Self-service Handbook: How to Add a Proxy



Head to https://www.hlg.edu/

Scroll to the bottom and click on the Self-Service link.



The Self-Service link will take you to the sign in screen.

I T IHLGU		
	Sign In	
	Username	
	Sign In	

Sign in with the appropriate credentials.

Once you've signed in, you will be taken to Self-Service's home page. Click the person icon.

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ń	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.	3	Financial Aid Here you can access financial aid data, forms, etc.			
۲	T nation thansat very of tax information.	*	Banking Information Here you can view and update your banking information	on.		
	Employee Final on the second sec		Student Planning Here you can search for courses, plan your terms, and	schedule & register your cours	se sections.	
	Con g Here you the d search the course catalog.		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 verificat	ion.		
	Transcript Requests Here you can view and request a transcript.	i	Academic Attendance Here you can view your attendances by term.			
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After you click the person icon a dropdown menu will appear.

Click View/Add Proxy Access.

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ń	Home	Hello, Welcome to Colleague Self-Service! Choose a category to get started.					
ŧ	Financial Information 🗸						
OB	Employment 🗸 🗸	Student Finance Here you can view your latest statement and make a payment online. B Here you can	an access financial aid data, forms, etc.				
۲	Academics 🗸 🗸	Tax Information Here you can change your consent for e-delivery of tax information.	Information an view and update your banking information.				
1	Vendor Information 🛛 🗸	Employee Student	Planning				
۲	User Options	Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.	an search for courses, plan your terms, and schedule	for courses, plan your terms, and schedule & register your course sections.			
	User Profile	Course Catalog Here you can view and search the course catalog. Grades Here you can	an view your grades by term.				
	Emergency Information						
	View/Add Proxy Access	duation Overview Enrollme Here you ca	ent Verifications an view and request an enrollment verification.				
		here you ca	ic Attendance an view your attendances by term.				
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Creating a new Proxy:

To add a new proxy, click the **Select a Proxy** tab.

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•	User Options + View/Add Proxy Access			
÷.	View/Add Proxy Access			
©)\$	Below you can grant, edit, or remove access to your records for another party (parent, spouse, employer, etc.).			
۲	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			
۲	Choose an existing proxy user to edit or add a new user using the dropdown below			
	Select a Proxy			
	Please Select 🗸			
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A dropdown list will appear. Click Add Another User.

	Add	a Proxy	
3	í	Choose an existing proxy user to edit or add a new user using the dropdown belo	ow.
	Select a	Ргоху	
	Pleas	e Select 🗸	
	Pleas	e Select	
			© 2000

Next, enter the appropriate credentials.

•	Select a Proxy		
Ē	Add Another User		
	First Name *	Middle Name	Last Name *
<u>)</u> \$	First Name	Middle Name	Last Name
	Former Last Name	Email Address *	Confirm Email Address *
	Former Last Name	Email Address	Email Address
	Phone	Phone Type	Birth Date *
۲	Phone	Please Select V	M/d/yyyy
	SSN	Confirm SSN	Relationship *
	SSN	SSN	Please Select 👻

After that you will get to choose what the proxy has access to. There are two options here. The first option is **Allow Complete Access**. This will give the proxy access to everything the student has access to in Self-Service

Access * Allow Complete Access Allow Select Access	
Student Finance	🐷 Financial Aid 🚺
Account Activity	🥪 Offer Letter
Account Summary	✓ Financial Aid Home
🥪 Make a Payment	Correspondence Option
	✓ Request a New Loan
	V My Awards
	V FA Outside Awards
	✓ FA Required Documents
	Satisfactory Academic Progress
	College Financing Plan
Ceneral 🚺	✓ Academics ①
Notifications	Crades
Tax Information ()	
✓ Tax Information	

The second option is **Allow Select Access**. This will give the proxy select access to the students Self-Service. A blue checkmark means the proxy will have access to that part of the students Self-Service.

	Access *	
<u>ی</u>	Allow Select Access Student Finance	🕑 Financial Aid 🕕
	Account Activity	✓ Offer Letter
5	Account Summary	🛃 Financial Ald Home
	Make a Payment	Correspondence Option
-		🥏 Request a New Loan
		My Awards
		FA Outside Awards
		FA Required Documents
		Satisfactory Academic Progress
		Z College Financing Plan
	🥑 General 🚺	Academics (1)
	Votifications	✓ Grades
	Z Tax Information ()	
	Z Tax Information	

Once you have determined what access to give the proxy, you will have to authorize a **Disclosure Agreement** and click **Submit**.

Disclosure Agreement

You are about to add a user who will have access to information protected by FERPA. Granting this access indicates you are waiving your FERPA privacy rights for the items you select to anyone with access to the account you indicate.



After you click Submit you will be able to see your newly created proxy under **Active Proxies**.

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	View/Add Proxy Access								
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() \$	(i) Below you can gran	nt, edit, or remove access to your records fo	or another party (p	arent, spouse, employer	', etc.).				
٢	Active Proxies								
	Name	Proxy Access	Relationship		Effective Date				
5	Bob L. Ross	Student Finance, Financial Aid, General, Academics, Tax Information	Guardian		6/8/2020	Ø			
()	Add a Proxy								
	(i) Choose an existing	Choose an existing proxy user to edit or add a new user using the dropdown below.							

Editing and Removing Active Proxies:

To edit or remove an active proxy, you will have to click the **pencil** icon on the proxy you want to edit or remove.

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	View/Add Proxy Access									
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٢	Active Proxies									
	Name	Proxy Access	Relationship		Effective Date					
\$	Bob L. Ross	Student Finance, Financial Aid, General, Academics, Tax Information	Guardian		6/8/2020	Ø				
٩	Add a Proxy									
	(i) Choose an existing	(i) Choose an existing proxy user to edit or add a new user using the dropdown below.								

A popup menu will appear. Here you can select what access your active proxy will have. You can also remove all access from a proxy here. Once you have made your changes click **Save**.

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User Options · View/Add Proxy Access						
View/Add Proxy Access	Edit Proxy Details					
	Name Bob L. Ross		Í.			
Below you can grant, edit, or remove access to	Email Address bross@gmail.com	Relationship Guardian				
Active Proxies	Access					
Name Proxy Acces	Allow Select Access				Effective Date	
Bob L. Ross Student Fina Information	Remove All Access				6/8/2020	Ø
Add a Proxy	Student Finance 🚺		Financial Aid 🚺			
	Account Activity		Offer Letter			
Choose an existing proxy user to edit or add a	Account Summary		Financial Aid Home			
Select a Proxy	🔽 Make a Payment		Correspondence Option			
Please Select			Request a New Loan	1		
	Cancel		Save 🗸			
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