

FERPA usage instructions

What is FERPA?

Ferpa stands for the Family Education Rights and Privacy Act, get more information [here](#).

What is a Proxy?

A proxy is anyone that you deem should have access to your scholastic records.

Where do I manage my proxy setting?

Proxies are managed on the FERPA Management tab in BANNER Student Online Services.

How do I assign someone as a proxy?

In BANNER Student Online Services, Using the PROXY access menu (additional info below).

How do I remove a proxy?

In BANNER Student Online Services, using the PROXY Access menu (additional info below).

How long are proxies good for?

All proxies expire at the end of the Summer Semester. You will need to reapply the privileges to the proxy if they are to be maintained after such time.

What is my Proxy's Username?

The Proxy's username is the Email Address given to the individual.

Missing emails?

Email settings may send the emails sent from this process to the SPAM or Junk Folders.

How do I advance my Proxy from year to Year/

The start and end dates that are used to grant a Proxy access must fall between June 1, and May 31 of a given academic year. Setting the start date prior to June 1 will cause the system to update the end date to May 31 of that academic year that night. Example: For fall 2016 to spring 2017 the start and end date must fall between June 1, 2016 and May 31, 2017.

Additional questions, please contact the Dean of Students

Phone: (315)866-0300 xt 8276

E-mail: dean_of_students@HERKIMER.EDU

Additional Information provided in this document:

Navigating to "FERPA Management"

Assign a new proxy

Updating proxy privileges

Updating proxy authorization

Resting proxy's pin

Removing a proxy

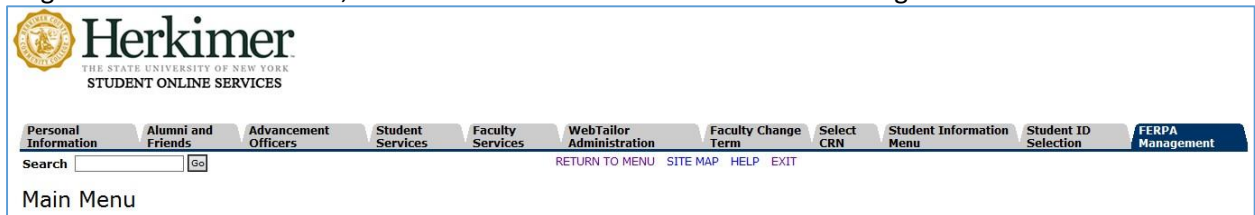
Navigating to FERPA Management

Sign into [MyHerkimer](#)

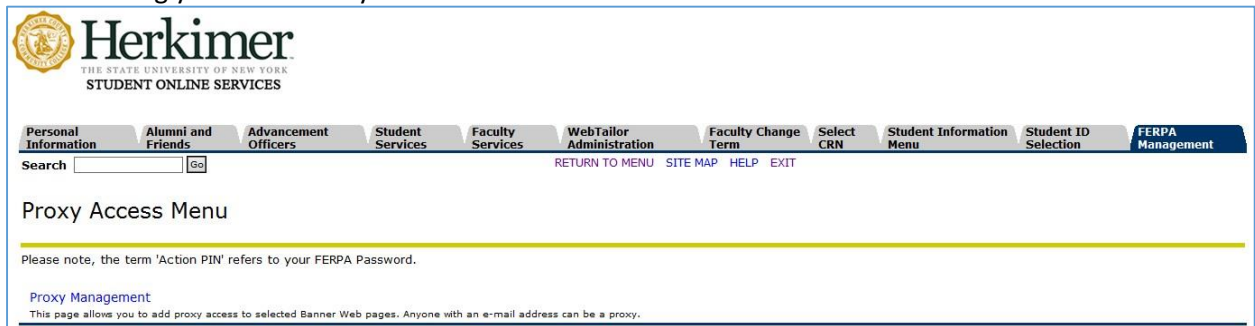
Using the Student Online Services link, sign into Student Online Services.



To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".



