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.

**STEP 2:** Click the Guest Access link to go to your Guest Access Portal account.
STEP 3: Add A Guest (This student hasn’t named a guest yet.)

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

- 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 PIN that enables your guest to finish setting up their account. This PIN will only be active for FIVE days. If the PIN expires before your guest resets it, you will have to send them another email with a new PIN.
- A message will appear confirming that a new guest has been added.
- Click on the new guest’s profile link.

**Step 4: Set Up Your Guest’s Profile**

- **Expand** the guest’s profile by clicking on their name to reveal the following tabs:

  ![Profile Tab](image)

  - **In the Profile tab,** specify the type of relationship that you have with your guest.
  - **Create a passphrase** (Please note – without a passphrase, information over the phone is not allowed)
    - Create a “passphrase”—a distinct verbal password—to be used when your guest makes information requests outside of the Guest Access Portal. For example, if a guest needs to speak with someone about your account information over the phone or in person, 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.
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.

- **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.

- These checked boxes also inform UNC Charlotte staff of the information you are allowing them to release to your guest when making a request in person or over the phone.
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*.

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