

## Person Proxy

*Person Proxy* allows you to authorize a person to view/modify your school financial and financial aid records. You can designate one or more persons as a proxy, and grant each proxy permission to view and act on your information. For example, a proxy may be allowed to view and make a payment on your account, or submit information required from the financial aid office.

When you create a proxy, they will receive an email telling them they have access to your account at Carl Sandburg College (you'll receive a copy, too). The email will also contain their login credentials and a Self-Service web link to your account.

This presentation will guide you through the process of adding a proxy.

Login to mySandburg, click Campus Applications, then click Student Self-Service

Campus Applications	My Bookmarks
<p>CAMPUS LINKS</p> <hr/> <p><a href="#">Room Scheduling</a></p> <p><a href="#">Bookstore</a></p> <p><a href="#">Help Desk</a></p> <p><a href="#">Flashpoint</a></p> <p><a href="#">Shots Fired</a></p> <p><a href="#">Title IX</a></p> <p><a href="#">Voter Registration</a></p> <p><a href="#">Dell Premier</a></p> <p><a href="#">Funding Request</a></p> <p><a href="#">Microsoft Office Download</a></p> <p><a href="#">Student Planner</a></p> <p><a href="#">Library</a></p>	
<p>MY LINKS</p> <hr/> <p>There are no links to display yet.</p>	
<p>Manage Bookmarks ▼</p>	

Campus Applications	My Bookmarks
<p><a href="#">Student Self-Service</a></p>	
<p><a href="#">Colleague UI 5.7</a></p>	
<p><a href="#">Student Planner</a></p>	

Sandburg Student Application

https://selfserve.sandburg.edu:8173/student?hideProxyDialog=false

Carl Sandburg College

mbrackett Sign out Help

Hello, Welcome to Colleague Self-Service!  
Choose a category to get started.

- Student Finance**  
Here you can view your latest statement and make a payment online.
- Financial Aid**  
Here you can access financial aid data, forms, e...
- Tax Information**  
Here you can change your consent for e-delivery of tax information.
- Employee**  
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.
- Student Planning**  
Here you can search for courses, plan your terms, and schedule & register your course sections.
- Grades**  
Here you can view your grades by term.
- Graduation Overview**  
Here you can view and submit a graduation application.
- Enrollment Verifications**  
Here you can view and request an enrollment verification.
- Transcript Requests**  
Here you can view and request a transcript.
- Academic Attendance**  
Here you can view your attendances by term.
- Student Finance Admin**  
Here you can view the Student Finance information as a student would so you can help the student with any questions.
- Financial Aid Counseling**  
Here you can view the Financial Aid Hub information as a student would so you can help the student answer any questions.

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Click on your name then click on View/Add Proxy Access

## View/Add Proxy Access

### Active Proxies



You do not have any designated proxies. Add one now to allow another self-service user to view or edit your account.

### Add a Proxy

Select a Proxy

Please Select



Since you have not yet assigned a proxy, you'll receive this message.

https://selfserve.sandburg.edu:8173/Student/PersonProxy

Person Proxy - Sandburg St...

File Edit View Favorites Tools Help

Carl Sandburg College

mbrackett Sign out Help

User Options View/Add Proxy Access

## View/Add Proxy Access

### Active Proxies

You do not have any designated proxies. Add one now to allow another self-service user to view or edit your account.

### Add a Proxy

Select a Proxy

- Please Select
- Elizabeth S. Brackett
- Andrew F. Brackett
- Paula S. Brackett
- Add Another User

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The drop down list in the **Select a Proxy** section of the form will show all persons in the CSC database that are *eligible* to be your proxy. Only persons with an email address & an approved relationship to you are listed.

Choose one or if you want someone not on the list, click on Add Another User.



Access

- Allow Complete Access
- Allow Select Access

**Student Finance** ⓘ

- Account Activity
- Account Summary
- Make a Payment

**General** ⓘ

- Notifications

**Tax Information** ⓘ

- Tax Information

**Financial Aid** ⓘ

- Award Letter
- Financial Aid Home
- Correspondence Option
- My Awards
- Required Documents
- Satisfactory Academic Progress
- Federal Shopping Sheet

**Academics** ⓘ

- Grades

If you select someone from the drop-down list, specify what your proxy is allowed to see.