This will bring you to the Proxy Access Menu



Assign a new proxy

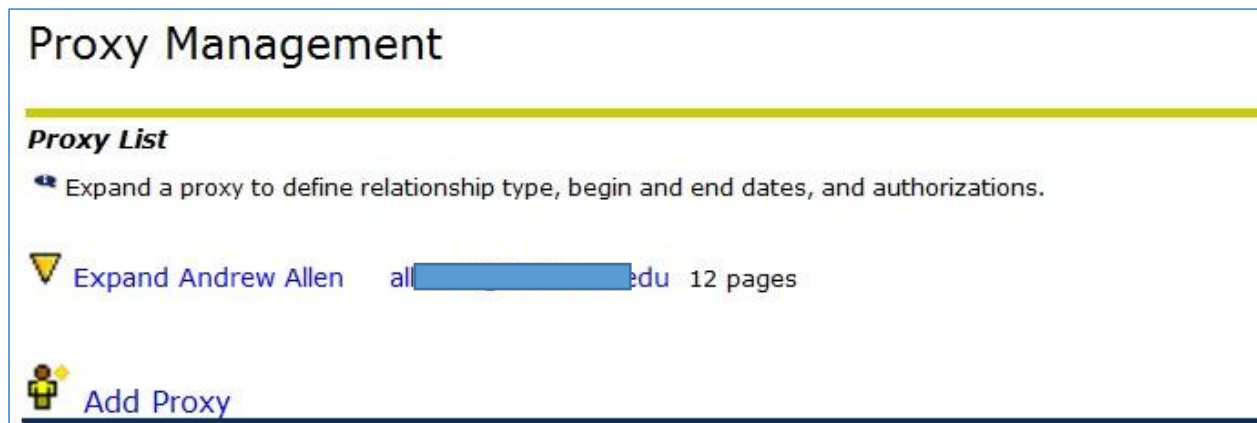
Sign into [MyHerkimer](#)

Using the Student Online Services link, sign into Student Online Services.

To get into the PROXY menu, click the last tab on the tab bar “FERPA Management”.

This will bring you to the Proxy Access Menu

Click on Proxy Management to bring up the Add/Edit options.



Proxy Management

Proxy List

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

Expand Andrew Allen all [redacted] edu 12 pages

Add Proxy

If a Proxy already exists, they will be listed with their name and the number of accesses granted.

To **Add a New Proxy** click on the Add Proxy option

In the newly presented boxes:

Enter the First Name of the individual who will be the Proxy

Enter the Last Name of the individual who will be the Proxy

Enter the Email address that will be associated with the Proxy, then verify the entry.

Click the **Add Proxy** button will:

Verify the information was entered correctly.

If the information is verified, the entity will be added to the list of Proxies.

At this point the Proxy will receive an email that outlines who made them a proxy, and the Action Password\Pin to sign into the system.

When the entry is completed the proxy will receive an email. This email will outline who made them a proxy, along with an email that contains their action password that will allow them to log into the system.

Updating Proxy Privileges

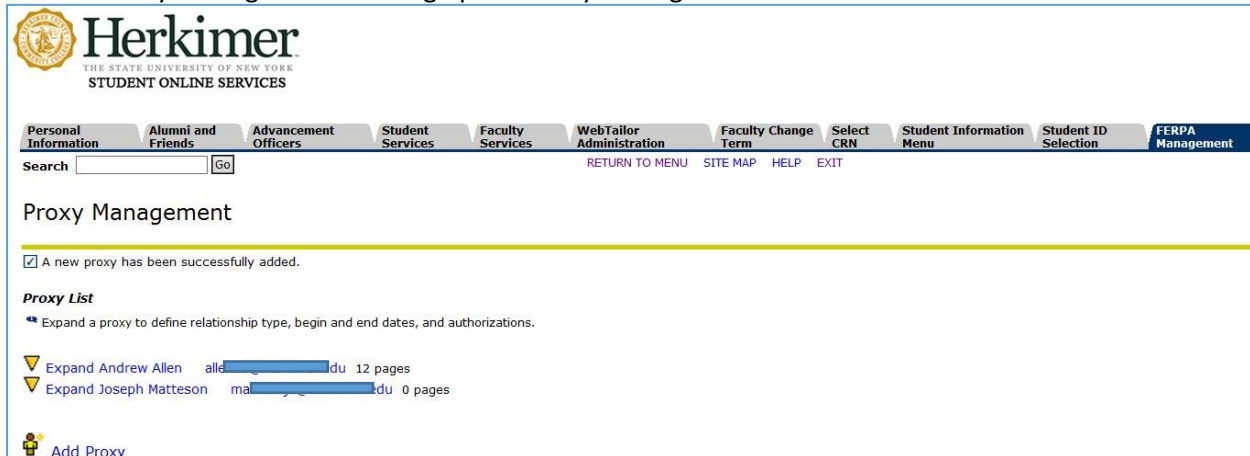
Sign into [MyHerkimer](#)

