

Proxy (Parent/Legal Guardian) Portal Instruction Guide





BEFORE YOU CAN CREATE PROXY ACCOUNT



- **STUDENT MUST COMPLETE THE PROXY MANAGEMENT SETUP BEFORE PROXY (PARENT or GUARDIAN) CAN CONTINUE**
- **MUST CLOSE THE STUDENT BROWSER TO BEGIN PARENT SEGMENT**

Table of Contents

[Proxy: Confirmation to Activate Account](#)

[Proxy: Creating Password](#)

[Proxy: Creating Profile](#)

[Proxy: Accessing Authorized Pages](#)

[Proxy: Passphrase](#)

[Proxy Portal Login Access](#)

[FAQ](#)

Proxy: Confirmation to Activate Account

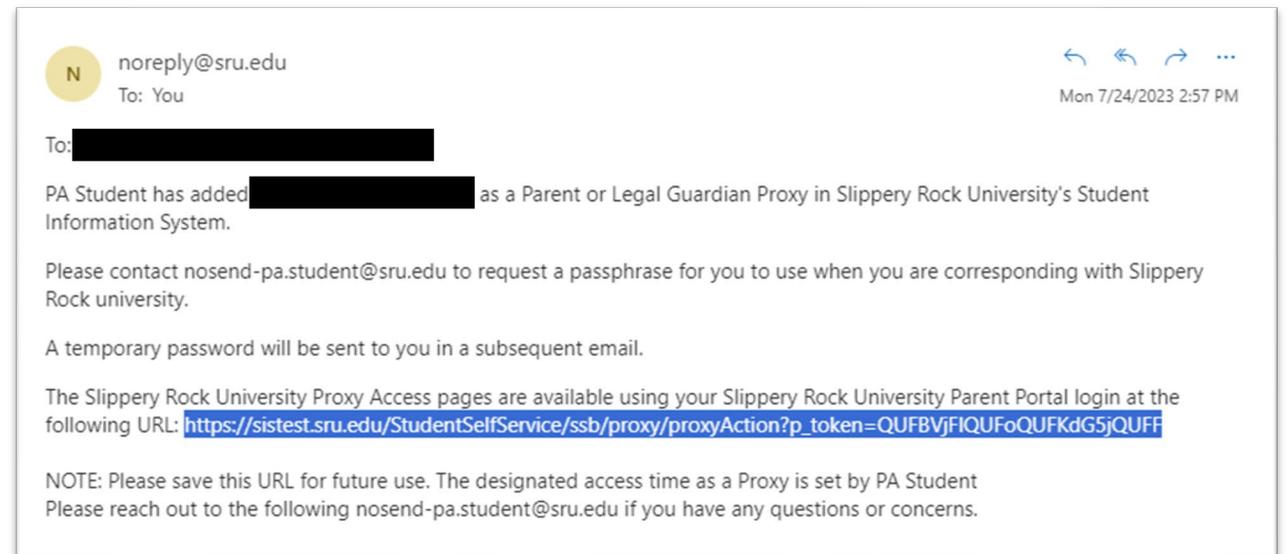
Proxy (Parent/Legal Guardian) must access their own email to activate authorization given by the student.

NOTE: Proxy has **3** days to activate, otherwise the student will need to resend

Proxy (Parent/Legal Guardian) will receive **3** emails on becoming a Proxy.

