

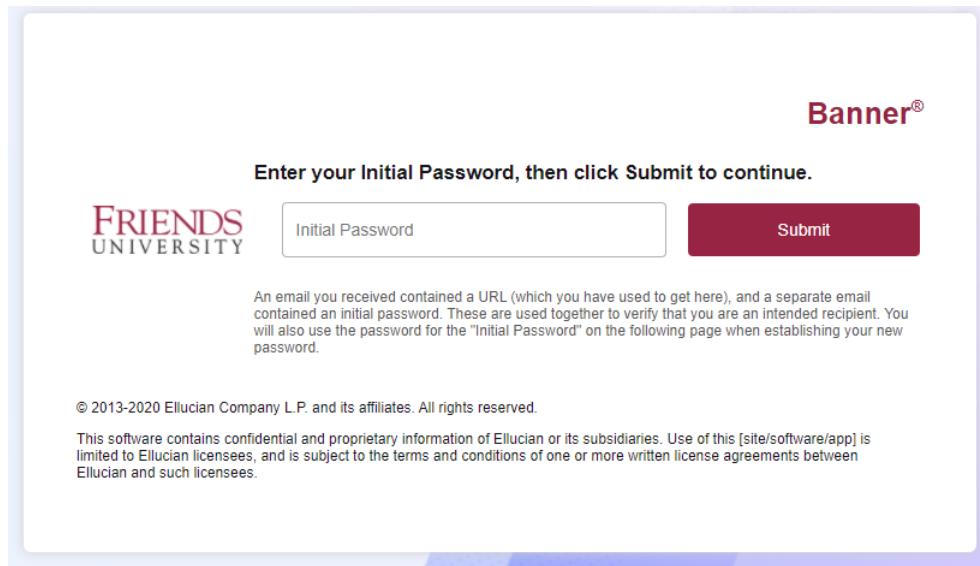
Accessing Records as a Proxy – Instructions for Proxies

When a student creates an individual as a Proxy in the Student Proxy Management system, that individual will receive three emails. Each needs to be read carefully; note that one is marked “Start Here”.

The first two emails will provide a temporary link and a temporary **Initial** password you will use to establish your account and access the system.

The third email provides the link you will use for future access to the system; you may also want to bookmark the site in your browser.

1. Click on the link in the “Start Here” email and enter the Initial password that was sent in a separate email.



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Enter your Initial Password, then click **Submit** to continue.

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Initial Password

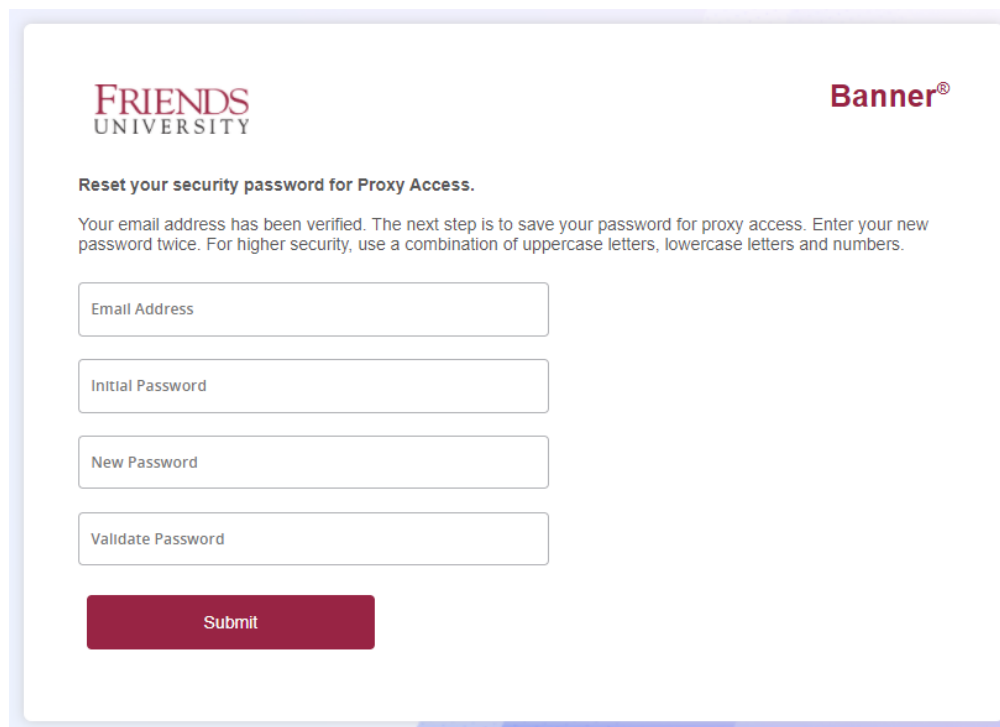
Submit

An email you received contained a URL (which you have used to get here), and a separate email contained an initial password. These are used together to verify that you are an intended recipient. You will also use the password for the "Initial Password" on the following page when establishing your new password.

