Proxy Access Management Guide for Students

This guide explains how College of Charleston students share limited access to certain academic and financial aid information with a parent or legal guardian. Designating a parent or legal guardian as a proxy gives the proxy direct access to the information specified by the student through Self-Service Banner.

**Step 1**

- Go to MyCharleston.
- Login with your CWID and password.

Use the links provided if you have forgotten your password or need other login assistance.

![MyCharleston Login Screen]

**Step 2**

Select the **Academic Services** tab.
Step 3

- Locate the **Banner Self-Service** channel
- Click on the Banner Self-Service folder to expand it.
- Click on the Proxy Access Management folder to expand it.
- Click on Proxy Access Management

![Banner Self-Service Channel]

Step 4

The Proxy Access Management home page displays. Please read the information on this page carefully to understand proxy access before adding a proxy user.

- Once you determine that you wish to grant proxy access, click **Add Proxy**.

![Proxy Access Management Home Page]
Step 5
The Add a Proxy form will now display.

- Complete the information about the person you are designating as a proxy. Make sure to provide a valid email address*.
- When finished, click the Add Proxy button.
  - The person you designated as a proxy user will receive two emails with login and PIN information to set up their account. You will also receive a copy of these emails. The proxy cannot see any information until they complete setup and you authorize information for them to view (steps 6 - 8).

*Note: The recipient must be able to receive email at this address.

Step 6
A message at the top of the screen will alert that you have been successful in adding your proxy. You must now give the proxy access to the information you wish to share.

- Click on Expand next to the proxy’s name.

Note: To the right of the name is the number of pages you have shared with this proxy user.

Note: You may add additional proxy users with the Add Proxy button, however, the email address is a unique identifier; multiple users cannot be set up with the same email address.
Step 7

Complete the Proxy Profile information.

- Select “Parent or Guardian” for the relationship.
- OPTIONAL: Give a description for this proxy. For example, “Mom”.
- The start date will default to the day you are setting up the proxy. You may change this date.
- OPTIONAL: Set an end date. If you do not set an end date, the system will default to 1 year from the current date.

_Note: Information you input is auto-saved. An email is generated to the proxy user, but they must first set up their account before using the link in this email._

_Note: You may reset a proxy user’s pin if they lose it or get locked out of their account with the “Reset Pin” option on this screen._

_Note: If you ever wish to revoke access entirely for a proxy user, click the “Delete Proxy Relationship” button on the Profile page. An email will be generated to the user._
Step 8

Select the information your proxy should be able to access.

- Click on the **Authorization** tab.
- Click in the box to the left of the information that you wish to share.
  - If you would like to share everything under a main heading, you need only click the box to the left of the heading and all pages under that heading will be selected.

*Note: Click on an option to see what your proxy would see if granted access to that option.*

*Note: You may change the access of your proxy at any time. Authorized information and changes to authorizations are not communicated to the proxy unless you click on the “E-mail Authorizations” button.*
Note about History and Communication tabs.

These tabs allow you to:

- See a history of access given, what access has been removed and what information has been viewed.
- View the email communications sent to your designated proxy.
Proxy Access Management

This feature provides students with a way to delegate proxy access to limited users to view selected student information. The student is able to modify the access rights and validate users as well as view a log of the most recent activity. Proxy access does not authorize a College of Charleston personnel to communicate with authorized proxies. To authorize this type of communication, students must provide a written consent form. For more information on College policy, please refer to the College of Charleston Information Security Policy.

By granting access to a student, the student's confidential records are only visible to the designated users. Students should consider and discuss the confidential nature of the information before granting access.

If the authorized proxy has questions about the information they are viewing, they should speak to the student who the student can authorize access to. College of Charleston Staff should never grant or revoke these rights.

Authorized proxies must have a valid College of Charleston email address and be authorized to access the student's information.

To add a proxy to a student's relationship, log in to the College of Charleston Portal and select "Proxy Access Management." From there, you can add a new proxy by entering their email address and confirming their access rights. Once the proxy is added, the student can view their information through their email. If the student has any questions about the information they are viewing, they should discuss it with the authorized proxy.