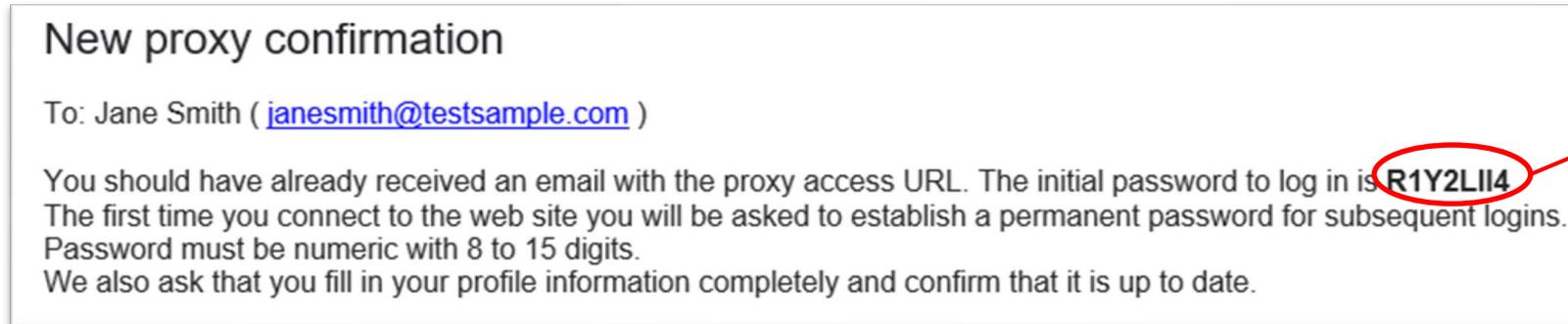
Added proxy will receive an email with a URL hyperlink in an email titled: **Updated proxy relationship**

Bookmark the URL provided for future use.



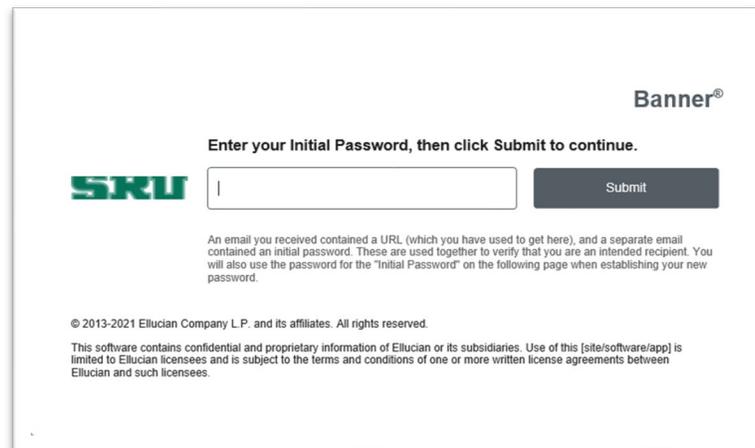
Proxy: Confirmation to Activate Account

- Proxy will receive an email with a temporary password in the email titled: **New proxy confirmation**



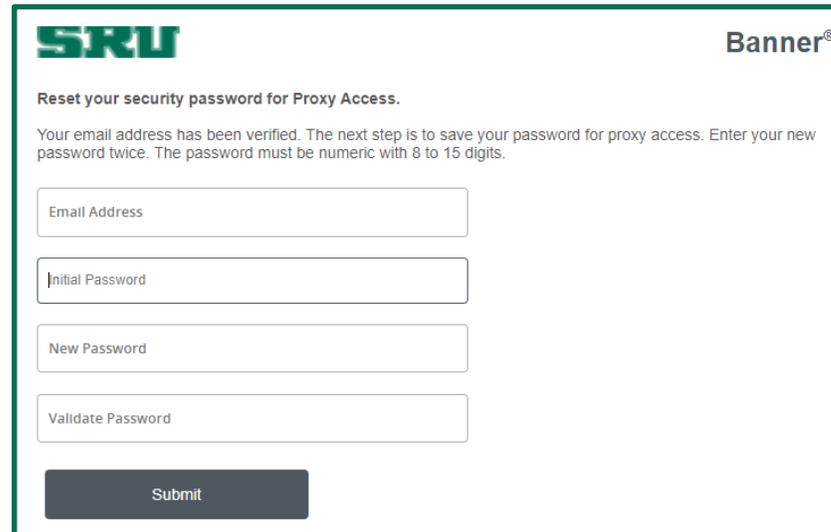
Temporary Password

- Proxy will click on link received in the email titled: **New proxy identity**
- Enter Temporary Password
- Click Submit



