UMass | Dartmouth

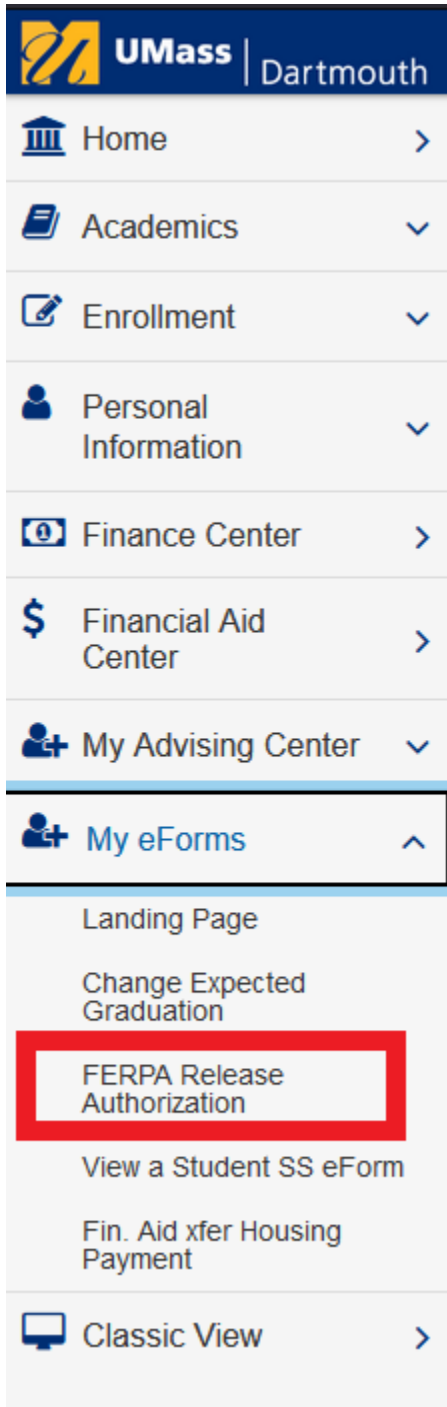## FERPA Release Authorization Job Aid

1. In COIN, navigate to **My eForms** and select **FERPA Release Authorization** from the dropdown.

The form will appear as follows:

FERPA Release Authorization

The Family Educational Rights and Privacy Act of 1974 (FERPA), as amended, protects the privacy of educational records, establishes the rights of students to inspect and review their educational records, and provides guidelines for the correction of inaccurate or misleading data through informal and formal hearings. This release applies to the disclosure of educational records. The student authorizing the release of his/her educational records must submit this FERPA Release Authorization before UMass can release specified information. Third-party release is for informational purposes only.

Please note: The University of Massachusetts is a university system, and information, including but not limited to student records, may be shared between the different campuses/organizations.

To see the FERPA policies for your campus, you may select the link for your respective campus:

- **Boston:**   https://www.umb.edu/registrar/policies/ferpa
- **Dartmouth:** https://www.umassd.edu/registrar/ferpa-faq/
- **Lowell:**   https://www.uml.edu/registrar/policies-and-procedures/ferpa.aspx

Grant/Revoke Access to a Designee

You may wish to grant an authorized designee to one or more areas of access, or you may wish to revoke a designee's access to your education records. Be sure to update an individual by entering changes in the appropriate row(s), and selecting "Submit" at the bottom of the form.

To Add access for a designee:

1. Click the '+' button to add a new row (if necessary) in the "Person(s) to whom information may be released" section.
2. Enter the First Name and Last name of the deignee who can receive information about you.
3. Choose the most accurate relationship the designee has with you.
4. Select the information that university employees can release to the designee. Below is a detailed explanation of the different access areas:
    - **Financial Records:** Access to your Financial Records data includes but not limited to financial aid, student finances, holds and housing.
    - **Academic Records:** Access to your Academic Records data includes but not limited to class enrollments, grades, unofficial transcript, degree progress, class performance, class participation, holds and academic advising.
    - **Both:** Access to both your Financial and Academic Records data.
    - **Other:** Limited or specific information you specify.
5. Select which campus(es) can release your information to the designee.
6. Choose the period the university can release the specified information to the designee. Selecting "My time at UMass" means while you are an active student at the university.
7. Specify a release code that the designee must provide the university for your information to be released.

