# Banner Web Proxy Access Instructions

Banner Web Proxy allows a student to authorize access to confidential information in Banner Web to a specific person. Students can authorize another person, like a parent or guardian, access to specifically chosen information (i.e. student schedule, pay bill, grades, etc.). The authorized person is called a "Proxy".

> **If you have any questions on setting up Banner Web Proxy Access**, please contact the Registration & Records Office (A-201) at (716) 614-6250 or email at registrar@niagaracc.suny.edu

STEP 1: To be completed by the STUDENT

<u>Students</u> must follow the steps outlined below to authorize access to their chosen proxy. All steps need to be completed before a proxy can begin to set up their account.
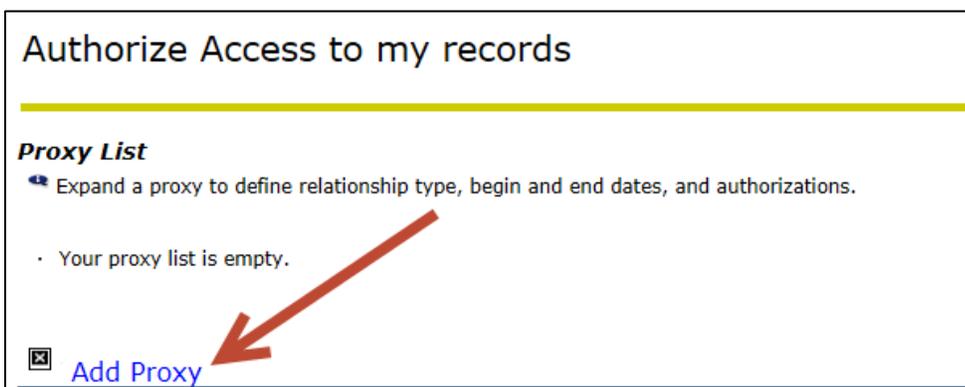
1. Log into Banner Web by clicking **"Enter Secure Area"** and entering your User ID (@00------) and PIN

2. Click on the **"Authorize Access to My Records"** tab located at the top of the Main Menu page
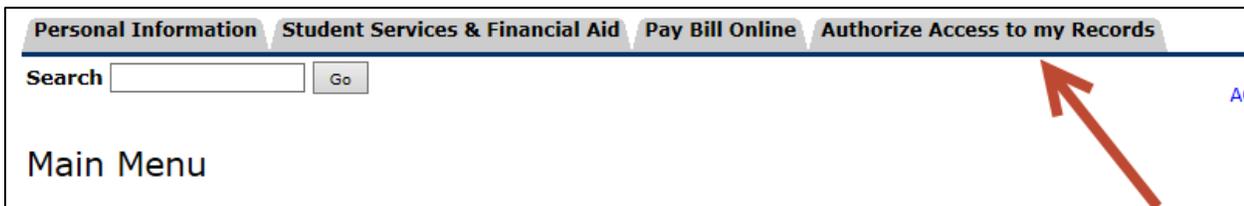
3. Click on **"Proxy Management"**
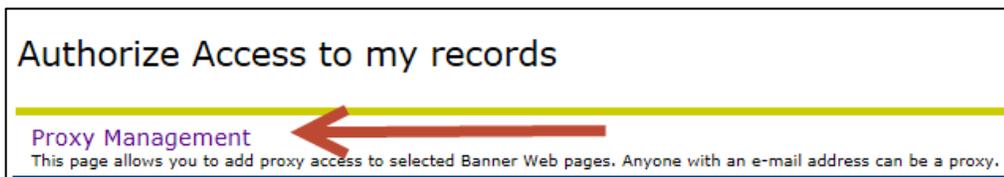
4. Click on **"Add Proxy"**

5. Type in the first name, last name, and e-mail address of the chosen proxy. Then click "Add Proxy". Once complete, your screen will say *"A new proxy has been successfully added"*

6. Click on **"Expand Jane Doe"** to show more options. **Please note**: it will show your chosen proxy's name, not Jane Doe.