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2. Enter your Email Address, Initial password again and then type a new password in the last two fields.



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Reset your security password for Proxy Access.

Your email address has been verified. The next step is to save your password for proxy access. Enter your new password twice. For higher security, use a combination of uppercase letters, lowercase letters and numbers.

Email Address

Initial Password

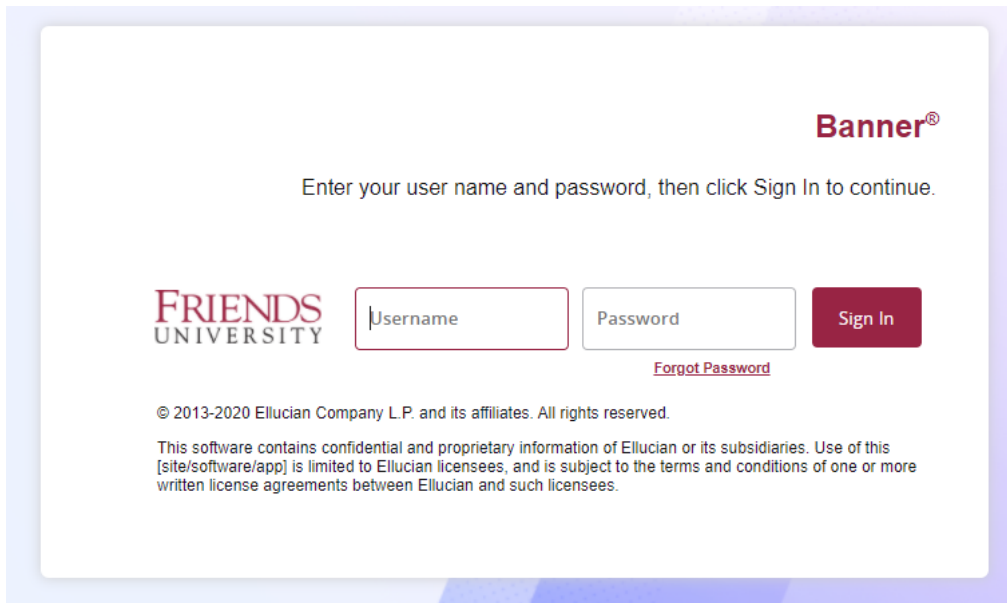
New Password

Validate Password

Submit

3. Sign in with your credentials

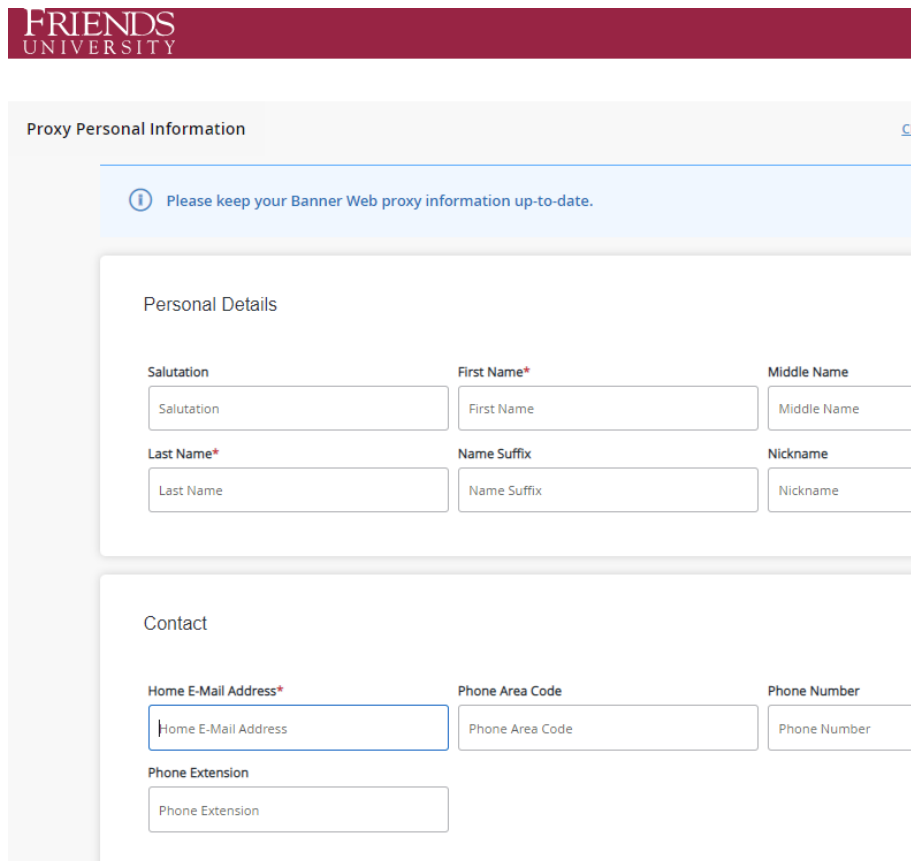
- a. Your username is your email address and use the password you just created.