Using the Student Online Services link, sign into Student Online Services.

To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".

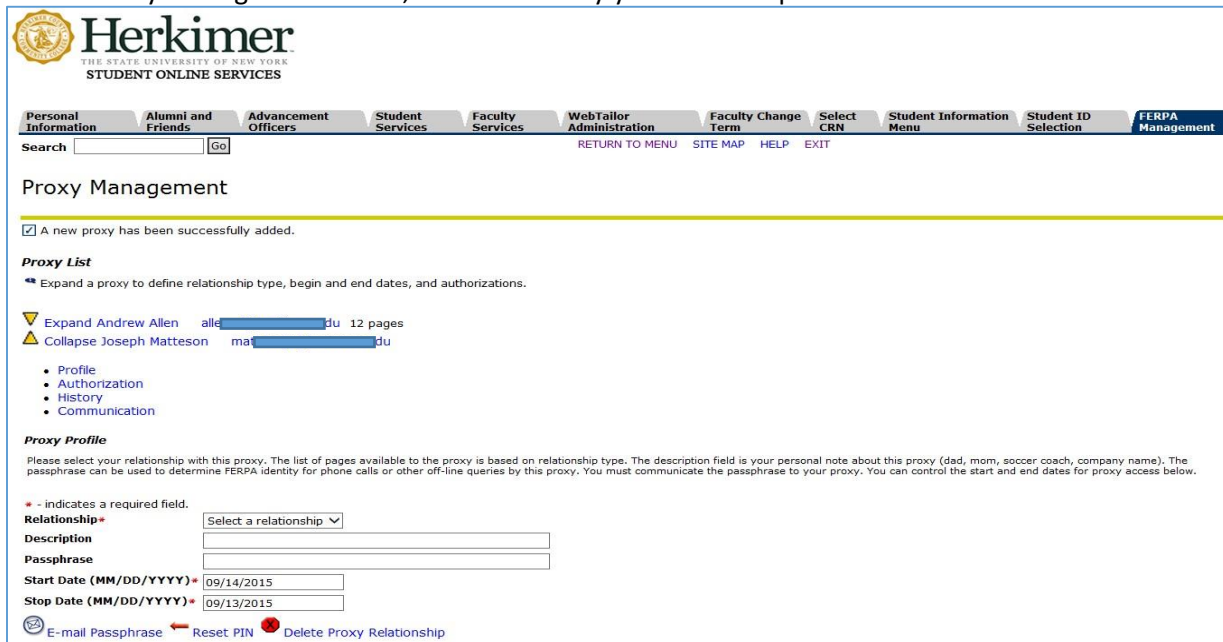
This will bring you to the Proxy Access Menu

Click on Proxy Management to bring up the Proxy Management menu.



The screenshot shows the Herkimer Student Online Services interface. The top navigation bar includes tabs for Personal Information, Alumni and Friends, Advancement Officers, Student Services, Faculty Services, WebTailor Administration, Faculty Change Term, Select CRN, Student Information Menu, Student ID Selection, and FERPA Management. A search bar and utility links (RETURN TO MENU, SITE MAP, HELP, EXIT) are also present. The main content area is titled "Proxy Management" and displays a message: "A new proxy has been successfully added." Below this is a "Proxy List" section with instructions to expand a proxy to define relationship type, begin and end dates, and authorizations. Two proxies are listed: "Expand Andrew Allen" with 12 pages and "Expand Joseph Matteson" with 0 pages. An "Add Proxy" button is located at the bottom left.