Proxy: Password

- Authorized proxy must reset the Password by entering their email address, temporary password used to log-in, and create a new password.
- The use of the password is to view the Student Account information online. If the Proxy wishes to verbally discuss information with University Staff, they will require a Passphrase (pg. 8)
- **Password must be numeric only and 8-15 digits long**

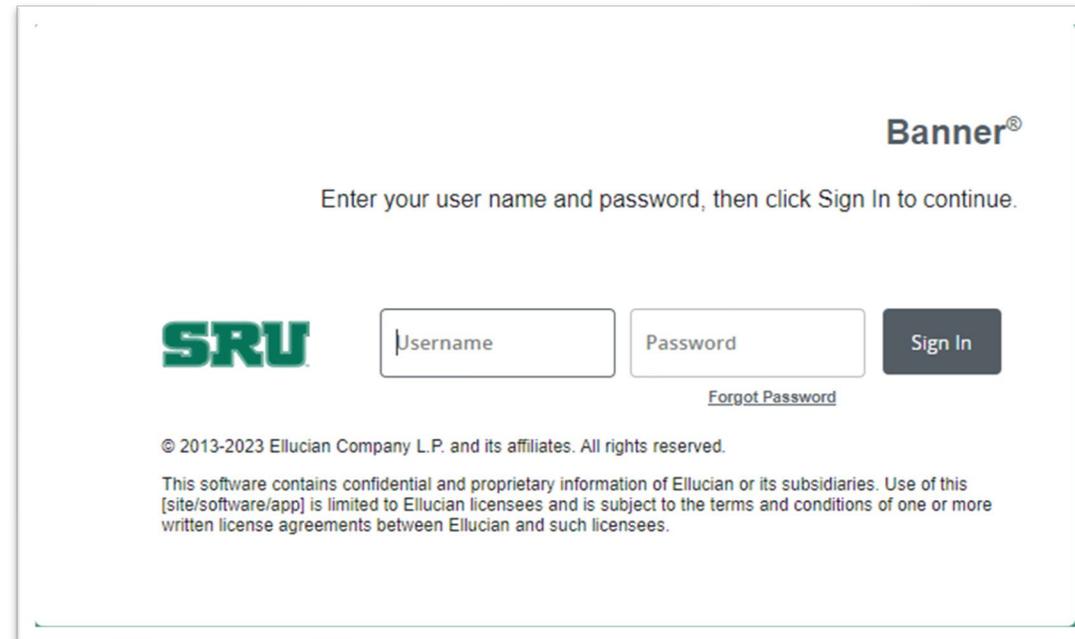


The screenshot shows a web form for resetting a security password for Proxy Access. The form is titled "SRU Banner®" and includes the following elements:

- SRU** logo in the top left corner.
- Banner®** logo in the top right corner.
- Section header: **Reset your security password for Proxy Access.**
- Instructional text: "Your email address has been verified. The next step is to save your password for proxy access. Enter your new password twice. The password must be numeric with 8 to 15 digits."
- Four input fields stacked vertically:
 - Email Address
 - Initial Password
 - New Password
 - Validate Password
- A dark grey **Submit** button at the bottom.

