# **FERPA** usage instructions

- What is FERPA?
  - FERPA stands for the Family Education Rights and Privacy Act, get more information <u>here</u>.
- 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?
  - $\circ$   $\;$  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 2021 to Spring 2022 the start and end date must fall between June 1, 2021, and May 31, 2022.

Additional questions, please contact the Dean of Students

- Phone: (315)866-0300 ext. 8276
- E-mail: <u>dean\_of\_students@HERKIMER.EDU</u>

### **Navigating to FERPA Management**

- 1. Sign into MyHerkimer
- 2. Using the Student Online Services link, sign into Student Online Services.



- 3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management."
- 4. This will bring you to the Proxy Access Menu

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Proxy Acce	ss Menu											
Please note, the t	erm 'Action PIN' ref	ers to your FERPA	Password.									
Proxy Manager This page allows you	nent to add proxy access to s	elected Banner Web pa	iges. Anyone with an e-mail addr	ress can be a proxy.								

#### Assign a new proxy

- 1. Sign into MyHerkimer
- 2. Using the Student Online Services link, sign into Student Online Services.
- 3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".
- 4. This will bring you to the Proxy Access Menu
- 5. Click on Proxy Management to bring up the Add\Edit options.
- 6. If a Proxy already exists, they will be listed with their name and the number of accesses granted.
- 7. To Add a New Proxy, click on the Add Proxy option



Personal Information Student Services Financial Aid FERPA Management
Search Go
Proxy Management
Proxy List
Expand a proxy to define relationship type, begin and end dates, and authorizations.
Your proxy list is empty.
<b>Add a Proxy</b> Add a new proxy using the form below. Then edit their profile and authorization settings to enable appropriate access.
<ul> <li>- indicates a required field</li> </ul>
First Name*
Last Name*
E-mail Address*
Verify E-mail Address*
Add Proxy
RELEASE: 8.8.0.1

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- 8. In the newly presented boxes:
  - a. Enter the First Name of the individual who will be the Proxy
  - b. Enter the Last Name of the individual who will be the Proxy
  - c. Enter the Email address that will be associated with the Proxy, then verify the entry.
  - d. Click the Add Proxy button will:
    - i. Verify the information was entered correctly If the information is verified, the entity will be added to the list of Proxies.
- 9. 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.

#### **Updating Proxy Privileges**

- 1. Sign into MyHerkimer
- 2. Using the Student Online Services link, sign into Student Online Services.
- 3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".
- 4. This will bring you to the Proxy Access Menu
- 5. Click on Proxy Management to bring up the Proxy Management menu.
- 6. On the Proxy Management menu, select the Proxy you want to update.

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- a. You will need to select a relationship for the person.
- b. Each time the relationship field is updated the Proxy will receive an email Showing the new relationship selected.
- c. 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).
- d. The Passphrase is used by the proxy when speaking to the college.
  - i. Note: The passphrase is not sent automatically. The student needs to click on Send Passphrase.
- e. The start and end dates note the time 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**

1. Sign into MyHerkimer

Herkimer

- 2. Using the Student Online Services link, sign into Student Online Services.
- 3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".
- 4. This will bring you to the Proxy Access Menu
- 5. Click on Proxy Management to bring up the Proxy Management menu.
- 6. On the Proxy Management Menu, select the Proxy you want to update.
- 7. There are four options to choose from

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- b. Authorization Determine access
- c. History Show changes
- d. Communication Email communication history

#### **Resetting Proxy's Pin**

- 1. Sign into <u>MyHerkimer</u>
- 2. Using the Student Online Services link, sign into Student Online Services.
- 3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".
- 4. This will bring you to the Proxy Access Menu
- 5. Click on Proxy Management to bring up the Proxy Management menu.
- 6. On the Proxy Management menu, select the Proxy you wish to update.
- 7. Click reset the proxy's pin to send a new system generated password to the proxy.

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1.1.1	STUDENT ONLINE SERVICES

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## **Removing a Proxy**

- 1. Sign into MyHerkimer
- 2. Using the Student Online Services link, sign into Student Online Services.
- 3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".
- 4. This will bring you to the Proxy Access Menu
- 5. Click on Proxy Management to bring up the Proxy Management menu.
- 6. On the Proxy Management menu, select the Proxy you wish to update.
- 7. Click Delete Proxy Relationship.

	Herkimer
1.10	STUDENT ONLINE SERVICES

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- 8. Before removing the Proxy, the system will verify the request
  - a. Clicking OK will delete the proxy from the account.
  - b. Clicking Cancel will close the window without performing any action.