7. Complete the Proxy Profile areas (shown below):
   a. **Relationship** – Please choose a relationship from the drop-down menu

   b. **Description** – Include a description of the proxy, i.e. Mom.

   c. **Passphrase** – Please create a Passphrase for the proxy. This must be a four (4) digit number. Once you have entered a passphrase, click on "E-mail Passphrase" to send an e-mail to the proxy to inform them of the passphrase. Passphrase is <u>NOT</u> the PIN that a Proxy will use to access information.

d. **Determine the access start and stop dates** for the proxy. Students can choose however long they would like to provide access to their information.
If you would like the access to continue on indefinitely, please enter the following stop date: 12/31/2099. You can always change the stop date in the future to end access, if needed.

Proxy Management

☑ A new proxy has been successfully added.

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

⚠ Collapse Jane Doe   janedoe@email.com

- Profile
- Authorization
- History
- Communication

Proxy Profile
Please select your relationship with this proxy. The pages that are available to the proxy is based on the relationsh
dad, mom, soccer coach, company name, etc). You must also enter a Passphrase and it must be a four (4) digit nu
an email notification of the passphrase to your selected proxy. If you would like to provide access to your records

Special profile tab information text dealing with parents.

✱ - indicates a required field.

Relationship✱	Parent or Legal Guardian ⌄	*Please choose a relationship type from the drop-down list*
Description	Mom	*Include a description of the Proxy*
Passphrase	1234	
Start Date (MM/DD/YYYY)✱	05/01/2015	*Create a Passphrase - Must be a four (4) digit number*
Stop Date (MM/DD/YYYY)✱	10/28/2099 ✕	*Change the year under Stop Date to "2099" to provide indefinite access.*

✉ E-mail Passphrase ⬅ Reset PIN

8. Click "E-mail Passphrase" to send the Passphrase information to your designated proxy.

9. Click on **"Authorization"** at the top under Proxy List. This is where the student will give permission for what information the proxy can have access to. Students can give access to all the information listed or choose options individually by checking the boxes.

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 th

Special authorization tab information text dealing with parents.

☑ Proxy Access for Parent Check to Select or Deselect ALL items below.
  ☑ View Schedule/Bill
  ☑ View Emergency Contacts
  ☑ E-mail Addresses
  ☑ Student Detail Schedule
  ☑ Academic Transcript
  ☑ Pay Bill
  ☑ View Addresses and Phones
  ☑ Financial Aid Status
  ☑ Financial Aid Eligibility
  ☑ Financial Aid Award
  ☑ Final Grades
  ☑ View Holds

} *The student can select all options or can choose which individual options they would like the proxy to have access to.*

10. Students can click on **"History"** to view a history of authorizations that they have approved for this specific proxy or **"Communication"** to view a log of the various e-mails that have been sent to the proxy and can be resent from here by the student if necessary.

Authorize Access to my records

☑ A new proxy has been successfully added.

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

Collapse Jane Doe   janedoe@email.com

- Profile
- Authorization
- History
- Communication

STEP 2: To be completed by the Proxy

The authorized proxy must follow the steps outlined below to access their student's authorized information.

1. **Once the student has completed Step 1**, the designated proxy will receive an e-mail titled **"New Proxy Identity"**. The proxy will need to click on the URL provided in the e-mail and enter the **"Action Password"** that was provided in the e-mail. Then click Submit.

The e-mail you received contained an Action Link (which you have used to get here) and an Action Password used to ver your new PIN.

✱ - indicates a required field.

Action Password✱ [   ] [Submit]

RELEASE: 8.7

2. The proxy will then enter their email address, old PIN (this is the Action Password from the email), create a new PIN (must be six characters), and save.

Reset PIN

Enter your new PIN twice. A PIN can be a number, password or passphrase. For higher security, use a combination of uppercase letters, lowercase letters and numbers.

✱ - indicates a required field.
Minimum PIN length: 6 Maximum PIN length: 6.

Enter e-mail address✱ [janedoe@email.com]

Enter Old PIN✱ [••••••••]   Your "Old PIN" will be your Action Password found in your email.