Proxy: Logging In

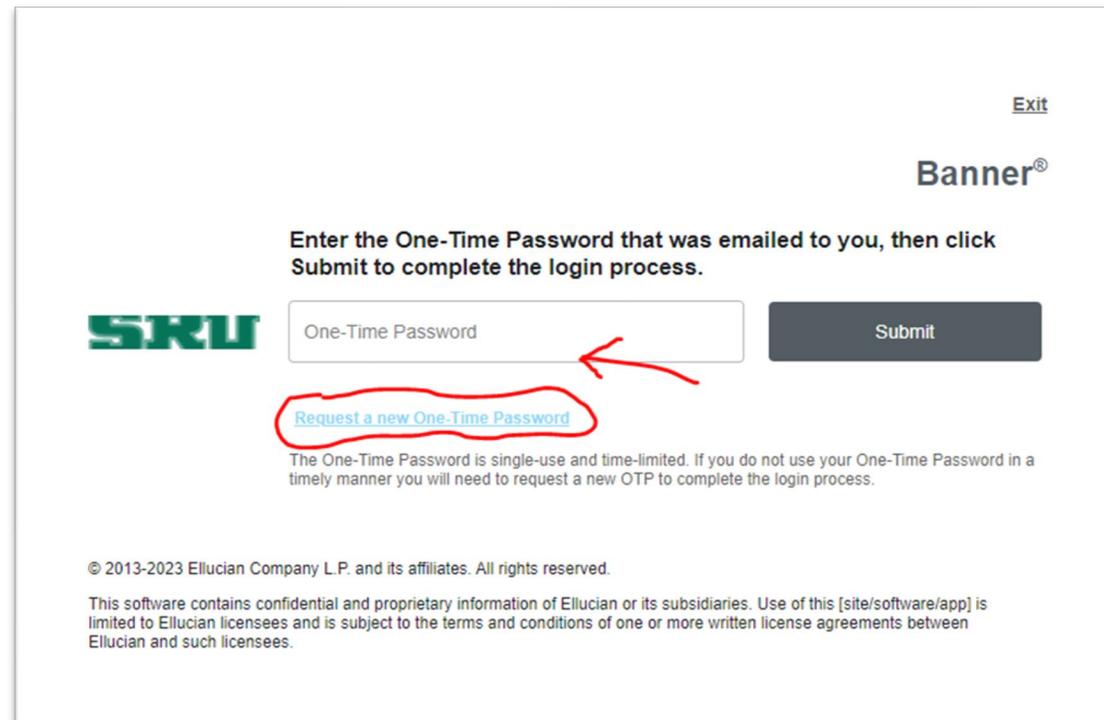
The Proxy will now be asked to login with their username (email address) and their chosen password.



The image shows a login form for Banner. At the top right is the "Banner®" logo. Below it is the instruction "Enter your user name and password, then click Sign In to continue." The form contains the SRU logo on the left, followed by a "Username" input field, a "Password" input field, and a dark "Sign In" button. Below the password field is a "Forgot Password" link. At the bottom, there is a copyright notice: "© 2013-2023 Ellucian Company L.P. and its affiliates. All rights reserved." and a disclaimer: "This software contains confidential and proprietary information of Ellucian or its subsidiaries. Use of this [site/software/app] is limited to Ellucian licensees and is subject to the terms and conditions of one or more written license agreements between Ellucian and such licensees."

Proxy: Logging In

Next, the Proxy will be prompted to enter a one-time password that will be emailed to them. If the proxy does not receive an email, they should click the “Request a new one-time password” link.



[Exit](#)

Banner®

Enter the One-Time Password that was emailed to you, then click **Submit** to complete the login process.

SRU

One-Time Password

Submit

[Request a new One-Time Password](#)

