

CONFIRMING AUTHORIZED USER

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REVISION HISTORY

Version	Date	Name	Description
	6/2018	Bracken Dailey	Updates for Banner 9

INTRODUCTION AND PURPOSE

Students are allowed to give access to an authorized user to interact with the following three offices: Financial Aid, Housing and Student Business Services.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. FERPA - <http://registrar.ucr.edu/registrar/privacy-ferpa/default.aspx> gives guidance on when and to whom student information can be released
2. UCR has historically provided students access in self-service to give direct access to three offices (due to their financial component) on campus – Financial Aid, Housing and Student Business Services.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Financial Aid
2. Housing
3. Student Business Services

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, go to R' Space and select the Banner Training icon in order to follow along and practice. Please submit a ticket if you have trouble accessing Banner Training.

PAGES

The forms listed below are covered in this training.

Page	Page Name	Description
GPAPRXY	Proxy Access Management Form	

PROCEDURES

HOW TO DETERMINE IF ACCESS HAS BEEN GRANTED

STEPS

1. Go to **GPAPRXY**
2. Input the Student ID in the ID block and press **GO**
3. On this page there are a couple of important pieces of information:
 - a. **Look for multiple records** – students can create multiple authorized user accounts so you may need to page through to find the one you are looking for. The email address is the unique identifier for the authorized user. There can only be one authorized user in the entire system with that email address.
 - b. **Relationship** – for reference and understanding of who you are talking to, the student has provided the relationship between the student and the authorized user.
 - c. **Start Date and Stop Date** – it is important that you determine if today's date is within these dates. **If the current date is between these dates then the authorization is currently active.**
 - d. **Passphrase** – this phrase was created by the student and shared with the authorized user. You should request this phrase whenever you are trying to verify identity.
 - e. **Page Authorize list** – this is the list of what the student has granted proxy access to for the authorized user. You need to ensure that your department has a check mark. **If there is no check mark by your department the student has NOT given authorization (even if there is a passphrase).**

ID: N61252621 Brackon Janelle Dalley

PROXY ACCESS MANAGEMENT

Proxy Information

Name: [Clicking on proxy](#)

Relationship: Parent or Legal Guardian

Proxy Desc: Mother

Start Date: 09/28/2018

Stop Date: 12/25/2018

Passphrase: UCRqoal

Pin Disabled: N

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Page Authorization List Access List Communication Log

AUTHORIZATIONS

Module	Auth Ind	Menu Text	Page URL
Parent Access	<input checked="" type="checkbox"/>	View Address	bwgkogad.P_SelectAtypView
Parent Access	<input checked="" type="checkbox"/>	View Test Scores	bwsktacc.p_view_tests
Parent Access	<input checked="" type="checkbox"/>	View Final Grades	bwskogrd.P_ViewTermGrde
Parent Access	<input checked="" type="checkbox"/>	View Billing Account Information	bwskoacc.P_ViewAR
Parent Access	<input checked="" type="checkbox"/>	View Billing Account Summary by Term	bwskoacc.P_ViewAcct
Parent Access	<input checked="" type="checkbox"/>	View Billing Account Detail for Term	bwskoacc.P_ViewAcctTerm
Parent Access	<input type="checkbox"/>	View Financial Aid Award Overview	bwkfhst.P_DispatchAwardYear
Parent Access	<input checked="" type="checkbox"/>	View Financial Aid Student Requirements	bwknlg.P_DispatchReq
Parent Access	<input checked="" type="checkbox"/>	Speak with Student Business Services about billing information	zucroprf.p_display_billing
Parent Access	<input checked="" type="checkbox"/>	Speak with Financial Aid Office about financial aid information	zucroprf.p_display_finaid
Parent Access	<input checked="" type="checkbox"/>	Speak with Housing Services Office about housing information	zucroprf.p_display_housing

PRIOR TO SPEAKING WITH ANY AUTHORIZED USER YOU SHOULD ENSURE:

1. THE NAME AND DATE OF BIRTH OF THE STUDENT (this can be found on SPAIDEN)
2. THE NAME OF THE AUTHORIZED USER
3. PAGE AUTHORIZATION TO YOUR DEPARTMENT
4. THE PASSPHRASE
5. THE CURRENT DATE IS WITHIN THE START AND END DATE OF THE AUTHORIZATION

NOTE: IF YOU RECEIVE A WARNING THAT THE STUDENT INFORMATION IS CONFIDENTIAL, PLEASE MAKE SURE YOU CHECK THE DIRECTORY INFORMATION FLAGS ON **GOADPRF**.



A screenshot of a software interface. At the top is a dark blue navigation bar with four buttons: 'ADD' (with a plus icon), 'RETRIEVE' (with a document icon), 'RELATED' (with a hierarchy icon), and 'TOOLS' (with a gear icon). To the right of these buttons is an orange box containing the number '1'. Below the navigation bar is a yellow banner with a warning icon (a triangle with an exclamation mark) on the left. The text in the banner reads 'Banner' followed by 'Warning: Information about this person is confidential.' At the bottom right of the banner is a dark grey button with the text 'OK'.

IF NAME HAS BEEN RESTRICTED YOU CANNOT RELEASE ANY INFORMATION, TO INCLUDE ANY ACKNOWLEDGEMENT THAT THE STUDENT IS/WAS A STUDENT. YOU NEED TO SIMPLY SAY – **I HAVE NO INFORMATION**. THE STUDENT NEEDS TO RESOLVE THIS CONFLICT IN APPROVAL TO RELEASE INFORMATION BEFORE ANY FURTHER DISCUSSIONS CAN BE MADE REGARDING THE STUDENT ACCOUNT.