

HOW TO SET UP PROXY ACCESS

OVERVIEW

If you would like other, trusted individuals to have access to certain aspects of your student account, you can set up proxy access. The **View/Add Proxy Access** page in Student Self-Service allows you to add a proxy for anyone connected to you in the Marywood system (e.g. parents) or other users. Once you add a proxy, they will appear in your **Active Proxies** for you to revoke permissions at any time. You can choose whether to provide **viewing or editing access** for each proxy. Follow the instructions below to set up proxy access on your account.

By adding a proxy, you are authorizing access to sensitive and confidential information. Make sure that anyone you add is someone you want to have access to this confidential information.

SETTING UP PROXY ACCESS

ACCESSING THE VIEW/ADD PROXY ACCESS PAGE

1. Navigate to the Marywood homepage, or www.marywood.edu.
2. In the gray bar at the bottom of the page, click **MarywoodYou**.

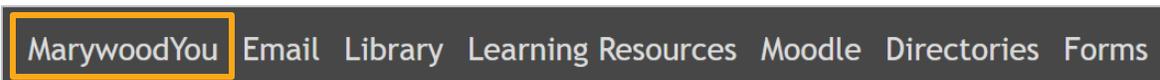


Figure 1: "MarywoodYou" on the Marywood Homepage

3. Log in with your student credentials.
 - These credentials are the same as you use for Brightspace.
 - If you can't remember your information, contact the Registrar's Office.

Figure 2: MarywoodYou Sign In Page

4. Select **Student** from the left sidebar. This opens the Student Portal.

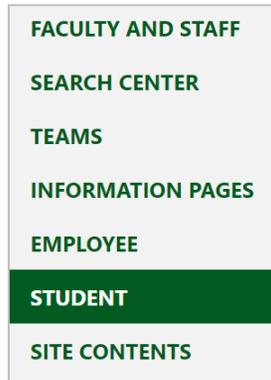


Figure 3: Link to Student Portal

5. In the left column under “Self-Service Menu,” click **Students** to see link options.



Figure 4: Students Heading under Self-Service

6. Click **Self Service** from the list of links. This will open Self Service in a new tab.

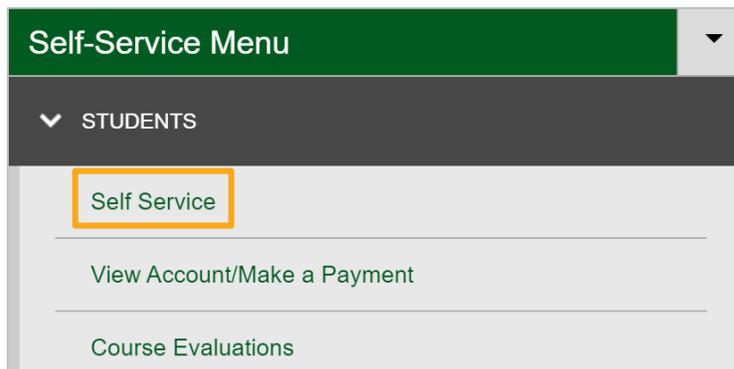


Figure 5: Self Service Link under Students Menu

7. Along the left side of your screen, click the **User Options** icon  to open the User Options menu.
 - If you have the window smaller than full screen, you may have to click the hamburger menu in the top left to see all icons and menus.

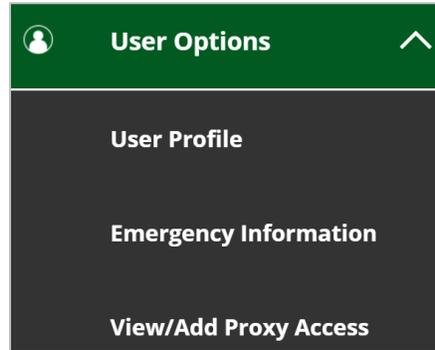


Figure 6: User Options Menu with View/Add Proxy Access

8. Select **View/Add Proxy Access**. The View/Add Proxy Access page opens.

ADDING PROXY ACCESS

As mentioned before, you can add proxy access for anyone you trust to have access to select areas of your student account. Before you can do this, however, we recommend reading the informational message at the top of the page, which reads:

“You may grant access to certain aspects of your student account to designated individuals. By doing so, you are authorizing access to confidential information which is protected under federal law. Allow proxy access to your account in the Add a Proxy section below. Please note that this access may be changed or denied at any time.”

Once you have read the message, you may begin the proxy process.

1. Under the **Add a Proxy** header, click the dropdown for **Select a Proxy**.

 A screenshot of a web form titled 'Add a Proxy'. The form has a light blue header bar with the title 'Add a Proxy'. Below the header, there is a blue box containing an information icon (a lowercase 'i' in a circle) and the text: 'Use the drop down box below to select a Proxy who has a relationship to you in the Marywood University student system.' Below this box, the text 'Select a Proxy' is displayed above a dropdown menu. The dropdown menu currently shows the text 'Please Select' and a small downward-pointing chevron on the right side.