## Disclosure Agreement

The Family Educational Rights and Privacy Act (FERPA) secures the privacy of the educational record of an individual. The college may release what may be considered "directory information" without the consent of the student. By authorizing individuals to view this portal, your "proxy" will be able to view the following:

\*Name \* Address \* Student ID number \* Classes enrolled \* Account Balance \* Financial Aid information

By designating a proxy, you waive any rights under FERPA regarding these areas but maintain all other rights under the FERPA guidelines.

I authorize the institution to disclose my information to this party

Then agree to the Disclosure Agreement and click Save.

That's it!

Your proxy will receive an email telling them they have access to your account at Carl Sandburg College (you'll receive a copy, too). The email will also contain a web link to the Self-Service program and their login credentials.



What if the person you want as your proxy is not in the drop-down list?

No problem!

You can add that person to the CSC database.

https://selfserve.sandburg.edu:8173/Student/PersonProxy

Person Proxy - Sandburg St... x

File Edit View Favorites Tools Help

CARL SANDBURG COLLEGE

User Options View/Add Proxy Access

## View/Add Proxy Access

### Active Proxies

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### Add a Proxy

Select a Proxy

- Please Select
- Elizabeth S. Brackett
- Andrew F. Brackett
- Paula S. Brackett
- Add Another User

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Click on Add Another User in the Select a Proxy drop down menu.