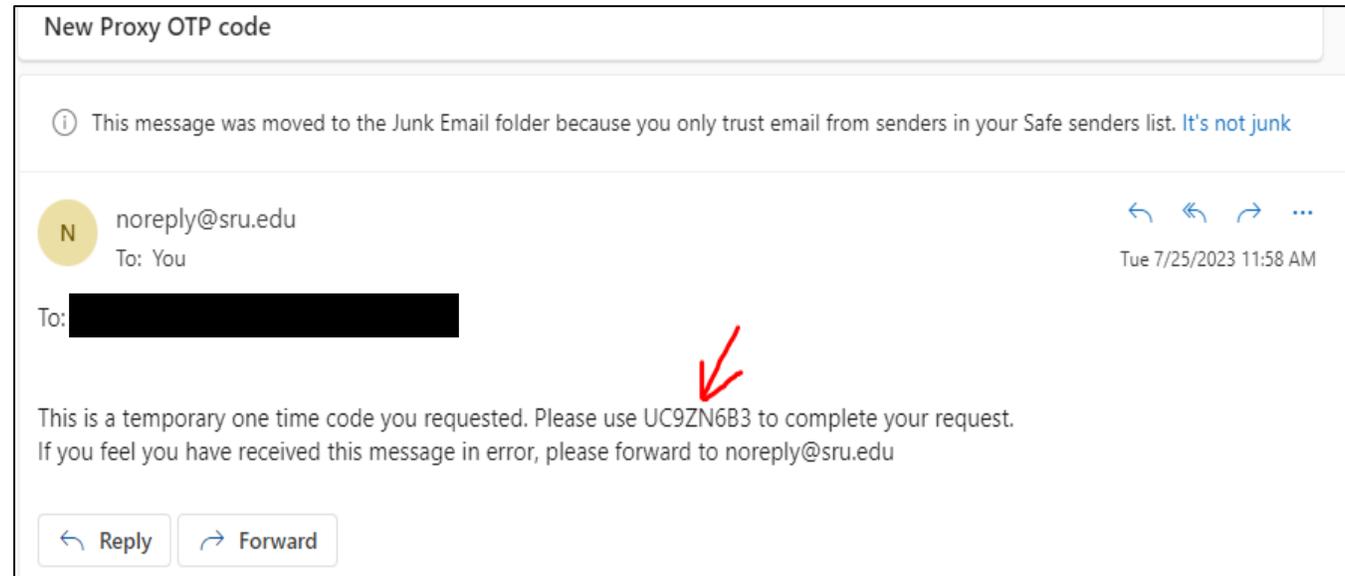
The One-Time Password is single-use and time-limited. If you do not use your One-Time Password in a timely manner you will need to request a new OTP to complete the login process.

© 2013-2023 Ellucian Company L.P. and its affiliates. All rights reserved.

This software contains confidential and proprietary information of Ellucian or its subsidiaries. Use of this [site/software/app] is limited to Ellucian licensees and is subject to the terms and conditions of one or more written license agreements between Ellucian and such licensees.

