

McLennan Community College Proxy Access

What is Proxy?

Proxy, formerly known as **FERPA Consent**, allows students to release academic/financial information to a third party such as a relative, spouse, friend, non-McLennan counselor, or others. A student who chooses to give another person Proxy is giving that person Student Planning log-in access to view the student's education records. **Any Individual that previously had "FERPA Consent" now has Proxy access.**

Proxy access can be assigned and removed at any time through Student Planning. Students own their educational records and are not required by McLennan Community College to assign any individuals Proxy access.

The only individuals that can access student educational records without Proxy Access are school officials with legitimate educational interest. School officials include McLennan staff/faculty and employees at all partner agencies.

What Access is Provided with Proxy?

When Assigned Proxy Access, individuals receive an email with directions for logging into Student Planning. This allows individuals with Proxy to access the student's educational records at any time that they have Proxy access. Individuals can access the student's information below:

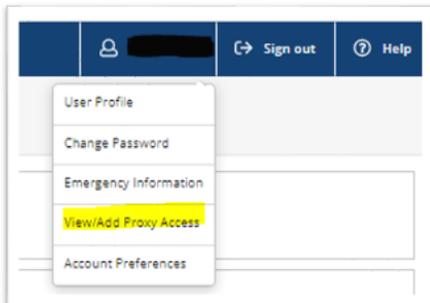
- ▶ Student Finance
 - ▶ Account Activity
 - ▶ Account Summary
 - ▶ Make a Payment
- ▶ General
 - ▶ Notifications
- ▶ Tax Information
- ▶ Academics
 - ▶ Grades
- ▶ Financial Aid
 - ▶ Offer Letter
 - ▶ Financial Aid Home Screen
 - ▶ My Awards
 - ▶ FA Outside Awards
 - ▶ FA Required Documents
 - ▶ Satisfactory Academic Progress

How to Assign Proxy Access

Proxy access can only be granted and/or removed through student planning. To add proxy you must first log into student planning. Once you are logged in you may utilize the two options below to add access.

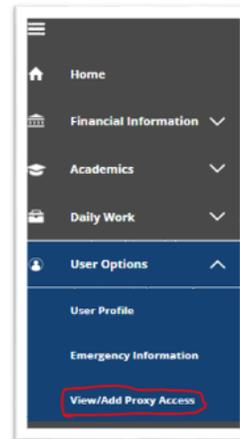
Option One

- ▶ Click on your username in the top right and corner and select “View/Add Proxy Access”.

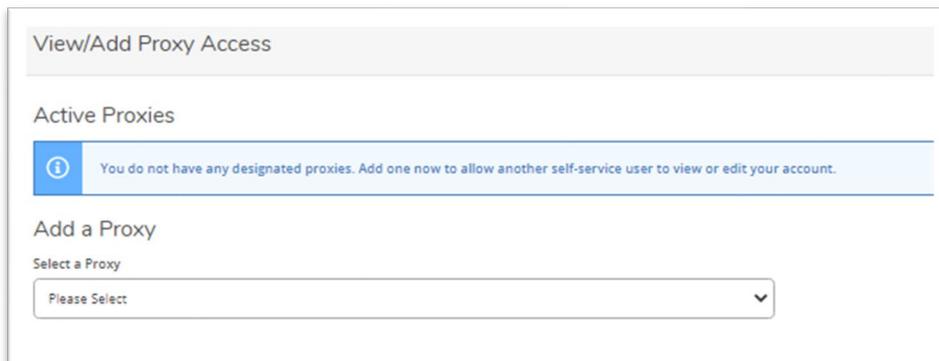


Option Two

- ▶ Under the “User Options” menu in the top left hand corner select “View/Add Proxy Access”.



- ▶ Once you have selected “View/Add Proxy Access” you will be directed to the “Add a Proxy” Screen. If you have never assigned FERPA Consent or Proxy Access you will not have any “Active Proxies” until Proxy is granted.

A screenshot of the 'View/Add Proxy Access' screen. The title is 'View/Add Proxy Access'. Below it is a section for 'Active Proxies' with a message: 'You do not have any designated proxies. Add one now to allow another self-service user to view or edit your account.' Below that is an 'Add a Proxy' section with a dropdown menu labeled 'Select a Proxy' and the text 'Please Select'.

