

Intro to Proxy Management

Instructions for Assigning Proxy Access to Student Records at Marshall University

What is a Proxy?

A proxy can be defined as a person who represents someone else. In this case, the person you identify as your proxy, will have access to the academic records you will indicate in our proxy system. This person will receive an email which will allow them to set up their own account to track your records and they can speak with a representative of the university on your behalf as long as they have a passphrase (a phrase in which you and your proxy will agree upon). You can change/delete a proxy at any time.

Directions to set up Information Release (Proxy):

Please Remember:

- You can add a new proxy relationship at any time
- You can change what your proxy can see or have access to at any time
- You can delete a proxy at any time

Step One:

- Log into your MyMU Account: mymu.marshall.edu

Step Two:

- Select MILO Icon on the left hand menu
- Select "Information Release" Tab
- Click "Proxy Management" Link

Search: Go

Student & Financial Aid Information

Register, View your academic records, Review and Accept your Financial Aid, Make an online payment

Faculty & Advisors

Enter Grades and Registration Overrides, View Class Lists and Student Information

Personal Information

View or update your address(es), phone number(s), e-mail address(es), emergency contact information, View name change & social security number change informa

Employee Main Menu

Employee Self Service Menu

Return to MILO Homepage

Search: Go

Proxy Access Menu

Proxy Management

This page allows you to add proxy access to selected Banner Web pages. Anyone with an e-mail address can be a proxy.

Instructions

Click on "Instructions" for a detailed explanation on how to set up access for your Proxy.

RELEASE: B.7

Step Three:

- Click "Add Proxy"

Proxy Management

Proxy List

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

Your proxy list is empty.

Add Proxy

RELEASE: B.7

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- Fill in all required fields (first name, last name, email address, and verify email address for desired proxy)
- Click "Add Proxy" again

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*

Add Proxy

RELEASE: B.7

- Once proxy is added, your parent/guardian/spouse/other should receive an email

Step Four:

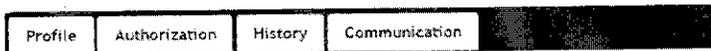
- Click the name of the person you just added to expand the menu

Proxy List

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

Expand [redacted] [redacted]@marshall.edu 0 pages

- Select a relationship from the drop-down menu (only one option)
- Add a short description (i.e. mother, father, grandmother, husband, wife, coach)
- Add a passphrase (this is a phrase that your proxy will need to know so that they may speak to or email with staff/faculty at Marshall about your records)
- Click "email Passphrase" to send passphrase to proxy--- there are also options to reset PIN or delete Proxy Relationship
- Optional: Change the "stop date" (it defaults to one year)



Proxy Profile

Please select your relationship with this proxy. The list of pages available to the proxy is based on relationship type. End dates for proxy access below.

* - indicates a required field.

Relationship*

Description

Passphrase

Start Date (MM/DD/YYYY)*

Stop Date (MM/DD/YYYY)*

E-mail Passphrase Reset PIN Delete Proxy Relationship

Your proxy has not verified their email address.

The proxy PIN is disabled.

Step Five:

- Click the "Authorization Tab"
- Check the boxes of all records you wish your proxy to have access to (this can be changed at any time)
- Once the boxes are checked or unchecked, the changes will be automatically saved

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.

Special authorization tab information text dealing with parents.

- Academic Information - Check to Select or Deselect ALL items below.
 - View Holds
 - View Midterm Grades (FR/SO Grades of D/F/NC only)
 - View Final Grades
 - View Academic Transcript
 - Student Detail Schedule
 - Student Schedule by Day and Time
 - General Student Information
 - Registration Status
 - Admissions Information
 - Housing Information
- Financial Aid Information - Check to Select or Deselect ALL items below.
 - View Student Requirements/Academic Progress
 - View Award Package by Aid Year
 - Display Award Messages
 - View Estimated Cost of Attendance
- Financial Information - Check to Select or Deselect ALL items below.
 - CashTrax - Proxy access must be configured in CashTrax
 - Tax Notification
 - Account Summary by Term
- General Information - Check to Select or Deselect ALL items below.
 - View Student Email Address
 - View Emergency Contacts
 - View Address & Phone
 - Marshall Bookstore/Textbook Information

To Delete Proxy Relationship:

- Login to MyMU
- Select MILO icon on left menu
- Select "Information Release" tab
- Once into the proxy menu, click on the name to expand the person in which you wish to delete
- At this point you can either
 - Click "delete proxy relationship," then confirm that you wish to delete that proxy (an email will be sent to the proxy notifying them that they no longer have access)
 - Change "stop date" to the next day
- Both of these options will no longer allow that person proxy access

Start Date (MM/DD/YYYY)*

Stop Date (MM/DD/YYYY)*



E-mail Passphrase



Reset PIN



Delete Proxy Relationship