## Add a Proxy

Select a Proxy

Add Another User

First Name \*

First Name

Last Name \*

Last Name

Email Address \*

Email Address

Confirm Email Address \*

Email Address

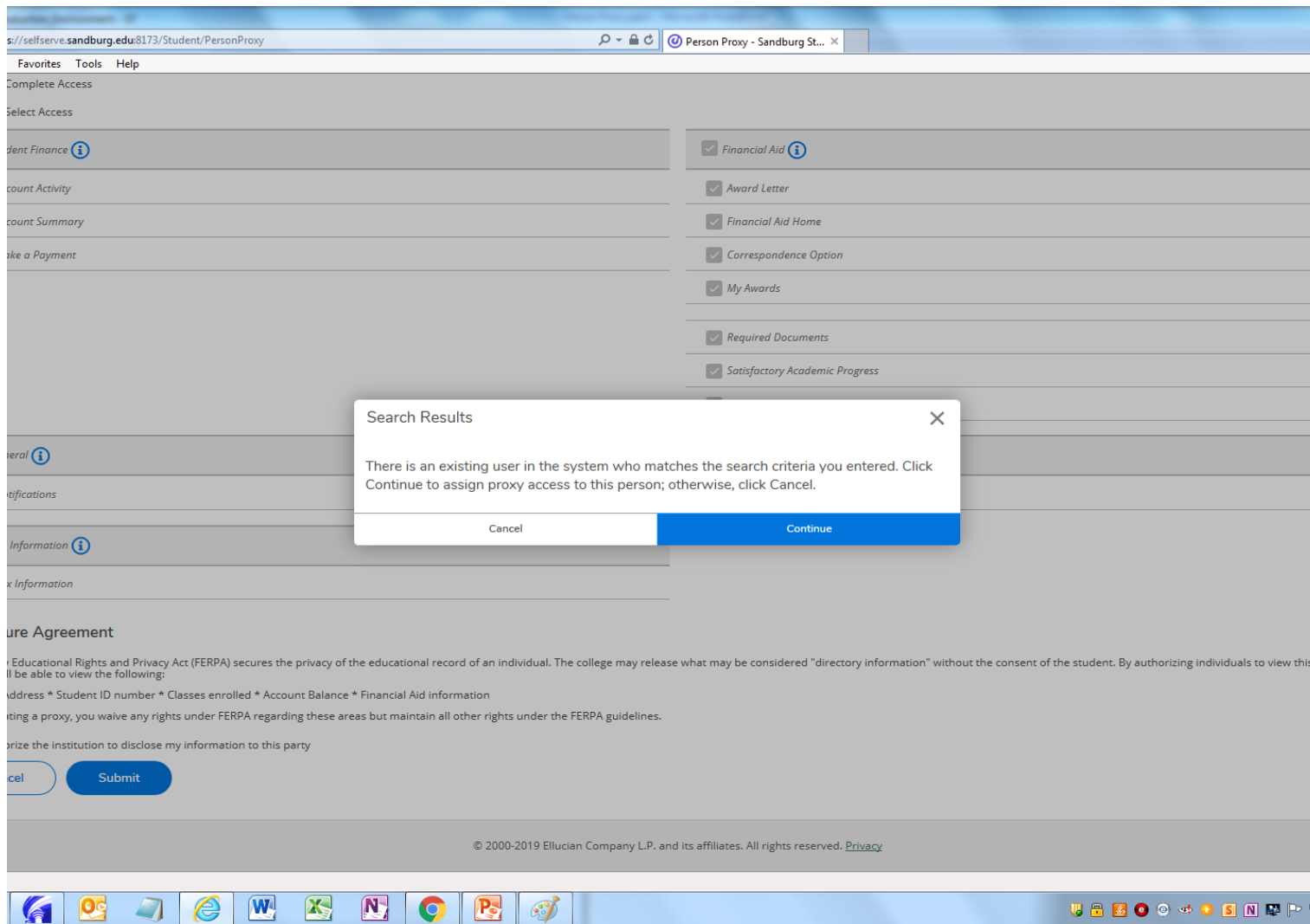
Birth Date \*

M/d/yyyy

