

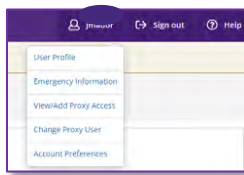
STUDENT SELF-SERVICE PROXY – STUDENT GUIDE

Proxy Access provides an opportunity for you to grant online access to financial information using Student Self-Service. This is called granting “proxy access,” and the other person is referred to as the proxy. Some more common scenarios are granting a parent or spouse access to a student’s information. Access is granted by the student, who must provide a valid e-mail address as well as other information for the designated proxy.

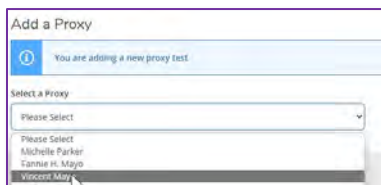
This authorization only gives the university permission to release the information the student granted access to through the Student Self-Service portal. Because separate systems are used, students must also authorize users to access the [Student Account Center](#). The University requires that a separate [Consent for Access to Educational Records](#) form also be completed for the university to speak with other individuals pertaining to your records. Any and all changes in access must be completed for records consent, online proxy access and Student Accounts Center authorization.

TO ADD PROXY

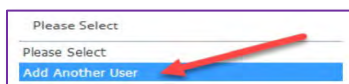
1. Click on your Username in upper right corner and select View/Add Proxy Access



2. Under Select a Proxy, select the Proxy you wish to grant access if they are already listed



3. If the person you are granting access for is not listed, choose 'Add Another User'

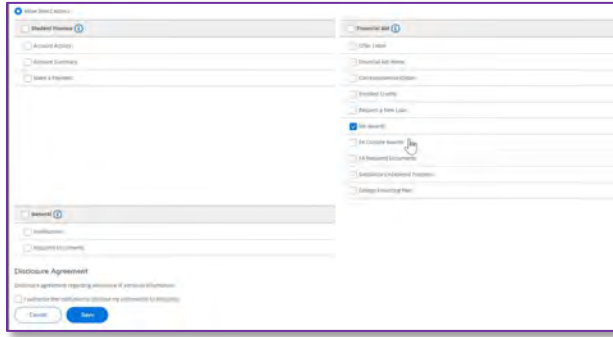


4. To add another user, you must provide the person’s:
 - a) First Name, Last Name, Email address, Email type, Phone number, Phone type, Birth Date, and Relationship
 - b) All other fields are optional

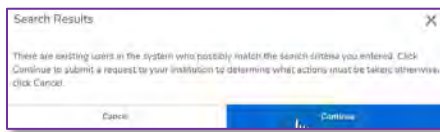
A screenshot of the 'Add Another User' form. The form is titled 'Add Another User' and has a dropdown menu for 'Select a Proxy'. Below this is a grid of input fields for personal information. The fields are: 'First Name *', 'Middle Name', 'Last Name *', 'Suffix', 'Former Middle Name', 'Former Last Name', 'Email Address *', 'Email Type', 'Phone *', 'Phone Extension', 'Phone Type *', and 'Birth Date *'. Each field has a 'Please Select' or 'Please Enter' prompt.

5. Choose the Access to grant that person
 - a) 'Allow Complete Access' automatically gives access to all Categories and Items
 - b) Selecting by Categories (Financial Planning, Student Accounts, and General) gives access to all items within that category
 - c) Selecting on individual items only gives access to that item.

6. Once access levels are selected, review the disclosure agreement, click on acknowledgement and authorization of disclosure agreement, and click the Submit button.



7. If the person you are granting access to already appears to have a match within our student information system, you will receive the following notice.



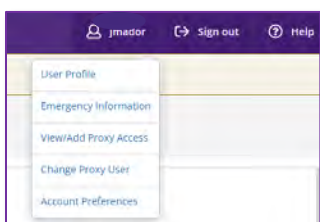
- a) Click continue for the University to review the records and merge them if it is determined that they are the same person
- b) During the review time, you will see the record status as pending



- c) We will review the record and, if necessary, merge the records together
 - d) Once resolved, the new proxy will receive log in information and you will see their status updated with an effective date
8. Be sure to also provide your Proxy access to the [Student Account Center](#) and complete the [Consent for Access to Educational Records](#) form to allow the University to speak with them about your financial, academic, and student records
 9. Once access has been granted,
 - a) If your proxy is a new account, they will receive an email indicating you granted them online access and providing them with their username and link to the Student Self-Service website. They will also receive a second email with a temporary password to access their account for the first time
 - b) If your proxy has an existing HPU account (current student or employee of the University, for example), they will receive an email that you have granted them access and provides them with the link to the Student Self-Service website
 - c) You will also receive an email notification that access has been granted