On the Proxy Management Menu, select the Proxy you want to update.



This screenshot shows the Herkimer Student Online Services interface with the "Proxy Profile" form expanded for the proxy "Joseph Matteson". The form includes fields for "Relationship" (a dropdown menu), "Description", "Passphrase", "Start Date (MM/DD/YYYY)", and "Stop Date (MM/DD/YYYY)". A note explains that the relationship type determines the list of pages available to the proxy and that the passphrase is used for FERPA identity. A legend indicates that asterisks denote required fields. At the bottom of the form are buttons for "E-mail Passphrase", "Reset PIN", and "Delete Proxy Relationship".

You will need to select a relationship for the person;

Each time the relationship field is updated the Proxy will receive an email Showing the new relationship selected.

The description is optional and is for personal use. It is a way for the student to note the relationship of the proxy. (Ex: Mother, Father).

The Passphrase is used by the proxy when speaking to the college.

Note: The passphrase is not sent automatically. The student needs to click on Send Passphrase.

The start and end dates note the time period in which the Proxy will have access to your information.

Note: All relationships are removed at the end of the next spring term, regardless of the end date.

Updating Proxy Authorization

Sign into [MyHerkimer](#)

Using the Student Online Services link, sign into Student Online Services.

To get into the PROXY menu, click the last tab on the tab bar “FERPA Management”.

This will bring you to the Proxy Access Menu

Click on Proxy Management to bring up the Proxy Management menu.

On the Proxy Management Menu, select the Proxy you want to update.

The screenshot shows the Herkimer Student Online Services interface. At the top, there is a navigation bar with tabs for Personal Information, Alumni and Friends, Advancement Officers, Student Services, Faculty Services, Web/Tailor Administration, Faculty Change Tools, Select CRM, Student Information Menu, Student ID Selection, and FERPA Management. Below the navigation bar is a search box and a set of utility links: RETURN TO MENU, SITE MAP, HELP, and EXIT. The main heading is "Proxy Management". A yellow banner indicates "A new proxy has been successfully added." Below this, there is a "Proxy List" section with a sub-heading "Expand a proxy to define relationship type, begin and end dates, and authorizations." Two proxies are listed: "Expand Andrew Allen" and "Collapse Joseph Matton". Under "Expand Andrew Allen", there are four options: Profile, Authorization, History, and Communication. Below the proxy list is the "Proxy Profile" section, which includes a detailed instruction: "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." The form fields include: Relationship (a dropdown menu with "Select a relationship" selected), Description, Passphrase, Start date (MM/DD/YYYY) with a value of 08/14/2015, and Stop date (MM/DD/YYYY) with a value of 08/13/2015. At the bottom of the form are three buttons: E-mail Passphrase, Reset PIN, and Delete Proxy Relationship.

There are four options to choose from

- Profile - update relationship and passphrases
- Authorization - Determine access
- History - Show changes
- Communication - Email communication history

Resting Proxy's Pin

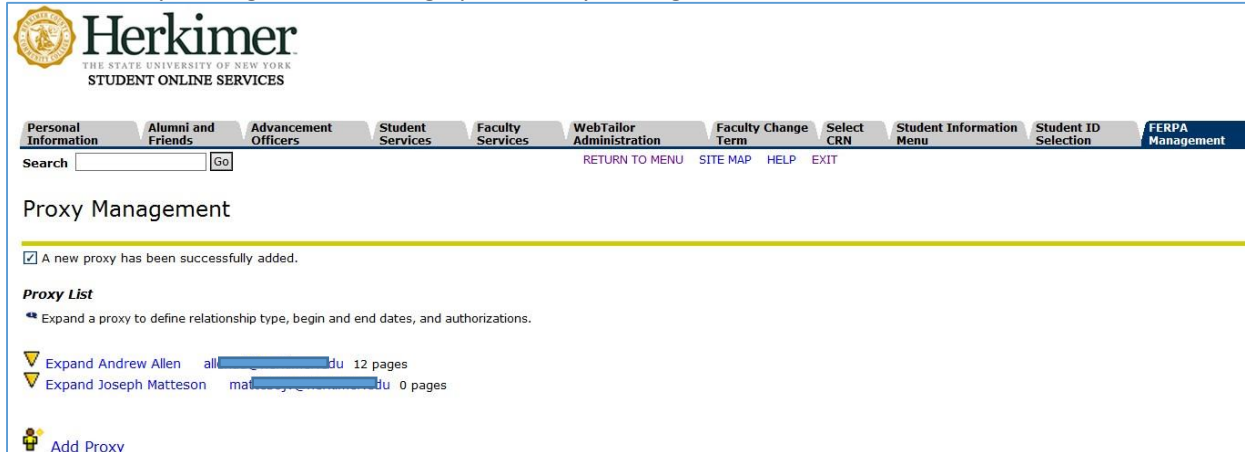
Sign into [MyHerkimer](#)

