone other than your authorized designee.

If you are not a currently enrolled student, access granted to your third-party designee may no longer be valid.

### Authorization to Release your Information to your Designee

* First Name	* Last Name	* Access Code	Student Financial Services	Financial Aid	Admissions	
Joe	Doe	5678	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>