- ▶ To Assign Proxy you will need to select “Add another User” on the “Select a Proxy” drop down menu. Once selected your screen will allow you to enter your Proxy’s personal information. Please note: you will want to select a current email address. This is where your Proxy will receive Student Planning log-in instructions.

Select a Proxy

A close-up screenshot of the 'Select a Proxy' dropdown menu. The text 'Please Select' is visible inside the dropdown box, and a downward arrow is on the right side.

Prefix <input type="text" value="Please Select"/>	First Name * <input type="text" value="First Name"/>	Middle Name <input type="text" value="Middle Name"/>
Last Name * <input type="text" value="Last Name"/>	Suffix <input type="text" value="Please Select"/>	Former First Name <input type="text" value="Former First Name"/>
Former Middle Name <input type="text" value="Former Middle Name"/>	Former Last Name <input type="text" value="Former Last Name"/>	Email Address * <input type="text" value="Email Address"/>
Confirm Email Address * <input type="text" value="Email Address"/>	Email Type * <input type="text" value="Please Select"/>	Phone * <input type="text" value="Phone"/>
Phone Extension <input type="text" value="Phone Extension"/>	Phone Type * <input type="text" value="Please Select"/>	Birth Date * <input type="text" value="MM/DD/YYYY"/>
Gender <input type="text" value="Please Select"/>	SSN <input type="text"/>	Confirm SSN <input type="text"/>
Relationship * <input type="text" value="Please Select"/>		

- Once personal information has been entered, you can now assign access. Students have the option to “Allow Complete Access” or “Allow Select Access”. You will need to select what you would like your proxy to have access to if assigning “Select Access”.

Edit Proxy Details

Access

- Allow Complete Access
- Allow Select Access
- Remove All Access

<input checked="" type="checkbox"/> Student Finance ⓘ	<input type="checkbox"/> Financial Aid ⓘ
<input checked="" type="checkbox"/> Account Activity	<input type="checkbox"/> Offer Letter
<input checked="" type="checkbox"/> Account Summary	<input type="checkbox"/> Financial Aid Home
<input checked="" type="checkbox"/> Make a Payment	<input type="checkbox"/> My Awards
	<input checked="" type="checkbox"/> FA Outside Awards
	<input checked="" type="checkbox"/> FA Required Documents
	<input type="checkbox"/> Satisfactory Academic Progress

- Once you have selected access for your proxy user the last step is to sign the “Disclosure Agreement” at the bottom of the “View/Add Proxy Access” Screen. Once you authorize and submit, an email with student planning log-in instructions and proxy information will be automatically generated to your Proxy.

How to Edit or Remove Proxy Access

- ▶ To change or remove Proxy access you will need to select the blue “edit pen” next to your proxy under the “Active Proxies” list.

Proxy Access	Relationship	Effective Date	
Student Finance, Financial Aid, General, Academics, Tax Information	Family	9/27/2021	
Student Finance, Financial Aid, Tax Information	Family	6/10/2022	

- ▶ Once you have selected the blue “edit pen” you will be directed to the “Edit Proxy Details” screen.
- ▶ Edit the access and save out. You may:
 - Allow Complete Access
 - Allow Select Access
 - Remove All Access
- ▶ These changes will go into effect immediately.

Edit Proxy Details

Name John Doe

Email Address Relationship
John.Doe@gmail.com Family

Access

- Allow Complete Access
- Allow Select Access
- Remove All Access

- ▶ If access was removed you will no longer see the individual listed under “Active Proxies”.

Proxy Reminders

- ▶ Students own their educational records and are not required by McLennan Community College to assign any individuals Proxy access.
- ▶ Students have the right to remove Proxy access at any time.
- ▶ Individuals with Proxy access will have their own Student Planning log-in information that can be used to view student information.
- ▶ All Proxy questions and concerns can be directed to the Office of Records and Registration.
 - Email: register@mclennan.edu
 - Phone: 254-299-8507
 - In Person: Visit us in the Enrollment Services Center