

## 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 9 in MyPortal.

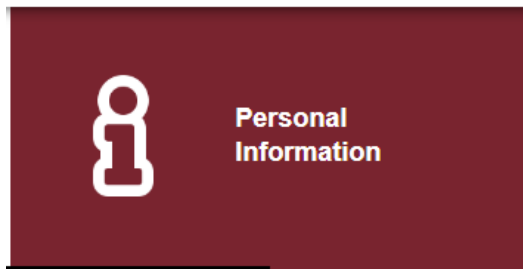
If you had previously Authorized a proxy in MyCharleston, you must Authorize them again in MyPortal, see Editing Proxy Access Dates and Authorizations

### Step 1

- Go to MyPortal (<https://myportal.cofc.edu/>)

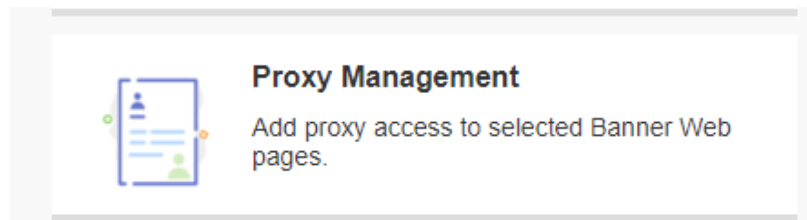
### Step 2

Select the **Personal Information** tile



### Step 3

- Click on the **Proxy Management** tile



### Step 4

Click **Add New**



## Step 5

The **Proxy Information** page will display

- Complete the information about the person you are designating as a proxy. Make sure to provide a valid email address\* and select **Relationship**.

Proxy Management • Proxy Information

### Proxy Information (i)

**Profile (Required)**

First Name

Last Name

E-Mail

Verify E-Mail

Relationship (i)

Start Date

Stop Date

**Authorizations (Required) (i)**

Select All

- Financial Aid Dashboard
- College Financing Plan
- Financial Aid Award Offer
- Financial Aid Notifications
- Financial Aid Resources
- Financial Aid Satisfactory Requirements
- Financial Aid Award History
- Student Profile Info
- Student Detail Schedule
- Student Grades
- Student Holds

E-mail Authorizations

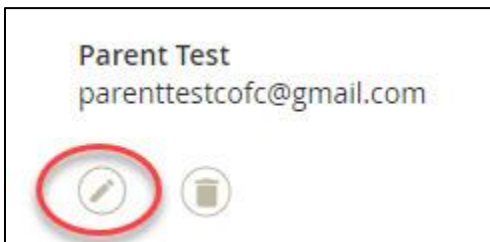
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- After **Relationship** is selected the options of Information that you wish to Authorize will appear. Select the Information you want to Authorize to your Proxy and click **Submit**.
  - The default **Stop Date** is 1 calendar year. You can update that before you submit or Edit in the future.
  - The person you designated as a proxy user will receive two emails with login and initial password information to set up their account. You will also receive a copy of these emails.

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

### Editing Proxy Access Dates and Authorizations

- To update the Proxy Stop date or the Authorizations click the Edit “Pencil” Icon under your Proxy’s name and e-mail.



- Update the Stop Date and click **Submit**.
- Select the Information you want to Authorize to your Proxy and click **Submit**.

*Note: You may reset a proxy user’s password if they lose it or get locked out of their account with the “Reset Password” option on this screen.*

*Note: You can send a list of Authorizations to your Proxy by clicking “Email Authorizations”.*

### Deleting a Proxy

- If you ever wish to revoke access entirely for a proxy user, click the “Trash” icon on the Profile page. An email will be generated to the user.



**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.

Parent Test (parenttestcofc@gmail.com) [Reset Password](#)

Proxy Information

History

Communication