Figure 7: Select a Proxy Dropdown

2. From the **Select a Proxy** dropdown, select an existing proxy or **Add Another User**.
 - If you select an existing proxy, you will see the existing email address and relationship that is already in the system.

Select a Proxy

Sam Mascaro

Email Address: busprocprojects@marywood.edu

Relationship: Grandchild

Figure 8: Selecting an Existing Proxy

- If you select **Add Another User**, contact fields populate upon selection, as seen below. Fill out as many fields as you can, paying special attention to required fields marked with an asterisk (*). The required fields are **First Name, Last Name, Email Address, Confirm Email Address, Email Type, and Relationship**.

Select a Proxy

Add Another User

First Name *
First Name

Middle Name
Middle Name

Last Name *
Last Name

Suffix
Please Select

Former Last Name
Former Last Name

Email Address *
Email Address

Confirm Email Address *
Email Address

Email Type *
Please Select

Phone
Phone

Phone Extension
Phone Extension

Phone Type
Please Select

Birth Date
M/d/yyyy

Relationship *
Please Select

Figure 9: Contact Fields for Adding a New User

2. Beneath the contact information, select which kind of access you want your proxy to have. You can select from **Allow Complete Access** or **Allow Select Access**.
 - If you select **Allow Complete Access**, all areas are checked.
 - If you select **Allow Select Access**, you can check off specific areas your proxy can access. Areas include **Student Finance, Financial Aid, General, Academics, and Tax Information**.
3. Under **Disclosure Agreement**, check the box to authorize. Then, click **Submit**.

Disclosure Agreement

You are granting access to information from your student account which is protected under federal law. It is the responsibility of the person accessing this account to accept responsibility for protecting the information and maintaining its confidentiality as required by law. You may revoke access at any time by clicking on the Edit Proxy Access icon which appears at the far right of the Active Proxy entry.

I authorize the institution to disclose my information to this party

Cancel
Submit

Figure 10: Disclosure Agreement

4. The system checks for existing users that match the criteria you entered, specifically **last name and email address**.
 - If there is a match, you can choose to **Cancel** the proxy or **Continue**. Continuing with a possible duplicate proxy labels your proxy's status as **Pending** until resolved by the university.
 - If there isn't a match, you can still choose to **Cancel** the proxy or **Continue** as planned.
5. After completing the process, your new proxy should appear under the **Active Proxies** heading.

Active Proxies				
Name	Proxy Access	Relationship	Effective Date	
Ril Cov	Student Finance, Financial Aid, General, Academics, Tax Information	Affiliated	6/19/2020	

Figure 11: Listing of Active Proxies

AFTER ADDING A PROXY

Immediately after you add a proxy to your account, both **you and the proxy** receive an email regarding their new proxy access. In this email you will see:

- Your proxy's username to sign into the MarywoodYou Portal (usually their first initial, full last name)
- A link to the Marywood homepage

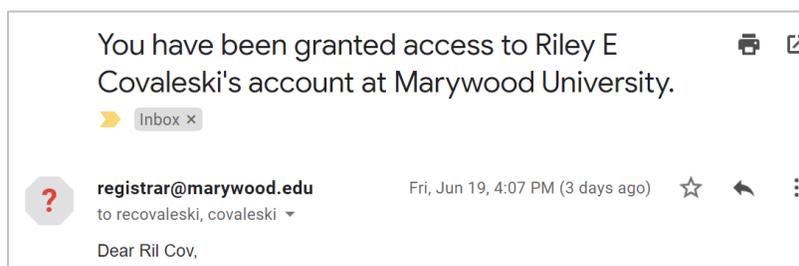


Figure 12: Email with Proxy Username

The proxy you added will also receive **an email with their temporary password.**

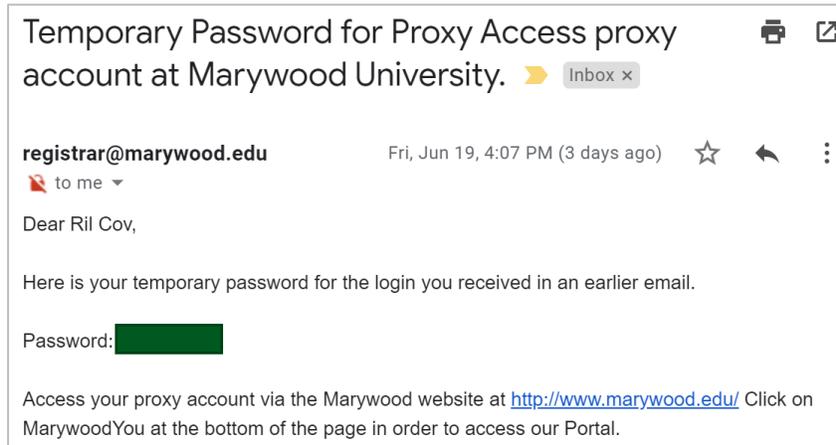


Figure 13: Email with Temporary Password

This password is only valid for the proxy’s first login, after which they will be prompted to create a new password. For more information on this process, see [From the Proxy Side](#).

