

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.

When a proxy logs into the Self-Service program, the proxy is considered to be you when retrieving student information. However, when data is submitted or modified by the proxy, the transaction is considered as having been made by the proxy user, and not by you. For example, when a proxy user makes a payment for you, the payer information on the cash receipt indicates that the proxy user made the payment for you.

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

Sign in

Enter your user name and password to sign in.

First, sign on to Self-Service program at <https://selfserve.sandburg.edu:8173/Student/>



Hello, Michael. 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.



Student Planning

Here you can search for courses, plan your terms, and schedule & register your course sections.



Graduation

Here you can apply for graduation.

Look for your name at the top of the Home page. Click on the drop down menu next to your name.

User Options

- [User Profile](#)
- [Change Password](#)
- [Emergency Information](#)
- [View/Add Person Proxy](#)
- [Site Administration](#)



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Click on View/Add Person Proxy in the drop down menu.



MENU

Michael

Sign out

Help

0 Notifications



[Home](#)

Person Proxy

Active Proxies

i 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

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

Home

Person Proxy

Active Proxies

i 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
- Dave Wilcox
- Add Another User

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The drop down menu in the **Select a Proxy** section of the form will list all persons in the CSC database that are eligible to be your proxy. Choose one or if you want someone not on the list, click on Add Another User. Note that only persons with an email address & an [approved relationship](#) to you are listed.

Add a Proxy

Select a Proxy

Elizabeth S. Brackett

Email Address

@gmail.com

Relationship

Child

Access

Allow complete access

Student Finance

Select All

Account Activity

Make a Payment

Financial Aid

Select All

Award Letter

Financial Aid Home

Correspondence Option

My Awards

Required Documents

Satisfactory Academic Progress

Federal Shopping Sheet

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

Cancel

Save

If you pick someone from the list, select what access you want your proxy to have, agree to the Disclosure Agreement, and then 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.



MENU



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[Home](#)

Person Proxy

Active Proxies

i 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
Dave Wilcox
Add Another User



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

Select a Proxy

First Name *

Last Name *

Email Address *

Confirm Email Address *

Birth Date *

Relationship *

Access * Allow complete access

Student Finance	Select All	<input type="checkbox"/>
Account Activity		<input type="checkbox"/>
Make a Payment		<input type="checkbox"/>

Financial Aid	Select All	<input type="checkbox"/>
Award Letter		<input type="checkbox"/>
Financial Aid Home		<input type="checkbox"/>
Correspondence Option		<input type="checkbox"/>
My Awards		<input type="checkbox"/>
Required Documents		<input type="checkbox"/>
Satisfactory Academic Progress		<input type="checkbox"/>
Federal Shopping Sheet		<input type="checkbox"/>

Disclosure Agreement

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I authorize the institution to disclose my information to this party

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

First Name * Amy
Last Name * Brooks
Email Address * mbrackett@sandburg.edu
Confirm Email Address * mbrackett@sandburg.edu
Birth Date * 2/28/1960
Relationship * Sibling
Access * Allow complete access

Student Finance Select All Financial Aid Select All

Account Activity
Make a Payment

Federal Shopping Sheet

Search Results

There is an existing user in the system who matches the search criteria you entered. Click Continue to assign proxy access to this person; otherwise, click Cancel.

Cancel Continue

Disclosure Agreement

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I authorize the institution to disclose my information to this party

Cancel Search

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

Browser window showing a proxy access form for Sandburg.edu. The form includes fields for Birth Date (8/20/1956), Relationship (Sibling), and Access (Allow complete access). There are sections for Student Finance, Financial Aid, Account Activity, and Make a Payment, each with a 'Select All' checkbox. A 'Search Results' dialog box is displayed in the center, stating: "There are no existing users in the system who match the search criteria you entered. Click Continue to create a new user from the search criteria that you entered and grant that user the Proxy Access that you specified; otherwise, click Cancel." The 'Continue' button in the dialog is highlighted with a red arrow. Below the dialog is a 'Disclosure Agreement' section with a checkbox for authorization.

Birth Date * 8/20/1956

Relationship * Sibling

Access * Allow complete access

Student Finance Select All

Financial Aid Select All

Account Activity

Make a Payment

Award Letter

Financial Aid Home

Correspondence Option

Mv Awards

Search Results

There are no existing users in the system who match the search criteria you entered. Click Continue to create a new user from the search criteria that you entered and grant that user the Proxy Access that you specified; otherwise, click Cancel.

Cancel Continue

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

Cancel Search

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

File Edit View Favorites Tools Help

First Name * dave
Last Name * wilcox
Email Address * mpbrac@gmail.com
Confirm Email Address * mpbrac@gmail.com
Birth Date * 01/31/1959
Relationship * Sibling
Access * Allow complete access

Student Finance Select All Financial Aid Select All

Account Activity
Make a Payment

Federal Shopping Sheet

Search Results

There are existing users in the system who possibly match the search criteria you entered. Click Continue to submit a request to your institution to determine what actions must be taken; otherwise, click Cancel.

Cancel Continue

Disclosure Agreement

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*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

Cancel Search

100%

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.

Change Password

Please enter your user name, current password, and new password.

 Login failed: Your password has expired. Please choose a new password.

User name

Current password

New password

Confirm new password

The very first time your proxy logs in to Self-Service they will be prompted to change their temporary password. They should create a new password and log in again.

Andrew. Welcome to Colleague Self-Service!

a 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.

Andrew acting on behalf of Michael

Change User



MENU



CARL
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Michael

Sign out

Help

Notifications

Hello, Michael. 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.

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



MENU



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Hello, Michael. 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.

Self-Service is a very intuitive program. Click on the Student Finance tab to access the financial actions and click on the Financial Aid tab to access the financial aid actions.

Person Proxy

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

The following is a list of approved relationships:

Child

Companion

Grandparent

Guardian

Parent

Spouse

Sibling

Step-parent

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