

FERPA: CONFIRMING AUTHORIZED USER

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REVISION HISTORY

Version	Date	Name	Description
1.0	12/8/15	Bracken Dailey	Final document
1.1	1/7/16	Teri Eckman	Converted to template and PDF for web

INTRODUCTION AND PURPOSE

Students are allowed to give access to an authorized user to interact with the following offices: Financial Aid, Housing, and Student Business Services.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

1. [UCR FERPA Policy](#) gives guidance on when and to whom student information can be released
2. UCR has historically provided students access in self-service to give a third-party authorization to interact with three offices (due to their financial component) on campus – Financial Aid, Housing and Student Business Services. No other office may use the authorization to interact with a third-party.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Financial Aid
2. Housing
3. Student Business Services

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open Banner Training (bannersbx.ucr.edu) to follow along.

FORMS

The forms listed below are covered in this training.

Form	Form Name	Description
GPAPRXY	Proxy Access Management Form	This form is used as a way to confirm authorized users and audit the authorized user's proxy activities of a Banner person.

PROCEDURES

NAVIGATING PROXY ACCESS MANAGEMENT FORM (GPAPRXY)

This form is used as a way to confirm authorized users and audit the authorized user's proxy activities of a Banner person.

STEPS

1. Go to **GPAPRXY**
2. Input the Student ID in the ID block and press **NEXT BLOCK**
3. On this page there are a couple of important pieces of information:
 - a. **Look for multiple records** – students can create multiple authorized user accounts so you may need to page through to find the one you are looking for. The email address is the unique identifier for the authorized user. There can only be one authorized user in the entire system with that email address.
 - b. **Relationship** – for reference and understanding of who you are talking to, the student has provided the relationship between the student and the authorized user.
 - c. **Start Date and Stop Date** – it is important that you determine if today's date is within these dates. **If the current date (today's date) is between these dates then the authorization is currently active.**
 - d. **Passphrase** – this phrase was created by the student and shared with the authorized user. You should request this phrase whenever you are trying to verify identity.
 - e. **Page Authorization List** – this is the list of what the student has granted proxy access to for the authorized user. You need to ensure that your department has a check mark. **If there is no check mark by your department the student has NOT given authorization (even if there is a passphrase).**

Proxy Access Management Form GPAPRXY 8.5 (PPRDXE)

Confidential

ID: A00010002 Bracken Dailey

Proxy Information Record: 4 of 5

Name: Jo, Sally Relationship: Parent or Legal Guardian

Proxy Desc: Mother Start Date: 30-JUL-2015 PIN Disabled: N

Email: bracken.dailey@ucr.edu Stop Date: 01-AUG-2016 PIN Expire Date: 11-AUG-2016

Passphrase: UCR rocks

Page Authorization List Access List Communication Log

Module	Auth Ind	Menu Text	Page URL
Parent Access	<input type="checkbox"/>	View Address	bwgkogad.P_SelectAtypView
Parent Access	<input type="checkbox"/>	View E-Mail Addresses	bwgkogad.P_SelectEmailView
Parent Access	<input type="checkbox"/>	View Ethnicity and Race	bwgkomre.P_ViewEthnicityRace
Parent Access	<input type="checkbox"/>	View Holds	bwskoacc.P_ViewHold
Parent Access	<input checked="" type="checkbox"/>	View Test Scores	bwsktesc.p_view_tests
Parent Access	<input checked="" type="checkbox"/>	View Final Grades	bwskogrd.P_ViewTermGrde
Parent Access	<input type="checkbox"/>	View Graduation Application	bwskgrad.p_view_gradapp
Parent Access	<input type="checkbox"/>	View Billing Account Information	bwskoacc.P_ViewAR
Parent Access	<input type="checkbox"/>	View Billing Account Summary by Term	bwskoacc.P_ViewAcct
Parent Access	<input type="checkbox"/>	View Billing Account Detail for Term	bwskoacc.P_ViewAcctTerm
Parent Access	<input checked="" type="checkbox"/>	Speak with Student Business Services about billing information	zucroprf.p_display_billing
Parent Access	<input checked="" type="checkbox"/>	Speak with Financial Aid Office about financial aid information	zucroprf.p_display_finaid
Parent Access	<input checked="" type="checkbox"/>	Speak with Housing Services Office about housing information	zucroprf.p_display_housing

CHECK YOUR UNDERSTANDING

What can you use to make sure that you are on the correct authorized user record?

- a. Name of the authorized user
- b. Email address of the authorized user

Answer: (b) – Email address of the authorized user. The email address is a unique identifier and therefore is the best data to use to ensure that you are on the correct record.

HOW TO DETERMINE IF ACCESS HAS BEEN GRANTED

This section takes you through the steps of verifying that you are on the correct student record and that you have authorization to speak to the authorized user.

STEPS

1. Check/verify student's name and date of birth on **SPAIDEN**
2. Check that you are on the correct authorized user in the **Proxy Information** block of **GPAPRXY**
3. Check that your department is listed on the **Page Authorization List** tab and the **Auth Ind** box is checked
4. Check that today's date (current date) is within the **Start Date** and **Stop Date**
5. Ask the authorized user for the **Passphrase**

If all conditions are met, you may discuss the student account with the authorized user.

If you receive a warning that the student information is confidential please make sure you check the directory information flags on **GOADPRF**. **If the student's NAME has been restricted, you cannot release ANY information. You cannot acknowledge that the student is/was a student at UCR. You should simply say, "I have no information".**

If the authorized user insists that there is a mistake, you should advise the caller to go back to the person and tell them to contact the institution.

Confidentiality Warning Message Box



Review the [FERPA: View Directory Information](#) training document for more information about how to interpret FERPA Directory Information release indicators.

CHECK YOUR UNDERSTANDING

What form can you go to find directory information release indicators?

- a. GOAPRXY
- b. GOADPRF

Answer: (b) – GOADPRF. Remember to refer to the FERPA: View Directory Information training document for more information on how to interpret the release indicators.

FINAL QUIZ QUESTIONS

1. What can you use to make sure that you are on the correct authorized user record?
 - a. Name of the authorized user
 - b. Email address of the authorized user

Answer: (b) – Email address of the authorized user. The email address is a unique identifier and therefore is the best data to use to ensure that you are on the correct record.

2. If the check mark is missing from the **Auth Ind** checkbox for your department, but is checked for another department, you can still release information.
 - a. True
 - b. False

Answer: (b) – False. The **Auth Ind** checkbox must be checked for your department in order for you to release information.

3. If the **Passphrase** for the authorized user is “UCR rocks” and the authorized user tells you that it is “UCR rocked” you can release the information.
 - a. True
 - b. False

Answer: (b) – False. The passphrase the authorized user provides to you must match EXACTLY.

4. A confidentiality warning message popped up and you went to **GOADPRF**. The student has restricted only their telephone number. Can you release information about this student to the authorized user?
 - a. Yes
 - b. No

Answer: (b) – Yes. The only confidentiality indicator that prevents you from speaking to the authorized user is if the **Name** of the student is restricted.

5. Today is April 1, 2016. The **Stop Date** for this authorized user indicates March 31, 2016. Can you release information to the authorized user?
 - a. Yes
 - b. No

Answer: (b) – No. You may only release information if today’s date is on or after the **Start Date** and on or before the **Stop Date**.