The image shows a login screen for Banner. At the top right is the Banner logo. The main heading says "Enter your user name and password, then click Sign In to continue." Below this are three input fields: "Username" (with a cursor), "Password", and a "Sign In" button. A "Forgot Password" link is located below the password field. At the bottom, there is a copyright notice: "© 2013-2020 Ellucian Company L.P. and its affiliates. All rights reserved." and a disclaimer: "This software contains confidential and proprietary information of Ellucian or its subsidiaries. Use of this [site/software/app] is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and such licensees."

4. Enter information into the Proxy Profile.

- a. You must fill out all required fields that have an asterisks and click Submit. You can update this information any time you enter the system.



The image shows the "Proxy Personal Information" form in Banner. At the top is the Friends University logo. Below the title is a "Click" link. A blue information box contains the text: "Please keep your Banner Web proxy information up-to-date." The form is divided into two sections: "Personal Details" and "Contact".

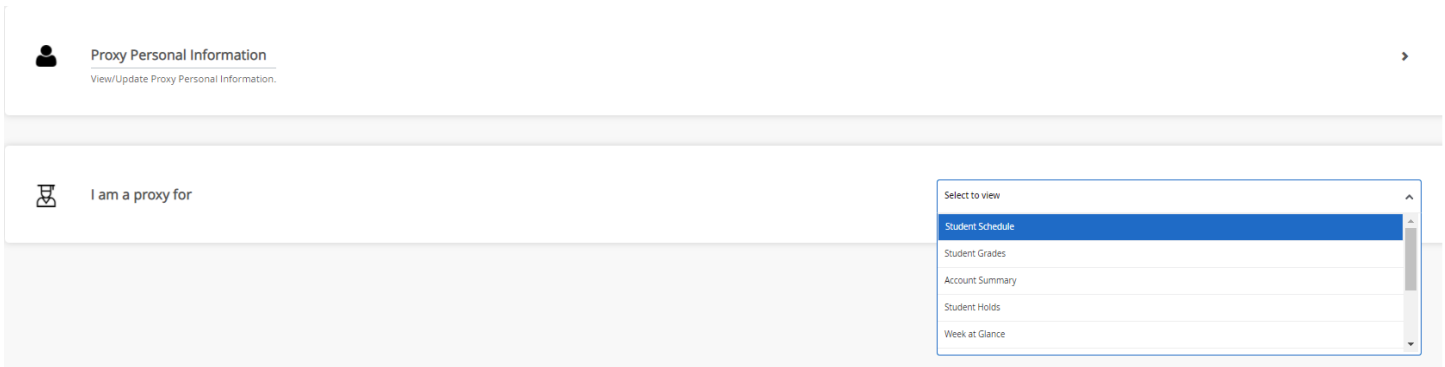
Personal Details

Salutation	First Name*	Middle Name
Salutation	First Name	Middle Name
Last Name*	Name Suffix	Nickname
Last Name	Name Suffix	Nickname

Contact

Home E-Mail Address*	Phone Area Code	Phone Number
Home E-Mail Address	Phone Area Code	Phone Number
Phone Extension		
Phone Extension		

5. Use the drop down menu to access the proxy pages that the student has granted to you.



6. Return to this webpage to access the Proxy system in the future.

- a. The webpage can be found on the Friends.edu website, we recommended that you save this page in your browser to quickly access it in the future.

<https://www.friends.edu/students/registrar/granting-student-record-access-proxy/>

- b. You will select the link “Proxy Access System” at the bottom of the page. There you will enter your email address and the Proxy password you created. If you need to reset your password, you can click Forgot Password or have your student send you a password reset link.

7. Review additional Proxy emails you receive.

- a. The Proxy system will send emails listing the data you entered into your profile, the information to which you have been given access, and any changes the student makes to your authorizations. Your student will need to notify you of the **Passphrase** they created, which will be required for Friends University to speak with you about the records the student has authorized. The student can give Friends University permission to speak with you when they set you up as a proxy. **This will only apply to the offices of the Registrar, Financial Aid and Student Accounts and the proxy must know the passphrase.**

Establishing a passphrase does not guarantee that information requested can be released. Information directly related to the access granted by the student may be discussed. However, additional information about his/her student record or financial information may not be discussed if it is determined that it is not related to, or a part of, what has been authorized by the student.