Enter New PIN✱ [••••••]

Validate PIN✱ [••••••]   Your "New PIN" should a be six (6) character PIN that you create.

[Save]

3. The proxy will then be taken to the **Proxy Access Home Page**, where they must complete all required areas in the Proxy Profile and save. Once you have saved, it will read *"Changes have been saved"* at the top of the Proxy Access Screen

Proxy Profile
🔊 Please keep your Banner Web proxy information up-to-date.   📄Click here to change your PIN

* - indicates a required field.

Field	Value
Salutation	
First Name *	Jane
Middle Name	
Last Name *	Doe
Name Suffix	
Nickname	
E Mail Address *	Janedoe@email.com
Phone Area Code	
Phone Number	
Phone Extension	
Mailing Address Line 1 *	123 Any St
Mailing Address Line 2	
Mailing Address Line 3	
City *	Any City
State *	New York
Zipcode *	12354 ✕
Nation *	United States of America
Gender	Select Gender
Birthdate (MM/DD/YYYY)	
SSN/SIN/TIN	

Be sure you fill in ALL required information!

Save

4. The proxy can now click on the student's name in blue located at the top of the page to access the authorized student information. You will then need to scroll to the bottom of the page to access the options authorized to you.

Proxy Authorizations
🔊 The following Banner Web page links have been specifically authorized for your use. access.

Proxy Access for Parent for ▨▨▨▨

View Schedule/Bill
View Emergency Contacts
E-mail Addresses
Student Detail Schedule
Academic Transcript
Pay Bill
View Addresses and Phones
Financial Aid Status
Financial Aid Eligibility
Financial Aid Award
Final Grades
View Holds

Click on any of these options to access that student information.

5. When the proxy clicks on any of the options authorized to them, they will see a message at the top that says they are viewing the student's information.

View Holds   ***You are viewing ▨▨▨ ▨▨▨ information***

🔊
Please note that some holds are sensitive and may not display on this page.

⚠ No holds exist on your record.

Please note: The proxy should save all emails they receive for future use.

Proxy PIN Resets

- **If a proxy forgets their PIN**, the proxy must contact the <u>STUDENT</u>, who can reset the PIN online through Banner Web. Once the student resets the PIN, the Proxy will receive an email with the updated information.

- **The Registration & Records Office is NOT able to access or reset a PIN for a Proxy.** This can only be done by the student.
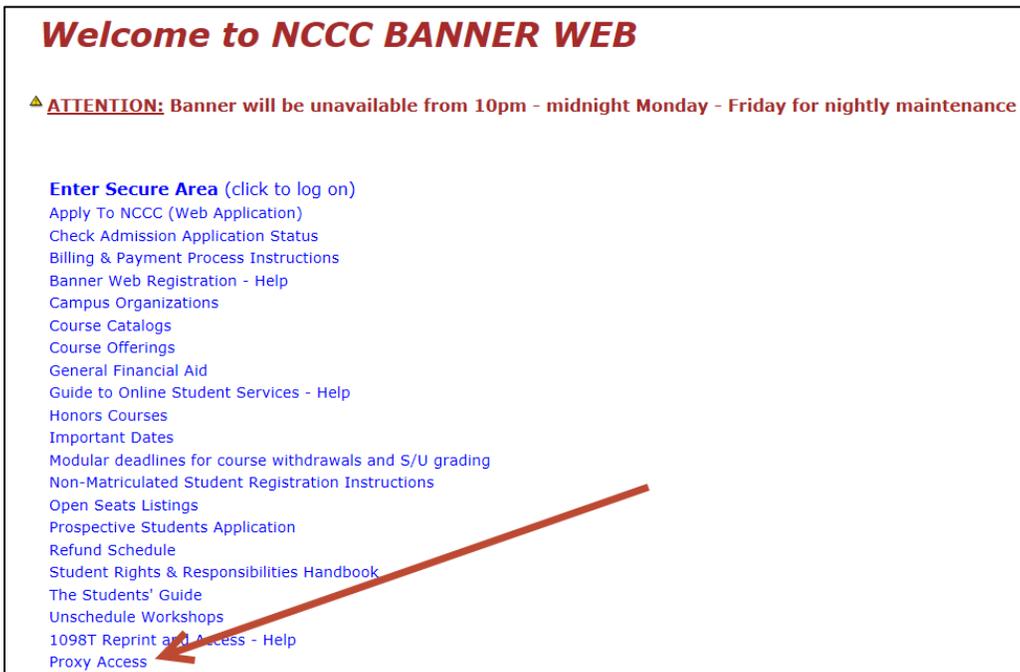
How to Access the Proxy Login Screen