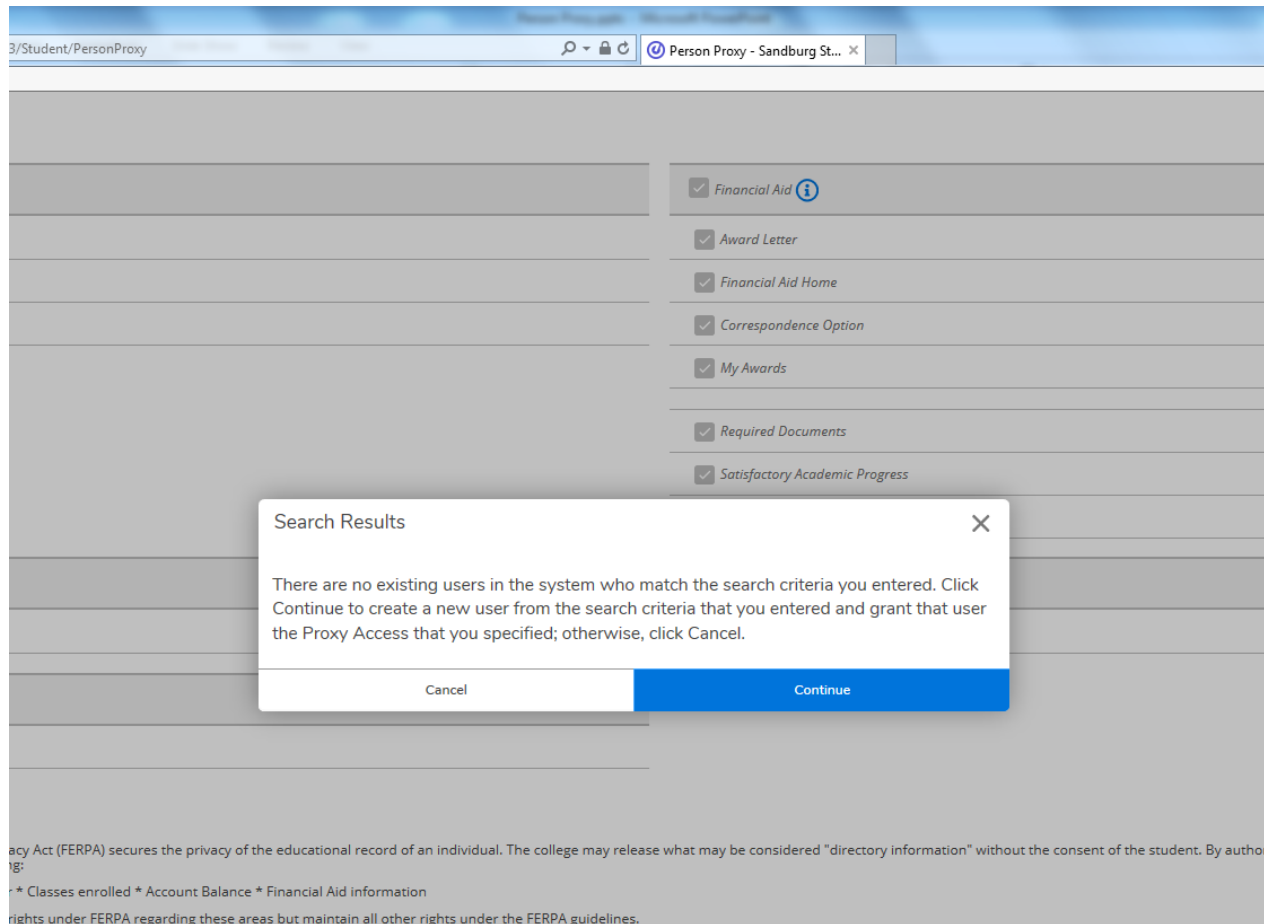
Relationship \*

Please Select

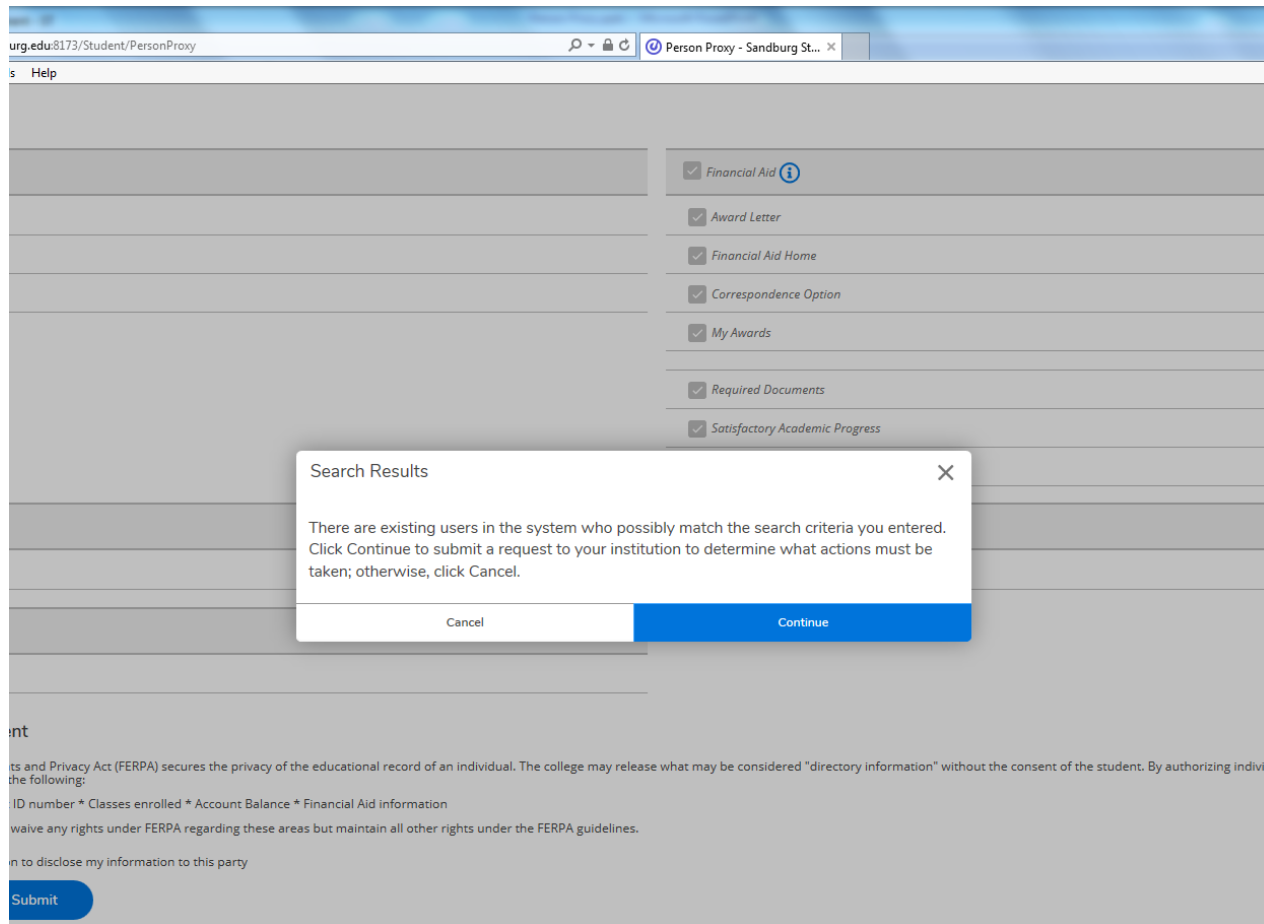
Fill in the required information about your proxy. Set the access you want, click the Disclosure Agreement, and then click Save.