Using the Student Online Services link, sign into Student Online Services.

To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".

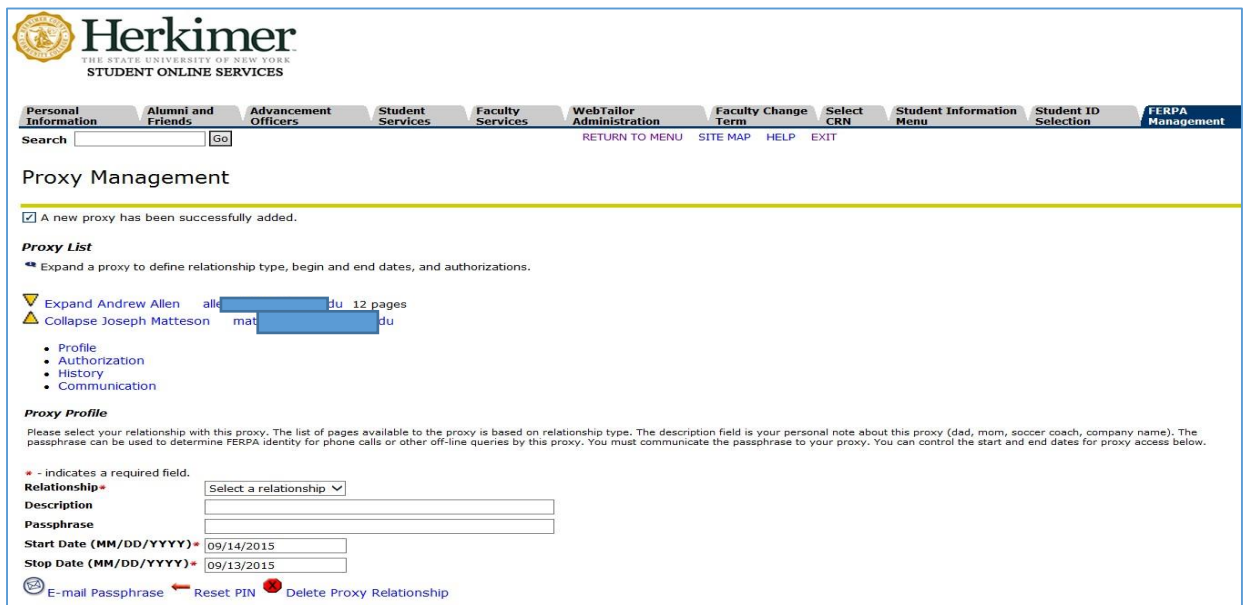
This will bring you to the Proxy Access Menu

Click on Proxy Management to bring up the Proxy Management menu.



The screenshot shows the Herkimer Student Online Services interface. At the top, there is a navigation bar with tabs for Personal Information, Alumni and Friends, Advancement Officers, Student Services, Faculty Services, WebTailor Administration, Faculty Change Term, Select CRN, Student Information Menu, Student ID Selection, and FERPA Management. Below the navigation bar is a search box and a "Go" button. The main content area is titled "Proxy Management" and contains a message: "A new proxy has been successfully added." Below this is a "Proxy List" section with a sub-header: "Expand a proxy to define relationship type, begin and end dates, and authorizations." The list contains two entries: "Expand Andrew Allen" with a relationship type of "all" and "12 pages" available, and "Expand Joseph Matteson" with a relationship type of "mat" and "0 pages" available. At the bottom of the list is an "Add Proxy" button.

