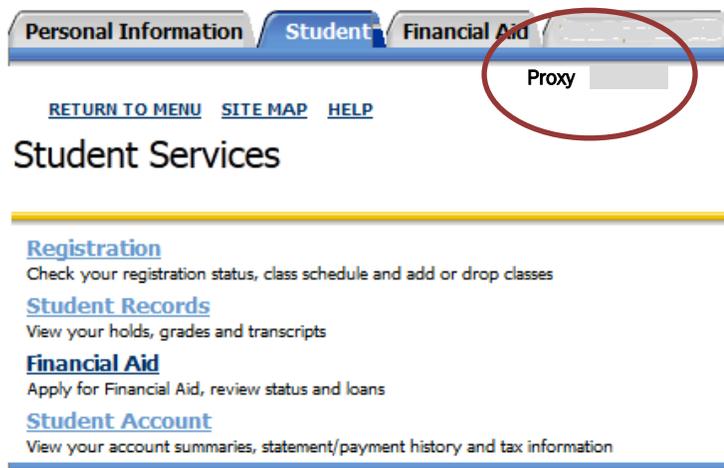# Proxy Management Information – Student Instructions

Students can grant others access to view certain pieces of information. This is called granting "proxy access," and the other person is referred to as your proxy (designee). Proxy Access places you, the student, in control of the entire process and allows you to authorize anyone with a valid e-mail address online access to your academic information.
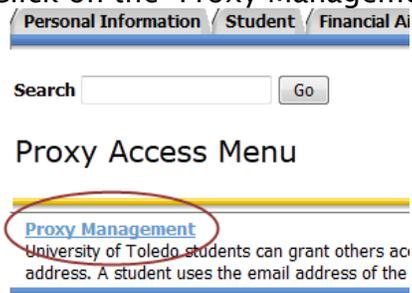
Creating a Proxy (designee)

To provide an individual electronic access to your academic information, you must first create a proxy account.

1. Log into your MyUT portal account

2. Click the Proxy link under the My Other Resources heading in the My Toolkit channel.

3. Click on the Proxy tab

4. Click on the "Proxy Management" link

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5. Click on the Add Proxy link

   Proxy Management

   Proxy List
   > Expand a proxy to define the relationship type, a begin and end dates, and to authorize information pages for your proxy to view. These steps must be taken for a new proxy.

   > Your proxy list is currently empty.

   Add Proxy

6. Enter the first name, last name, and e-mail address of the person you wish to grant proxy access. Each proxy must have a unique email address; you cannot have multiple proxy users attached to one email address. Proxy will use the email address you enter to access authorized pages. Please ensure the email address is entered correctly.

7. Click Add Proxy button

   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*	Mary
Last Name*	Rocket
E-mail Address*	mary.rocket@gmail.com
Verify E-mail Address*	mary.rocket@gmail.com

   [Add Proxy]

8. After adding the proxy you must select the relationship type. This step is required and must be completed before a student can authorize any access for the proxy.

9. Click the name of the proxy to expand it.

   Proxy Management

   > A new proxy has been successfully added.

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

   Expand Julie Quinonez   julie.quinonez@gmail.com 6 pages
   Expand Mary Rocket   mary.rocket321554@gmail.com 0 pages

   Add Proxy

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10. Select Relationship type of Proxy User. This is a required step.

11. The start and end dates will default in as 4 years. You can change them if you desire.

12. The system will automatically save this information.

13. Click on the Authorization tab and you will see all the access that you can extend to your proxy. Click on the box to grant access to an area of information. The system will automatically save this information. After you designate the items you wish to grant to your proxy, select the E-Mail Authorizations icon to the right. This will generate an e-mail to your proxy indicating what you have authorized him/her to view.
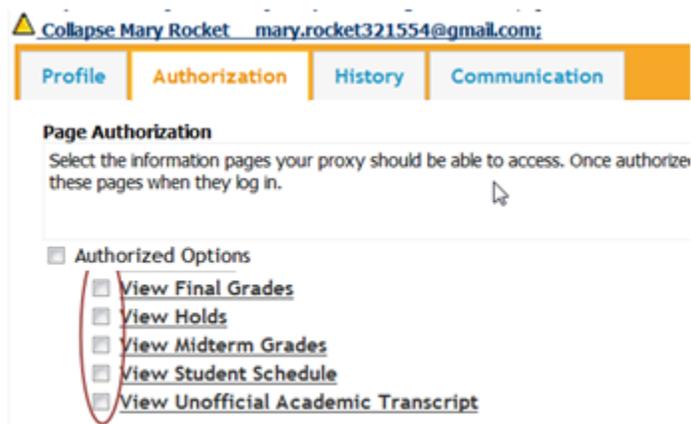
You have completed the necessary steps to create proxy access.

14. The Proxy (designee) will receive an e-mail notifying him/her that the account has been created. The e-mail will provide the proxy with a user name (the relevant e-mail address) and a temporary PIN/Action Password. A link will be provided for the proxy to complete the registration/authentication process.

15. After completing the authentication process, the proxy will be able to log on and view the information for which you authorized.

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16. Questions regarding Proxy Access may be directed to proxy@utoledo.edu.

- If a Proxy (designee) has a question about the functionality of Proxy Access, the proxy should first check the Treasurer's website for user guide and additional proxy information.
- The Help Desk, at (419) 530-2400, can be called for assistance in setting up or activating proxy access.
- University staff cannot make updates to what a Proxy (designee) can view for a student, or provide the PIN to a proxy who has forgotten it.
- Proxy (designee) users gain access only when the student completes the required steps to grant proxy access.

Additional Features of Proxy Management

Review History

To check the history of authorizations for your proxy, expand the proxy name and click the History tab. This will provide the activity related to this specific proxy user.

Review E-mail communication

To check the communication trail for your proxy, expand the proxy name and click on the Communications tab. This will provide the communications that have been sent to your proxy user and provides you the opportunity to resend certain e-mail communications.

Revise Proxy (Designee) Access

To change or end the access of your proxy, change the Stop date to the date you want the change to occur on the "Profile" tab or remove all checkmarks on the "Authorization" tab. The proxy will no longer see your name when the proxy logs in to the Proxy Access account. There is no automatic notification sent when a modification to those items is made.