You will receive this message if the CSC software has located your proxy in our database. Click Continue to add your proxy.



You will receive this message if the CSC software determines this person is not already in our database. Click Continue to add your proxy.



You will receive this message if the CSC software has found more than one person who fits your search criteria. If you click Continue, a CSC staff member will review the request and determine which person will be designated your proxy. Please allow 24 hours for the review.

## What does your proxy do now?

You have created your proxy and they have been notified by email. They have their login ID & password and the web link to Self-Service and are ready to access your account. The next slides describe how the proxy will view/modify your account.

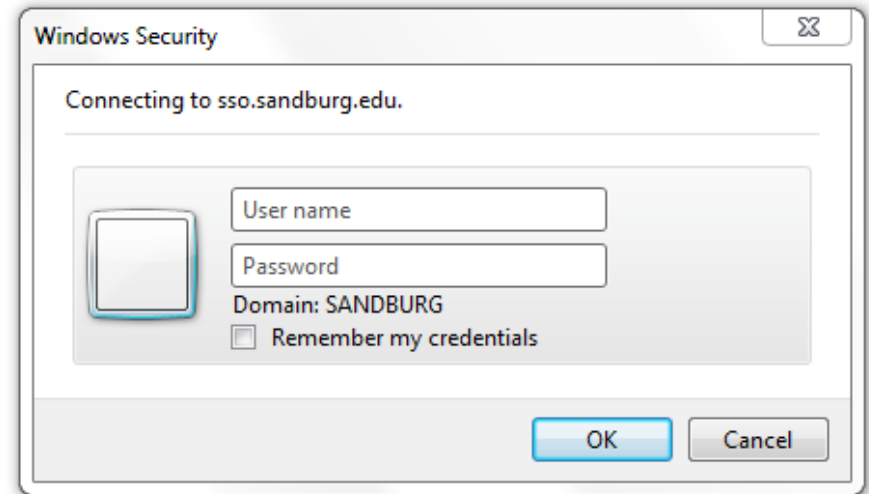
# Carl Sandburg College SSO

Sign in with your organizational account

Sign in

Please enter your full email address as your Login Name.  
For Students it should be **username@student.sandburg.edu**  
For Staff/Faculty it should be **username@sandburg.edu**  
If you are still having problems accessing the portal you may need to clear your browsers cache, for instructions click [here](#).





Favorites Tools Help

Andrew Sign out Help 0

# CARL SANDBURG COLLEGE

## Andrew. Welcome to Colleague Self-Service!

category to get started.

### Student Finance

Here you can view your la

#### Person Proxy

Welcome to Colleague Self-Service! Select a user:

Andrew You

Michael D. Brackett

Cancel Continue

Sandbur

When your proxy logs in to Self-Service they will have the choice of who to sign in as – themselves or you. If they are acting as *your* proxy and want to see *your* info, they click *your* name. If they are a student and want to see *their* info, they click *their* name.

CARL  
SANDBURG  
COLLEGE

Michael Sign out ? Hel

Elizabeth acting on behalf of Michael [Change User](#)

Hello, Welcome to Colleague Self-Service!  
Choose a category to get started.

**Student Finance**  
Here you can view your latest statement and make a payment online.

**Financial Aid**  
Here you can access financial aid data, forms, etc.

**Tax Information**  
Here you can change your consent for e-delivery of tax information.

**Grades**  
Here you can view your grades by term.

Self-Service adds a banner at the top to remind them they are acting as a proxy to the student.

## Person Proxy

If you or your proxy have any questions, please call Candace Fones at (309) 341-5289.