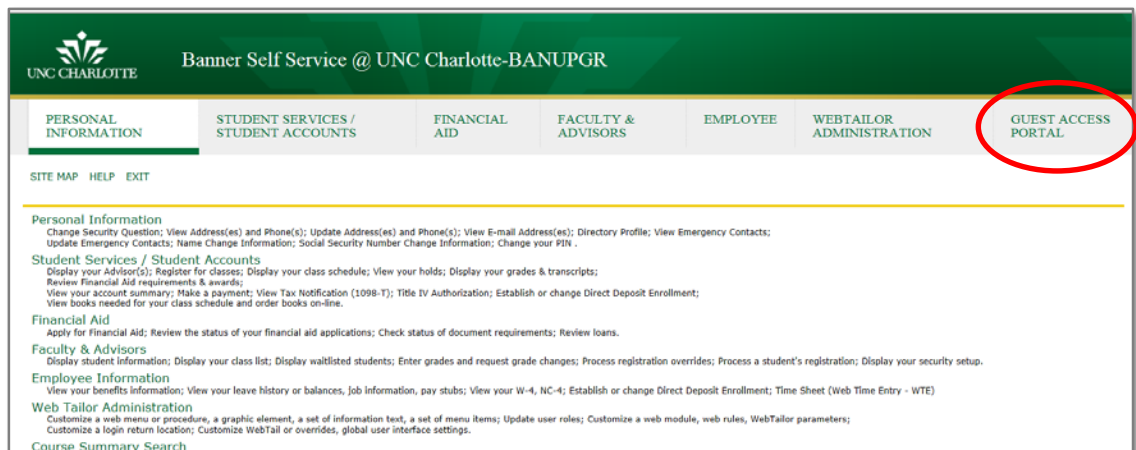


## Welcome to the Guest Access Portal

- The Guest Access Portal allows students to grant a guest, such as a parent or spouse, access to view their education records in Banner Self-Service.
- The Family Educational Rights and Privacy Act (FERPA), a federal law that ensures the privacy of student academic records, specifies that only directory information like the student's name, major field of study, and enrollment status, can be released to other parties without the student's consent. Information like grades, a class schedule or billing statements cannot be provided to anyone without the student's permission.
- In the past, students would sign a consent form to permit parents and other designated parties to view FERPA-protected information. Now, with the implementation of the Guest Access Portal, students can provide this access online without the added delays of completing and submitting paper forms.

## Instructions for Students – Adding a Guest

**STEP 1:** Click on the **Guest Access Portal** tab in Banner Self-Service.



The screenshot shows the Banner Self Service @ UNC Charlotte-BANUPGR interface. The navigation menu includes: PERSONAL INFORMATION, STUDENT SERVICES / STUDENT ACCOUNTS, FINANCIAL AID, FACULTY & ADVISORS, EMPLOYEE, WEBTAILOR ADMINISTRATION, and GUEST ACCESS PORTAL. The GUEST ACCESS PORTAL tab is circled in red. Below the navigation menu, there are links for SITE MAP, HELP, and EXIT. The main content area lists various services such as Personal Information, Student Services / Student Accounts, Financial Aid, Faculty & Advisors, Employee Information, Web Tailor Administration, and Course Summary Search.

**STEP 2:** Click the *Guest Access* link to go to your *Guest Access Portal* account.



The screenshot shows the Guest Access Portal page. The navigation menu includes: PERSONAL INFORMATION, STUDENT SERVICES / STUDENT ACCOUNTS, FINANCIAL AID, FACULTY & ADVISORS, EMPLOYEE, WEBTAILOR ADMINISTRATION, and GUEST ACCESS PORTAL. The GUEST ACCESS PORTAL tab is highlighted with a green bar. Below the navigation menu, there are links for RETURN TO MENU, SITE MAP, HELP, and EXIT. The main content area has the heading **Guest Access Portal** and a link for **Guest Access**, which is circled in red. Below the link, it says "This page allows you to add a guest to access selected information."

## STEP 3: Add A Guest (This student hasn't named a guest yet.)

- Click on the **Add Proxy** link to designate a guest.

PERSONAL INFORMATION    STUDENT SERVICES / STUDENT ACCOUNTS    FINANCIAL AID    FACULTY & ADVISORS    EMPLOYEE    WEBTAILOR ADMINISTRATION    **GUEST ACCESS PORTAL**


RETURN TO MENU    SITE MAP    HELP    EXIT

**Proxy List**  
Select Add Proxy to add your first guest, or expand a guest to define a relationship, begin and end dates, and authorizations.

Complete the following steps for each guest:  
1. Enter the required information on the Profile tab.  
2. Complete the information included on the Authorizations tab.

You can learn more information at the Guest Access Portal website.

▲ Your guest list is empty.