On the Proxy Management Menu, select the Proxy you want to update.



The screenshot shows the Herkimer Student Online Services interface, specifically the "Proxy Profile" form. The navigation bar is the same as in the previous screenshot. The main content area is titled "Proxy Management" and contains a message: "A new proxy has been successfully added." Below this is a "Proxy List" section with a sub-header: "Expand a proxy to define relationship type, begin and end dates, and authorizations." The list contains two entries: "Expand Andrew Allen" with a relationship type of "all" and "12 pages" available, and "Collapse Joseph Matteson" with a relationship type of "mat" and "0 pages" available. Below the list is a "Proxy Profile" section with a sub-header: "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." The form includes a "Relationship" dropdown menu, a "Description" text field, a "Passphrase" text field, a "Start Date (MM/DD/YYYY)" field with the value "09/14/2015", and a "Stop Date (MM/DD/YYYY)" field with the value "09/13/2015". At the bottom of the form are three buttons: "E-mail Passphrase", "Reset PIN", and "Delete Proxy Relationship".

Click reset the proxy's pin to send a new system generated password to the proxy.

Removing a Proxy

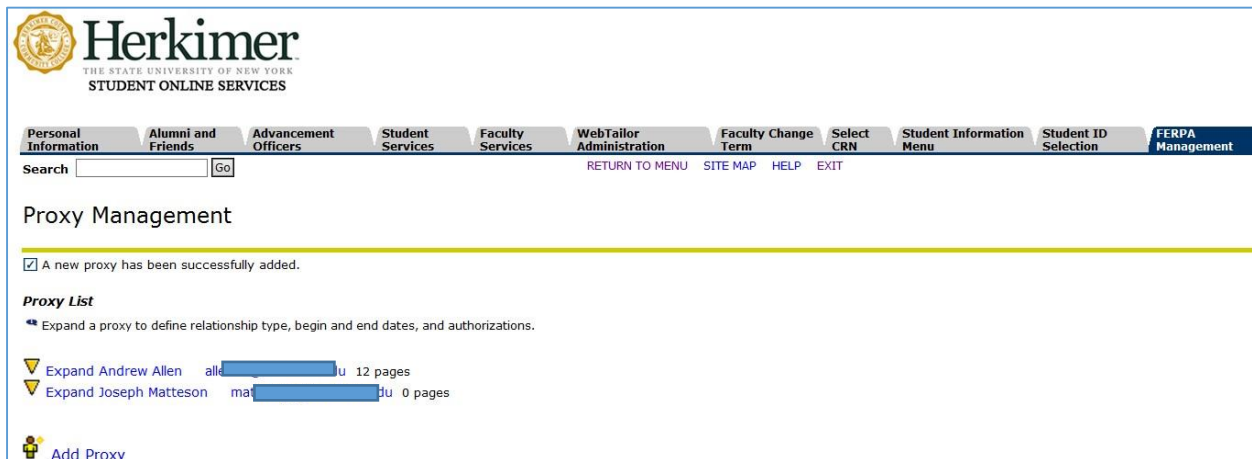
Sign into [MyHerkimer](#)

Using the Student Online Services link, sign into Student Online Services.

To get into the PROXY menu, click the last tab on the tab bar “FERPA Management”.