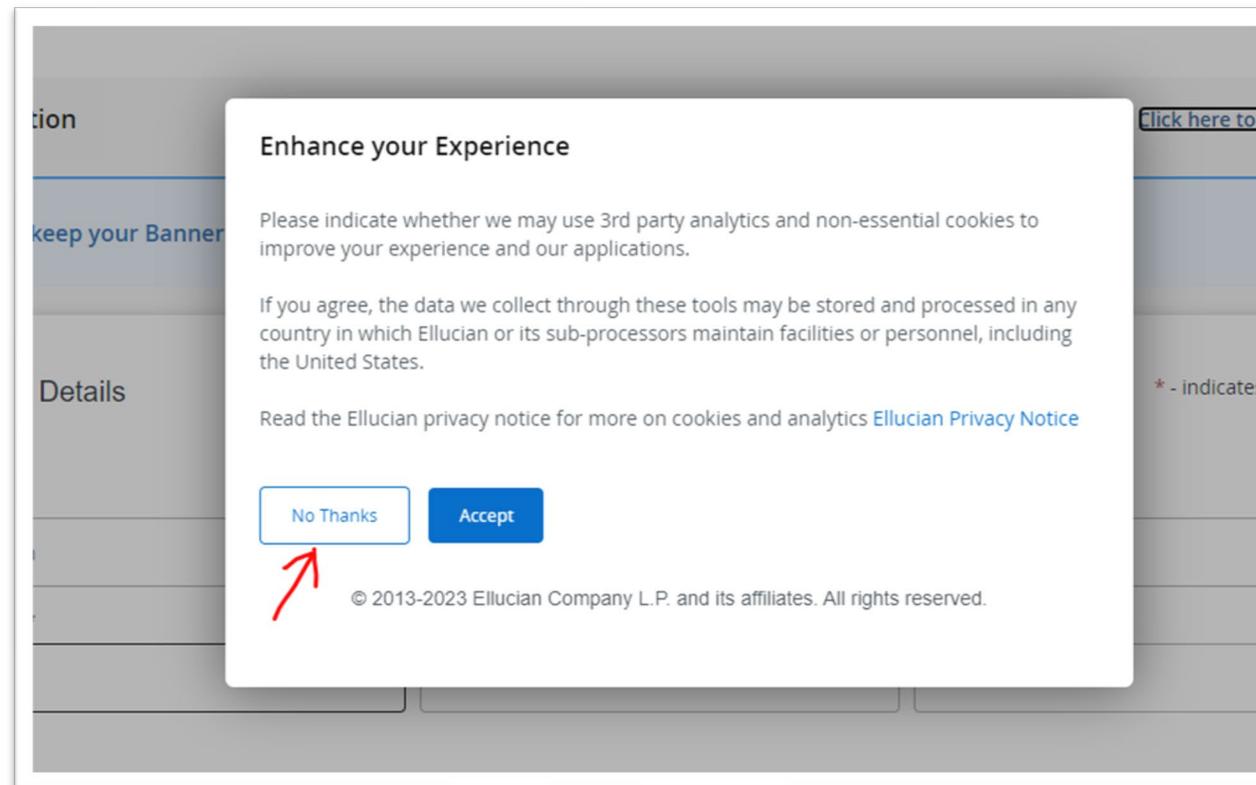
Proxy: Logging In

The one-time password will be emailed to the Proxy with the subject link “New Proxy OTP Code.” Enter this code in the “One-Time Password” field.



Proxy: Logging In

The next screen may show the following window if this is the first time the proxy has accessed the portal. Dismiss the prompt by clicking either button.



Proxy: Creating Profile

Proxy will complete all the required information and click Submit

Personal Details * - indicates a required field.

| | | |
|---------------------------------|-----------------------------------|-----------------------------------|
| Salutation Salutation | First Name* First Name | Middle Name Middle Name |
| Last Name* Last Name | Name Suffix Name Suffix | Nickname Nickname |

Contact * - indicates a required field.

| | | |
|---|---|-------------------------------------|
| Home E-Mail Address* | Phone Area Code Phone Area Code | Phone Number Phone Number |
| Phone Extension Phone Extension | | |

Address * - indicates a required field.

| | | |
|--|---|---|
| Mailing Address Line 1* Mailing Address Line 1 | Mailing Address Line 2 Mailing Address Line 2 | Mailing Address Line 3 Mailing Address Line 3 |
| City* City | State State | Zip Code* Zip Code |
| Nation* Nation | | |

Proxy: Accessing Authorized Pages

Proxy will be able to select from the drop down menu what they wish to view based on the authorization of information set by Student

 You've been authorized to view content for the student(s) below. Click each tile to select the page you wish to view.

 **Proxy Personal Information**
View/Update Proxy Personal Information. 

 I am a proxy for Test Student0019

Select to view

- Account Summary
- Award Package
- Award History
- Student Detail Schedule
- Week at Glance

If Proxy needs to update personal or contact information, click here. Make necessary updates. Click Submit.

