

Proxy Management for Students

Students can use Proxy Management to provide consent for University officials to discuss all of their education records with another person of choice, a proxy. Students can also use Proxy Management to grant parents, spouses, businesses, or others view-only access to select pages of their student records.

See link below for more information.

Create a New Proxy

Students can create a new proxy from Self-Service by following these steps:

- Click on the **Proxy Management** tab.
- Click on the **Add New** link in the upper right.
- Enter the Proxy information, including name, personal email address, and select a Relationship from the drop-down list.

Profile *(Required)*

First Name

Last Name

Personal E-Mail (30 character max)

Verify E-Mail

Relationship ⓘ

- Be sure to enter a **Passphrase**, which can be a code, word, or group of words that you will share with your proxy. Make sure to share your Passphrase that corresponds with each Proxy you set up. The passphrase will be used by your proxy to verify their identity with university officials over the phone.

- Under the **Authorizations** section. note that the first item in the list (University officials may discuss all education records ...) is different from the others. This check box allows OSUIT to discuss your education record with any proxy you set up. The check boxes below only allow view-only access for your proxy. Click the following link to learn more about [authorizing your proxy to discuss student records with university officials](#).
- Check any of the view-only boxes next to the items you wish to authorize for each proxy. Again, these authorizations provide view-only access to specific pages within Self-Service.
- You do not have to give the same authorization access to all of your proxy individuals. You may pick and choose who you want and what you want them to see. If you want a specific proxy to be able to speak to OSUIT about your education record, you must check the “University officials may discuss...” box for that individual proxy.
- You may change your proxy or their access at any time. See Edit proxy information below.

Select All
 Copy Authorizations ⓘ

Select a Person ▼

- University officials may discuss all education records with Proxy
- Award Offer
- College Financing Plan
- Financial Aid Award History
- Financial Aid Dashboard
- Financial Aid Notifications
- Financial Aid Resources
- Financial Aid Satisfactory Requirements
- Financial Aid Status
- Student Grades
- Student Holds
- Student Profile

Cancel
Submit

- Click the **Submit** button at the bottom of the page to save your changes. You will be automatically returned to the main Proxy Management page and see a message indicating the proxy has been successfully created.
- Your proxy will receive an email message with information on how to activate their Proxy account. Until your proxy has followed the instructions in the email message and activated

their account, they will display as inactive and you may see notices indicating their password is disabled or their email was not verified.

Edit proxy information or authorizations

- From **Proxy Management**, click the edit/pencil icon just below the proxy's name.
 - In addition to updating the proxy relationship type, access dates, passphrase and authorizations, you can also use the links provided to perform the following actions:
 - **Reset the proxy's password** (sends your proxy an email with instructions to reset their password)
 - **E-mail the proxy's passphrase** (sends your proxy an email containing the passphrase you've created; they will be required to provide the passphrase to verify their identity over the phone with university officials)
 - **E-mail authorizations** (sends your proxy the list of items you've authorized for them)
 - After making desired updates, click the **Submit** button at the bottom of the page.
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Change my proxy's Passphrase

The passphrase is something you create for your proxy. They use their passphrase to verify their identity over the phone with university officials.

- From **Proxy Management**, click the edit/pencil icon just below the proxy's name.
 - Update the **Passphrase** in the field provided, then click **Submit** at the bottom of the page to save your changes.
 - Finally, click the **Email Passphrase** link.
 - It is important for you to email the Passphrase to your proxy, as they can't view it online.
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Reset my proxy's password

If your proxy is having trouble logging into Proxy Access due to an unknown or expired password, you can help your proxy by using the Reset Password link where you edit proxy information. By following the steps below, an email will automatically be sent to your proxy with instructions on how to create a new proxy password.

- From **Proxy Management**, click the edit/pencil icon just below the proxy's name.
 - Click on the **Reset Password** link.
 - This action sends your proxy an email with instructions on how to reset their proxy password.
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How can I grant access for my parent/proxy to view my billing information?

Billing information is only available via the Touch Net Student Account Suite, and students can create Authorized User accounts within the Touch Net system to grant parents and others with access to view billing information and submit payments. Click [here](#) for information on creating Authorized Users. Please note that Proxy Access and Authorized User accounts are not connected in any way.

Authorize my parent/proxy to discuss my education records with University officials.

While the majority of the options on the proxy Authorizations list allow you to grant a parent/proxy view-only access to specific Self-Service pages, checking the first option (University officials may discuss all education records with proxy) authorizes your proxy to discuss any student educational records with University officials. It does NOT permit parents to request official documents, make changes to records, or otherwise conduct educational business on the student's behalf. [View more details here.](#)

Delete an existing proxy

To permanently delete a proxy relationship, click the delete/trash icon below the proxy's name from the **Proxy Management** page. You will be prompted to confirm you want to delete the selected proxy. Click **Delete** to proceed with the deletion, or Cancel to retain the proxy.