EDITING PROXY ACCESS

If you ever want to edit or remove access for any of your proxies, simply return to the **View/Add Proxy Access** page. Follow the instructions in the [Accessing the View/Add Proxy Access Page](#) section to get there. Once you’ve reached this page, you can edit or remove access.

1. Under the **Active Proxies** header, find the proxy you want to edit or remove.
2. Click the blue pencil icon  to the right of your desired proxy. This opens the editing window.

Active Proxies				
Name	Proxy Access	Relationship	Effective Date	
 Ril Cov	Student Finance, Financial Aid, General, Academics, Tax Information	Affiliated	6/19/2020	

Figure 14: List of Active Proxies with Edit Icon

3. The editing window shows the proxy’s **name, email address, relationship to you, and their current access.**

Name Ril Cov	
Email Address	Relationship
recovalleski@gmail.com	Affiliated
Access	
<input checked="" type="radio"/>	Allow Complete Access
<input type="radio"/>	Allow Select Access
<input type="radio"/>	Remove All Access

Figure 15: Editing Window for Proxy Including Access

4. To change access, select the radio button next to **Allow Complete Access**, **Allow Select Access**, or **Remove All Access**.
 - If you select **Allow Select Access**, check the boxes next to sections of your student account that you would like the proxy to have access to.

<input checked="" type="checkbox"/> Student Finance i	<input checked="" type="checkbox"/> Financial Aid i
<input checked="" type="checkbox"/> Account Activity	<input checked="" type="checkbox"/> Offer Letter
<input checked="" type="checkbox"/> Account Summary	<input checked="" type="checkbox"/> Financial Aid Home
	<input checked="" type="checkbox"/> Correspondence Option
	<input checked="" type="checkbox"/> Request a New Loan
	<input checked="" type="checkbox"/> My Awards
	<input checked="" type="checkbox"/> FA Outside Awards
	<input checked="" type="checkbox"/> FA Required Documents
	<input checked="" type="checkbox"/> Satisfactory Academic Progress
	<input checked="" type="checkbox"/> College Financing Plan

Figure 16: Checkbox Options for Selective Access

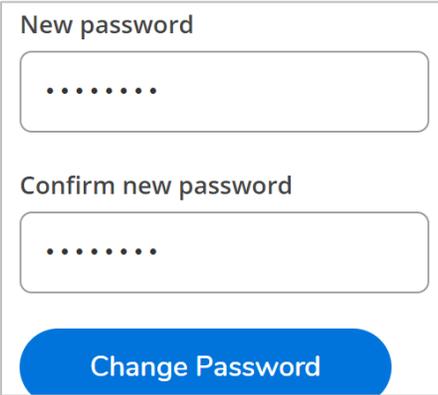
5. Click the blue **Save** button to solidify your choices.
 - If you removed access for the proxy, they will no longer appear in your **Active Proxies** list.
 - If you edited access for the proxy, your changes will reflect in the “Proxy Access” column of the **Active Proxies** list.
6. Repeat the steps above for every proxy for whom you wish to edit or remove access.

FROM THE PROXY SIDE

SIGNING IN & CHANGING YOUR PASSWORD

If you are a proxy to someone else's account, you will receive two emails: one with your username, and one with your temporary password. In order to view the student account you were granted access to, start by signing into the MarywoodYou Portal and changing your temporary password.

1. Navigate to the Marywood University homepage.
2. Click **MarywoodYou** at the bottom of the page.
3. Enter the username you received in the email granting you proxy access.
 - This is usually the first letter of your first name and your entire last name.
 - If you forgot your username, click **Forgot your username?**
4. Enter the temporary password from your email. You will then be prompted to enter a new password.



The image shows a form for changing a password. It has two text input fields. The first is labeled 'New password' and contains seven dots. The second is labeled 'Confirm new password' and also contains seven dots. Below these fields is a blue button with the text 'Change Password'.

Figure 17: New Password Fields

5. Click **Change Password** to complete the password process.
 - If you are within the password requirements, you will see a green confirmation message. Otherwise, you will see a red error message with instructions on how to fit the password criteria.

