

Proxy Access

Setting Up and Managing Proxy Access:

1. In a web browser, navigate to <https://banner.jcu.edu/>, select the Students drop-down, Student Profile and log in.
2. Click on the waffle in the upper left corner, select Banner, then **Proxy Access Setup & Management** and then select **Proxy Management**.
3. Select **Add Proxy**.

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Proxy Management

Proxy List

Expand a proxy to define relationship type, begin and end dates, and authorizations.

Your proxy list is empty.

[Add Proxy](#)

4. Enter the first name, last name, and e-mail address of the person you wish to grant proxy access to and click Add Proxy. NOTE: Proxy Access is given using e-mail addresses, so make sure you use the correct email address.

Add a Proxy

Add a new proxy using the form below. Then edit their profile and authorization settings to enable appropriate access.

* - indicates a required field.


First Name*

Last Name*

E-mail Address*

Verify E-mail Address*

5. Click "Expand" next to the proxy's name and complete the profile.
 - a. Set the relationship type to "Parent or Legal Guardian"
 - b. Enter a description (mom, dad, grandma, etc.)
 - c. Enter a Passphrase. This is required IF you are allowing the proxy to have verbal conversations with the Student Service Counselors in the office of Student Enrollment and Financial Services about the information you have authorized. This allows the university to verify their identity. You may change this Passphrase at any time. Please note: No information will be released over the phone to your proxy without this Passphrase.
 - d. If you would like, adjust the amount of time your parent will be given access.
 - e. If you set a Passphrase, select the "E-mail Passphrase" icon. This will send your proxy an email with their Passphrase.

 Collapse Freddie Mercury

Profile Authorization History Communication

Proxy Profile

Please select your relationship with this proxy. The list of pages available to the proxy is based on relationship type. The description field is your personal note about this proxy (dad, mom, soccer coach, company name). The passphrase can be used to determine FERPA identity for phone calls or other off-line queries by this proxy. You must communicate the passphrase to your proxy. You can control the start and end dates for proxy access below.

Special profile tab information text dealing with parents.

* - indicates a required field.



Relationship*

Description


Passphrase

Start Date (MM/DD/YYYY)*

Stop Date (MM/DD/YYYY)*

 E-mail Passphrase  Reset PIN


6. Click on the Authorization tab to select the information you would like your proxy to access. You may change these at any time.

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Profile Authorization History Communication

Page Authorization

Select the information pages your proxy should be able to access. Once authorized, your proxy will be able to view and/or update these pages when they log in.

 E-mail Authorizations

Special authorization tab information text dealing with parents.

Parent Access to Student Financials Check to Select or Deselect ALL items below.

- Current Student Account
- Student Financial Aid Award
- Federal Shopping Sheet
- Student Financial Aid Requirements
- Student Account History

Parent Access to Student Records Check to Select or Deselect ALL items below.

- View Course Schedule Detail
- Student Schedule by Day and Time
- View Mid-Term Grades
- View Final Grades
- View Student Transcript
- View Holds on Student Account

7. The person you just added will receive an e-mail asking him or her to set up a password. Once your proxy has done this, they will be able to access the pages you have authorized.
8. You can click on the **History** tab to view a history of authorization changes that you have made for this specific proxy, as well as history of their logins and what pages they have viewed.
9. The **Communication** tab allows you to view a log of the various e-mails that have been sent to the proxy and gives you the ability to resend them (if necessary).
10. If your proxy forgets their PIN to login for Proxy Access, you can click on Reset PIN on the Proxy's profile to reset their PIN via email.
11. If your proxy forgets the Passphrase you set up for them, you can click on E-mail Passphrase on the Proxy's profile to reset their PIN via email.
12. Note that you are the only one who can reset the PIN, Passphrase, enable, and/or disable access for your Proxy(s).

Note for Student Billing Account access:

You will need to set up your parent as an Authorized User on your student account in order for them to receive email notifications regarding your student account, to see account activity, make payments, and set up a Payment Plan via the Student Account Suite. Instructions for this setup can be found here: <http://sites.jcu.edu/aid/pages/billing-and-payment/>