 [Add Proxy](#)

- Enter the first name, the last name and the e-mail address of the person to whom you wish to grant access. The e-mail address will need to be entered a second time for verification purposes.
- Click the **Add Proxy** button to automatically generate an e-mail message to your guest which includes a link to the system and a temporary password that enables your guest to finish setting up their account.

PERSONAL INFORMATION    STUDENT SERVICES / STUDENT ACCOUNTS    FINANCIAL AID    FACULTY & ADVISORS    EMPLOYEE    WEBTAILOR ADMINISTRATION    **GUEST ACCESS PORTAL**

RETURN TO MENU    SITE MAP    HELP    EXIT

**Proxy List**  
Select Add Proxy to add your first guest, or expand a guest to define a relationship, begin and end dates, and authorizations.

Complete the following steps for each guest:  
1. Enter the required information on the Profile tab.  
2. Complete the information included on the Authorizations tab.

You can learn more information at the Guest Access Portal website.

▲ Your guest list is empty.

**Add a Proxy**  
Add a new guest using the form below. Then edit their profile and authorization settings to enable appropriate access.

\* - indicates a required field.

**First Name\***   
**Last Name\***   
**E-mail Address\***   
**Verify E-mail Address\***

- A message will appear confirming that a new guest has been added.
- For a display of additional options, click on the new guest's profile link.


RETURN TO MENU    SITE MAP    HELP    EXIT


✓ A new guest has been successfully added.

**Proxy List**  
Select Add Proxy to add your first guest, or expand a guest to define a relationship, begin and end dates, and authorizations.

Complete the following steps for each guest:  
1. Enter the required information on the Profile tab.  
2. Complete the information included on the Authorizations tab.

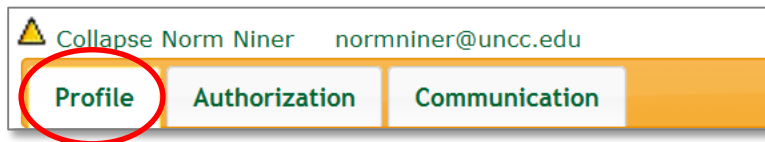
You can learn more information at the Guest Access Portal website.

▼ Expand Norm Niner  0 pages 

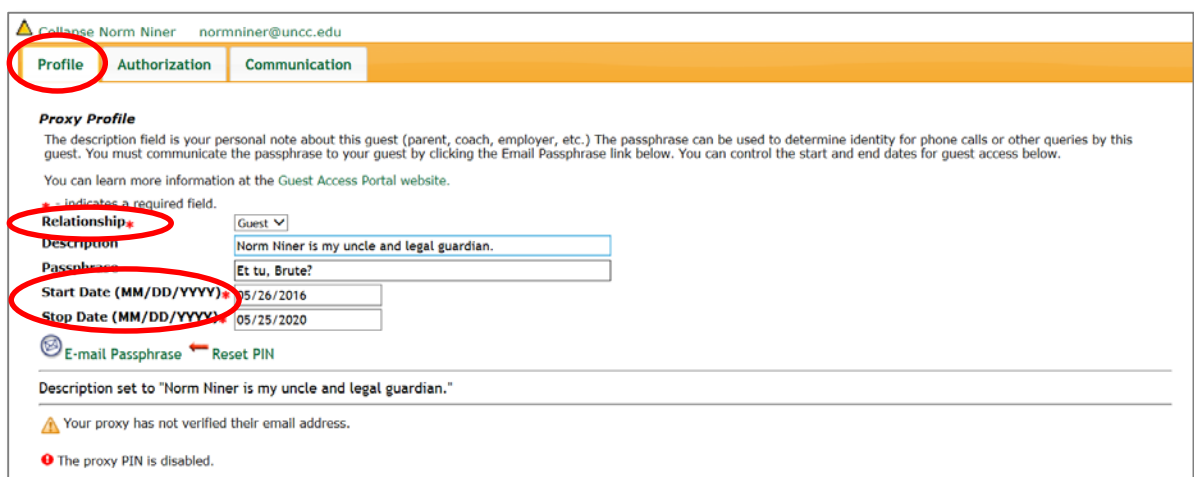
 [Add Proxy](#)

## Step 4: Set Up Your Guest Profile

- **Expand** the guest profile to reveal the following tabs:



- **In the Profile tab, specify the type of relationship** that you have with your guest.
- **Create a passphrase (optional)**
  - You have the option to create a “passphrase”—a distinct verbal expression—to be used when guests make information requests outside of the Guest Access Portal. For example, if a guest needs to speak with someone about your account information, the passphrase enables UNC Charlotte staff to confirm the guest’s identity and to see which information you have permitted the guest to view.
- **Click the *E-mail Passphrase* link to send your guest the passphrase.**
- **Set your start/stop guest access dates.**
  - By default, a guest has access to a student’s records for four years as shown in the *Start Date* and *Stop Date* range below.
  - However, you can change the length of that access by modifying the *Stop Date*.
  - You can also end a guest’s access by changing the *Stop Date* to today’s date.