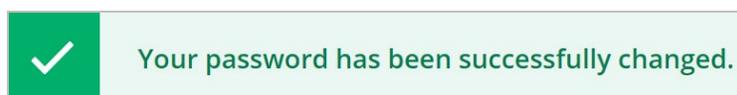


Figure 18: Green Confirmation Message

6. Directly beneath the green confirmation message, click **Please sign in using your new password to continue.** This brings you back to the login page.

7. Enter your username and new password. Then, click **Sign In**.
 - If you forget your password, click **Forgot your password?**

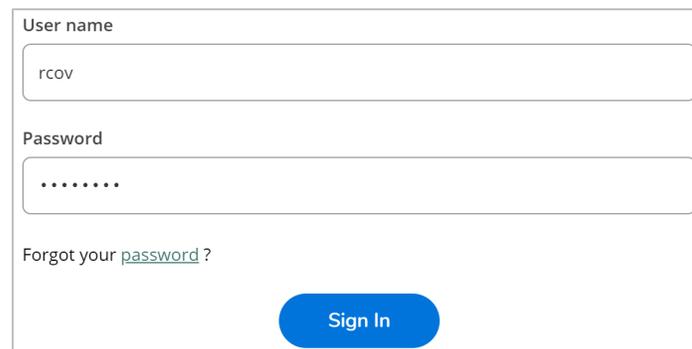

 A screenshot of a sign-in form. It features two input fields: 'User name' with the text 'rcov' and 'Password' with masked characters '.....'. Below the password field is a link that says 'Forgot your [password](#)?'. At the bottom center is a blue rounded button labeled 'Sign In'.

Figure 19: Sign In Fields

NAVIGATING WITH PROXY ACCESS

As soon as you sign in, you have the option to view Student Self-Service as yourself (designated by a blue “You” flag) or the student who granted you access (displayed with a student ID picture). Use the student’s name to access their account.

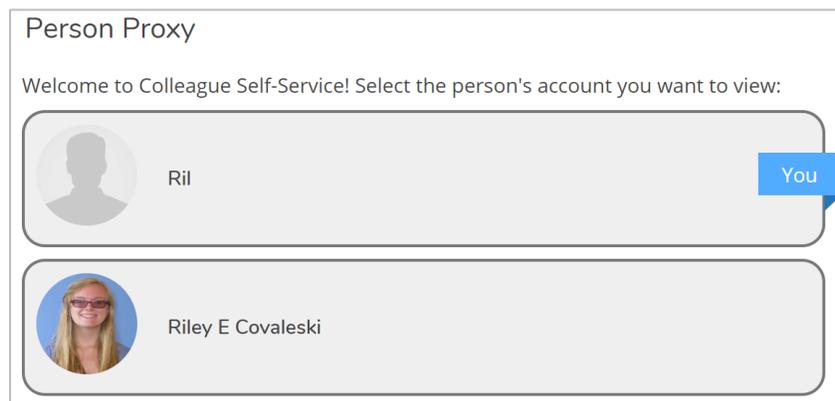

 A screenshot of the 'Person Proxy' selection screen. The title is 'Person Proxy' and the text below reads 'Welcome to Colleague Self-Service! Select the person's account you want to view:'. There are two options: the first is 'Ril' with a grey silhouette icon and a blue 'You' flag; the second is 'Riley E Covaleski' with a circular profile picture of a woman.

Figure 20: Person Proxy Options

1. Click the student’s name to enter their account. Then, click **Continue**.
2. Depending on what they granted you access to view, you will see a series of links. These can include **Student Finance**, **Financial Aid**, **Tax Information**, and/or **Grades**. Click on one to view that area.
3. Whenever you click on an area, look for the breadcrumb trail to navigate to other pages in that area.


 A screenshot of a breadcrumb trail. It consists of three blue links separated by dots: [Financial Information](#) • [Student Finance](#) • [Account Summary](#).

Figure 21: Breadcrumb Trail for Financial Information

4. You can also use the hamburger menu in the top left to see the different areas of Student Self-Service. Click on any heading to expand it.

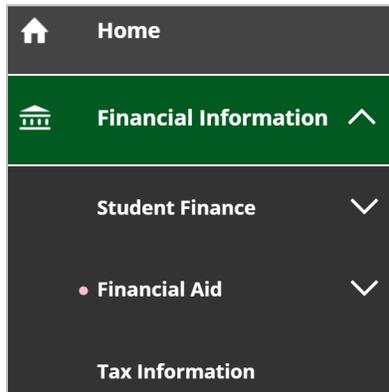


Figure 22: Expanded Financial Information Menu

5. If you want to switch accounts (such as from a student to your own account), click the “Change User” button in the green bar at the top of any page.
 - You will then see the same user selection screen as you saw upon login.



Figure 23: Change User Option

6. Click **Sign Out** in the top right of any page to sign out at any time.



Figure 24: Menu with Sign Out Option