Proxy: Passphrase

- The Passphrase is used when a Proxy (Parent/ Legal Guardian) wants to call and discuss information with some University Staff.
 - For example - Academic Records & Registration Office, Student Accounts, Financial Aid.
- The student must assign a Passphrase to the Proxy under Proxy Management. The student can provide Proxy's the Passphrase verbally or through an automated email titled: **Send updated proxy passphrase**. Sample Below:

Send updated proxy passphrase

To: Emily Shaffer (janesmith@testsample.com)

Jane Smith has established the following passphrase for you to use when you are corresponding with Slippery Rock University:

PASSPHRASE TEST

The Slippery Rock University Proxy Access pages are available using the Slippery Rock University Proxy Web login at the following URL:

<https://sistest.sru.edu/StudentSelfService/login/auth>

If you feel you have received this message in error, please forward to janesmith@testsample.com

Proxy Portal Login Access

Now that you have set up your account to access the Student's information, a Proxy login page has been created for easy access as follows.

<http://www.sru.edu> and scroll to the bottom of the page and click on Family Link

OR

<http://www.sru.edu/family/parent-portal>

Click on **Parent Portal** on the left-hand side of the page

Navigate to **Access Parent Portal** at the bottom of the page and click on the "click here" link for login screen.

If you experience any problems, please contact the IATS Help Desk

Location: 104 Maltby Center

Hours: Monday – Friday 8:00 a.m. – 4:30 p.m.

Phone: 724.738.4357 (HELP) or campus extension x4357

Email: helpdesk@sru.edu

FAQ

1. What is Self-Service Banner?

Self-Service Banner is the self-service (Web-based) product used by students, faculty, staff and advisors. A secure web product, Self-Service Banner retrieves and records data directly to and from the Banner database, based upon the user's role in Banner. All information is live and in real time. Self-Service Banner provides information in an easy-to-read format that is available from any computer connected to the Internet.

2. Which browser do I use?

If you run on Windows (PC) use Internet Explorer, Firefox, or Chrome. If you run on Mac use Firefox or Safari.

3. As a student, how do I access Student Self-Service Banner?

Click the MySRU Icon located in the top right hand corner of Slippery Rock University's homepage.

Policy prohibits access to the system by anyone other than the authorized user.

4. Is there a time limit on Student Self-Service Banner (SSB)?

Yes. Self-Service Banner (SSB) will timeout after 60 minutes.

6. If my student status is "inactive," will the proxy (parent) have access to student records in the Parent Portal?

No, once the student is coded as "inactive," access to all student information is deactivated.

7. As a student, can I change the Stop date of the proxy?

Yes. If the end date is updated, it will be an overnight process.

FAQ

8. As a parent, how do I change my password?

Located on the Parent Profile page, there is a link to change your password.

9. As a proxy, what if I do not receive my email to activate my account?

Contact the student assigning you as proxy. The student will need to access their Communication tab within the proxy management and resend the email to your email account.

10. As a proxy, how much time do I have to set up my account once I receive my “New Proxy Identity” email?

The encrypted link in the email you receive has a limited timeframe – 3 days. If the proxy does not set up within 3 days, the student must resend the email labeled “New Proxy Identity”. The student can locate the email under the Communication tab in Proxy management.

11. As a proxy, where do I locate the link to login to view my students’ information once I have set up my account?

<http://www.sru.edu> and click on the **Family** link at the bottom of the page

OR

<http://www.sru.edu/family/parent-portal>

Click on **Parent Portal** on left hand side of page

Locate ACCESS PARENT PORTAL at the bottom of page and click on the “click here” link for login screen.

FAQ

12. How does the parent become an authorized user in the TouchNet system to access student billing information and payment options?

The student must authorize all new users for TouchNet to pay the bill.

The student will login to MySRU.

Click on the Billing Tab.

Click “Pay or View My Bill”

Under My Profile Setup, choose Authorized Users, the Add Authorized User.

13. What if I lose my TouchNet access information?

Contact Student Accounts at 724.738.2088 for assistance.

14. Who do I call for help? Contact the IATS Help Desk

Location: 104 Maltby Center

Hours: Monday - Friday 8:00 a.m. - 4:30 p.m.

Phone: 724.738.4357 (HELP) or campus extension x4357

Email: helpdesk@sru.edu