Note: You must enter all fields for a designee for the university to release information to that individual.

To Revoke access for a designee:

1. Click the '-' button by the designee for whom you want to revoke access. Removing the designee will remove access to your data and preclude that individual from discussing your education record with any university staff, faculty, or business office, as stated by FERPA.
2. Be sure to update a designee by making changes in the appropriate row(s), and selecting "Submit" at the bottom of the form.

Your Details

Academic Institution	UMDAR
Name	
Student ID #	███

Person(s) to whom information may be released

1 row

	First and Last Name ⇕	Relationship to You ⇕	Information ⇕	Campus ⇕	Timeframe ⇕	Release PIN ⇕		
1		▾	▾	▾	▾	0	＋	－

Form Action Items

1 row

	Acknowledgement	
1	◯ No	By clicking "Yes," I acknowledge that the above specified information will be released with my full consent. I understand that this authorization remains in effect for the time specified.

▸ **Comments**

[Cancel] [Submit]

2. Enter information in all fields including the Release PIN. The Release PIN will be required when your designee contacts the university so be sure to share it with your designee. If you or your designee forget the Release PIN, you may review your submitted form in COIN and provide the Release PIN to your designee.

3. If you wish to add more than one designee, select the and enter their information. When finished, change the **Acknowledgment** from No to Yes and then select Submit.

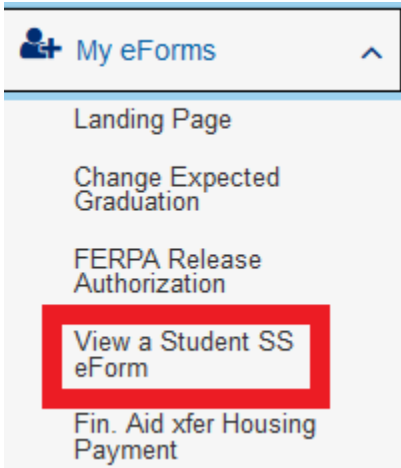4. You will receive confirmation that your form has been successfully updated.

Confirmation

You have successfully updated your FERPA Release Authorization Form.

[Return to Student Center]

To View Your Previously Submitted Form(s):

1. In COIN, navigate to **My eForms**, and select **View a Student SS eForm**.

2. Enter your Student ID#, Name, or Form Type and select search:

Note: If searching for your form using the name prompt, simply enter your student ID or your first name. If you enter your last name, you must change the name prompt dropdown from "Begins With" to "Contains".

How to read the FERPA Release Authorization information

"Information" - This is the information the student specified you can provide the individual.

- *Financial Records (all): Includes but not limited to financial aid, student finances, holds and housing.*
- *Academic Records (all): Includes but not limited to class enrollments, grades, unofficial transcript, degree progress, class performance, class participation, holds and academic advising.*
- *Both: Financial and Academic Records.*
- *Other: Limited or specific information the student specified can be released, which shows in the "Other Information" field.*

"Timeframe" - The period the university can release the specified information to the designee.

"My time at UMass" means while the student is an active student at the university.

"Release PIN" - A release code that the designee must provide the university for information to be released.

The Student's Details

Academic Institution UMDAR
Name
Student ID #

Person(s) to whom information may be released

1 row

	First and Last Name ⇕	Relationship to You ⇕	Information ⇕	Campus ⇕	Timeframe ⇕	Release PIN ⇕
1	Arnie Corsair	Parent	3 - Both	UMass - Dartmouth	My time at UMass	2027

▶ Comments

To Add or Revoke a Designee:

If you wish to add or revoke a designee, you must submit a new FERPA Release Authorization eForm request by following the above steps. The updated inofrmation will be available immediately for university staff to view once you have submitted your eForm.

Questions? If you have questions regarding FERPA or the FERPA Release Authorization eForm, submit an inquiry and select topic = Registrar and more detail = FERPA.