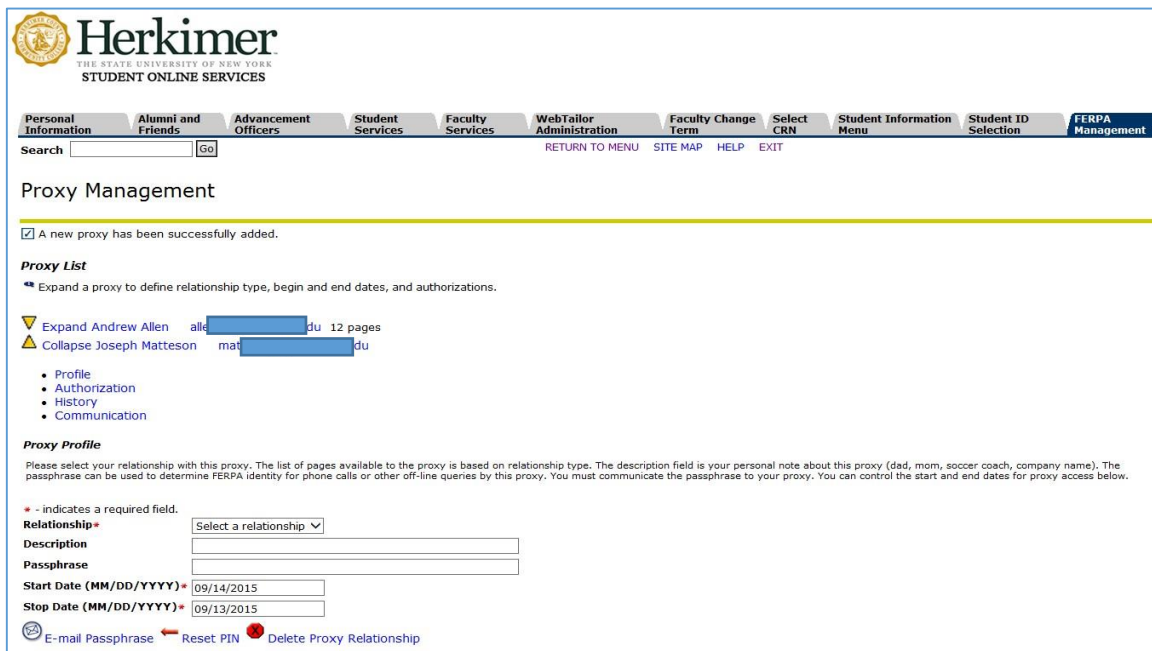
This will bring you to the Proxy Access Menu

Click on Proxy Management to bring up the Proxy Management menu.



The screenshot shows the Herkimer Student Online Services interface. At the top, there is a navigation bar with tabs for Personal Information, Alumni and Friends, Advancement Officers, Student Services, Faculty Services, WebTailor Administration, Faculty Change Term, Select CRN, Student Information Menu, Student ID Selection, and FERPA Management. Below the navigation bar is a search field and a "Go" button. The main content area is titled "Proxy Management" and features a green success message: "A new proxy has been successfully added." Below this is a "Proxy List" section with a sub-header "Expand a proxy to define relationship type, begin and end dates, and authorizations." The list contains two entries: "Expand Andrew Allen" with a dropdown arrow and "12 pages" next to it, and "Expand Joseph Matteson" with a dropdown arrow and "0 pages" next to it. At the bottom left of the proxy list is an "Add Proxy" button with a plus icon.

On the Proxy Management Menu, select the Proxy you want to update.



The screenshot shows the Herkimer Student Online Services interface, similar to the previous one. The "Proxy List" section now shows "Expand Andrew Allen" with a dropdown arrow and "12 pages" next to it, and "Collapse Joseph Matteson" with a dropdown arrow and "0 pages" next to it. Below the proxy list is a "Proxy Profile" section with a sub-header "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." Below this is a form with several fields: "Relationship" with a dropdown menu, "Description" with a text input field, "Passphrase" with a text input field, "Start Date (MM/DD/YYYY)" with a date input field showing "09/14/2015", and "Stop Date (MM/DD/YYYY)" with a date input field showing "09/13/2015". At the bottom of the form are three buttons: "E-mail Passphrase" with an envelope icon, "Reset PIN" with a red circular arrow icon, and "Delete Proxy Relationship" with a red circle with a slash icon.

Click Delete Proxy Relationship.

Before removing the Proxy, the system will verify the request

Are you sure you want to delete this Proxy relationship?



Clicking OK will delete the proxy from the account.

Clicking Cancel will close the window without performing any action.