- For future access, the proxy can access their student's authorized information by clicking on **"Proxy Access"** on the <u>Banner Web Welcome page</u>. **The proxy will be required to enter their email address and PIN.**

Ending Proxy Access

The student has the option to end or delete a proxy's access at any time by following these steps:

1. Log into <u>Banner Web</u> by clicking **"Enter Secure Area"** and entering your User ID (@00------) and PIN

2. Click on the **"Authorize Access to My Records"** tab located at the top of the Main Menu page
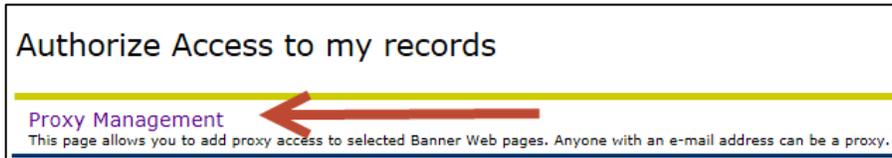
3. Click on **"Proxy Management"**

Authorize Access to my records

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.

4. Click on **"Expand Jane Doe"** to show more options. **Please note**: it will show your chosen proxy's name, not Jane Doe.

Authorize Access to my records

☑ A new proxy has been successfully added.

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

☒ Expand Jane Doe   janedoe@email.com 0 pages ☒

☒ Add Proxy
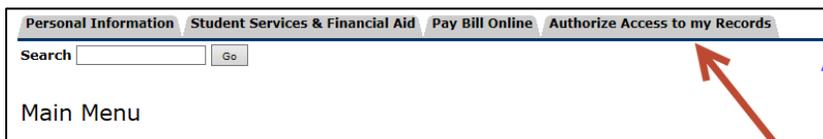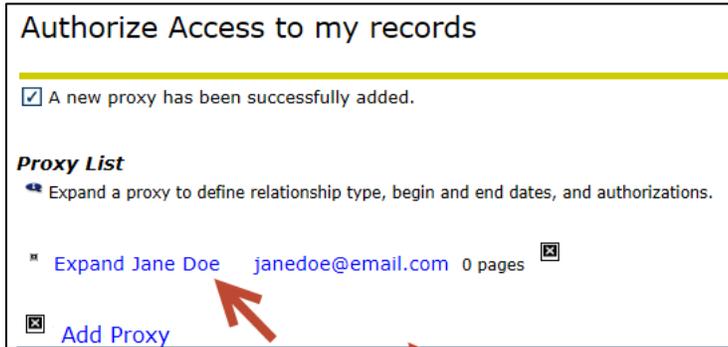
5. In the Proxy Profile, the student can change the Stop Date to today's date to end a Proxy's access to your records.

Proxy Management

☑ A new proxy has been successfully added.

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

⚠ Collapse Jane Doe   janedoe@email.com

• Profile
• Authorization
• History
• Communication

Proxy Profile
Please select your relationship with this proxy. The pages that are available to the proxy is based on the relationship
dad, mom, soccer coach, company name, etc). You must also enter a Passphrase and it must be a four (4) digit num
an email notification of the passphrase to your selected proxy. If you would like to provide access to your records to

Special profile tab information text dealing with parents.

* - indicates a required field.

Relationship*   Parent or Legal Guardian ▾

Description   Mom

Passphrase   1234

Start Date (MM/DD/YYYY)*   05/01/2015

Stop Date (MM/DD/YYYY)*   05/15/2015   ✕   To end a Proxy's access to your
                                                  information, change the stop date to
                                                  today's date.

📧 E-mail Passphrase ←   Reset PIN