A screenshot of the 'Proxy Profile' setup form. The 'Profile' tab is selected and circled in red. The form contains the following fields:

- Relationship\***: A dropdown menu with 'Guest' selected.
- Description**: A text box containing 'Norm Niner is my uncle and legal guardian.'
- Passphrase**: A text box containing 'Et tu, Brute?'.
- Start Date (MM/DD/YYYY)\***: A date picker showing '05/26/2016'.
- Stop Date (MM/DD/YYYY)\***: A date picker showing '05/25/2020'.

Below the form, there are two buttons: 'E-mail Passphrase' and 'Reset PIN'. A message at the bottom states: 'Description set to "Norm Niner is my uncle and legal guardian."' and 'Your proxy has not verified their email address.' and 'The proxy PIN is disabled.'

## Step 5: Set up Authorization

- The *Authorization* tab is where you specify what your guest can view. Each item in the list below represents a Banner Self-Service page that contains related information.

**Proxy List**  
Expand a guest to define relationship type, begin and end dates, and authorizations.

Collapse Norm Niner normniner@uncc.edu

Profile **Authorization** Communication

- Check the boxes next to the items you wish to allow your guest to view. These authorizations can be changed by you at any time.
- Click the *E-mail Authorizations* link to inform your guest about the access you provided.

Collapse Norm Niner normniner@uncc.edu

Profile Authorization Communication

**Page Authorization**  
As a student, you have the right to determine if you want to share your education records, with whom you want to share your information, and what information you wish to share. If you decide to grant access, your guest will have view-only access and will not be able to update your records, or accept financial aid awards on your behalf. You can update or change access at any time.

[E-mail Authorizations](#)

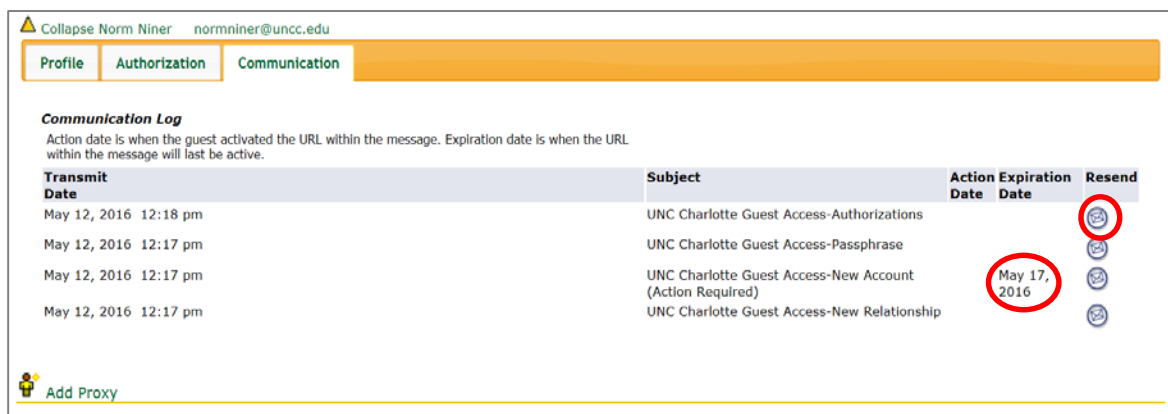
Guest Access

- Account Summary
- Advising Transcript
- Final Grades
- Financial Aid Award by Aid Year
- Financial Aid Award History
- Holds
- Make Payment (Requires Authorized User Access)
- Midterm Grades
- Registration Status
- Student Information
- Student Schedule
- Tax Notification (1098-T)
- Unofficial Transcript





## STEP 6: View the Communication Tab




- The *Communication* tab lists all of the e-mail correspondence between the student and the guest.
- **You can resend** any of these messages by clicking on the envelope icon.
- If a link to the student's account is included in any of these messages, the date that the link expires will be displayed in the *Communication Log*.



**Communication Log**  
Action date is when the guest activated the URL within the message. Expiration date is when the URL within the message will last be active.

Transmit Date	Subject	Action Expiration Date	Resend
May 12, 2016 12:18 pm	UNC Charlotte Guest Access-Authorizations		
May 12, 2016 12:17 pm	UNC Charlotte Guest Access-Passphrase		
May 12, 2016 12:17 pm	UNC Charlotte Guest Access-New Account (Action Required)	May 17, 2016	
May 12, 2016 12:17 pm	UNC Charlotte Guest Access-New Relationship		

 Add Proxy

- **Exit the Guest Access Portal** by clicking on the “X” to close your browser window.