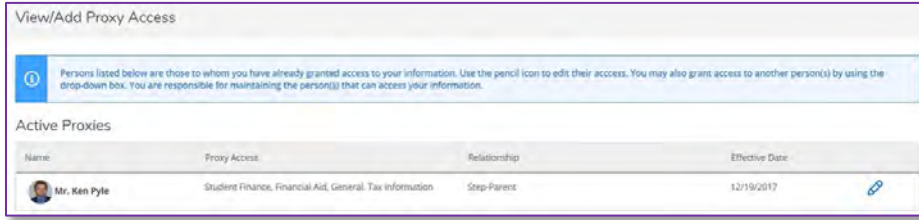
TO EDIT AN EXISTING PROXY

- A. Click on Username in upper right corner
 1. Click on View/Add Proxy Access

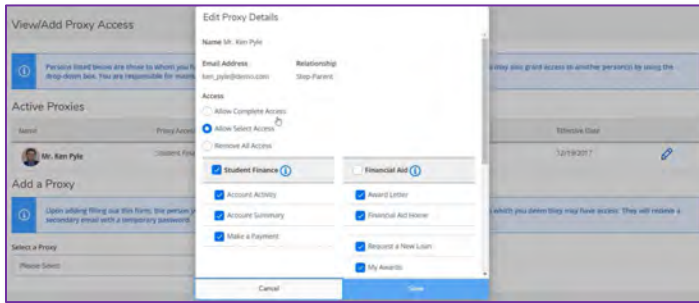


B. Under Active Proxies

1. Select pencil icon for the Proxy you wish to edit



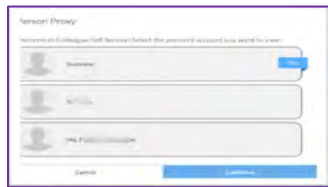
C. You can edit the Proxy's access to add or remove access.



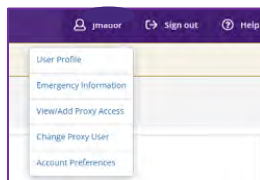
1. You can allow complete access, remove all access, or select access by category or by individual item
2. Once adjustments have been made, select Save to update the access
3. Remember to also update this person's [Student Account Center](#) access and [Consent for Access to Educational Records](#)
4. Your proxy will receive an email notification that changes in their access have been made.

D. If you are given proxy access

1. As a student, if you are given proxy access to another student's account, you will be given an option to choose the account you wish to view upon logging into Student Self-Service



2. If you accessed your account, you can switch accounts by clicking on your username in the upper right corner and selecting 'Change Proxy User'



3. If you accessed the proxy account, you can switch accounts by clicking on the Change User button on the top of the screen



FREQUENTLY ASKED QUESTIONS BY STUDENTS

Which students can set up Proxy Access?

Any student has the ability to set up Proxy Access. The View/Add Proxy link is located under the User Options in [Student Self-Service](#). It can also be accessed by clicking on your username at the top of screen.

Can a student specify multiple Proxies?

Yes, a student can specify multiple proxies. Each proxy can have different levels of access to the student's financial information.

Can someone be assigned as a proxy for multiple students?

Yes, someone can be assigned as a proxy for multiple students. This is particularly useful in the case of siblings attending HPU.

Can a proxy call High Point University if they have questions about the proxy process?

Yes, you can contact the HPU IT Service Center 336-841-4357 or servicedesk@highpoint.edu for assistance. They are available Monday-Friday from 7:30am-6:00pm.

What does a student do when they no longer want a proxy to have access?

A student can log into Student Self-Service, click on their username and then click View/Add Proxy Access. Then click the pencil on the right of the Proxy's name to edit or remove the Proxy's access rights. Please note, that this only updates Proxy access to online financial information within Student Self-Service. To change the University's ability to speak with individuals pertaining to your financial, academic, and student records you must also provide an updated [Consent for Access to Educational Records](#) form. Students must also update their authorized users setting within the Student Account Center to change the access there as well.

Will my proxy be notified if a modification to access is made including removing authorization?

Yes, an e-mail will be sent to the proxy if the student chooses to modify or remove proxy's access to financial information online within Student Self-Service.

What should be done if my proxy forgets their username and/or password?

Please contact the HPU IT Service Center 336-841-4357 or servicedesk@highpoint.edu for assistance. They are available Monday-Friday from 7:30am-6:00pm.

Can HPU staff make updates to what a proxy can view for me?

No. University staff cannot change the permission settings for proxies. Only the student granting the proxy access can change the permissions that are granted.

Can my proxy pay my tuition bill online?

Because we use a separate vendor for our online payments and student accounts' information, you will also need to give your proxy access to our Student Account Center as an authorized user. Instructions for setting up authorized users as well as links to the Student Account Center for students and authorized users can be found on our <https://www.highpoint.edu/studentaccounts/> page. Students and proxies that are authorized users can also use helpful links listed within the Student Self-Service Student Accounts module to access the Student Accounts Center.

Office of Student Financial Planning
(336) 841-9124
finplan@highpoint.edu

Office of Student Accounts
(336) 841-9259
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