Instructions for a Student to add a Proxy User

Proxy will allow a student to grant access to a parent/spouse/grandparent, etc. to view the information that the student authorized them to view in Self-Services. Proxy DOES NOT give the User permission to talk to faculty/staff. The student will need to complete the Access to Student Information Consent form and provide the code to the authorized individual(s) in order for the User to speak to IWCC staff about the student's financial records.

Student will log into ROC. The Proxy can be accessed two ways.

Either click on your username and choose View/Add Proxy Access.
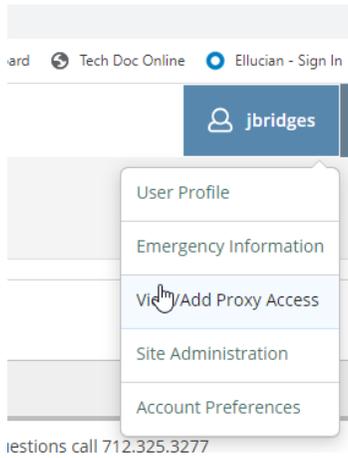
Or click on User Options (last option on the menu on the left side of the Self-Service Menu) and choose View/Add Proxy Access.
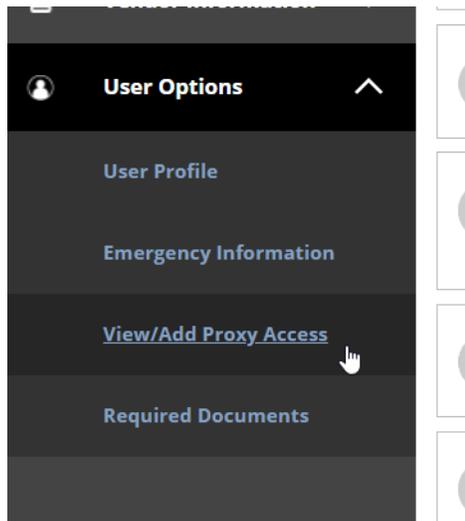
This is the view of the "home" Proxy screen.

After a Proxy is added, that information will be populated in the Active Proxies field.

View/Add Proxy Access

> ⓘ To see what access you permitted for an Active Proxy, or to change what an Active Proxy can see, click the pencil icon on the Active Proxies.
>
> To give your proxy permission to speak to someone at IWCC about your finances, complete and submit an Access to Student Information Consent form. The form can be found on the Record and Registration page on ROC.

Active Proxies

> ⓘ 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

> ⓘ Your proxy will get an email when your request has been processed.
>
> You may change what the proxy can see at any time.
>
> Please provide as much information about the proxy as you can.

To create a record for the new Proxy, click on the dropdown box under Select a Proxy.

Select a Proxy

[Please Select ⌄]

Then click on Add Another User.

[Add Another User]

The student will need to complete the required fields. We request that the student complete as much information as possible in order to avoid creating a duplicate in the system.

Select a Proxy

[Add Another User ⌄]

First Name *	Middle Name	Last Name *
First Name	Middle Name	Last Name

Suffix	Former Last Name	Email Address *
Please Select	Former Last Name	Email Address

Confirm Email Address *	Email Type	Phone *
Email Address	Please Select	Phone

Phone Type	Birth Date *	Gender
Please Select	MM/DD/YYYY	Please Select

Relationship *

[Please Select ⌄]

The Access will default to "Allow Select Access". If left on that option, the student will need to click on the box next to each option to grant access to that option.

The student can click on "Allow Complete Access" to grant access to all options listed.

The student can hover over the blue Information icons to learn (a little) more about each topic.

Notifications is any holds that the students have on their account.

Grades will show Progress Reports (listed as Midterms 1 and 2) and final grades.

Access *

◯ Allow Complete Access

🔵 Allow Select Access

☐ **Student Finance** ⓘ	☐ **Financial Aid** ⓘ
☐ Account Activity	☐ Offer Letter
☐ Account Summary	☐ Financial Aid Home
☐ Make a Payment	
	☐ My Awards
	☐ FA Required Documents
	☐ Satisfactory Academic Progress

☐ **General** ⓘ	☐ **Academics** ⓘ
☐ Notifications	☐ Grades

☐ **Tax Information** ⓘ
☐ Tax Information

Tax Information: The student must opt in to receive the 1098 electronically in Student Self Services.

If they do opt in, this is what the Proxy user will see:

1098 Information

You have opted to receive your 1098 in electronic format.

ⓘ **Receive my 1098 only in electronic format**
By selecting this option, I agree to receive my official 1098-T only in electronic format by accessing it on ROC Self Services.

1098 Statements

Tax Year	Notation

If they do not, this is what the Proxy user will see:

After the information is filled out, the student must click on the box to authorize the Proxy and then click on Submit.

The student will have to fill in their password again and the request will be processed.

An email will be sent to the user:
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Dear (name of Proxy User),

You have been granted proxy access to (name of student)'s account at Iowa Western Community College. You can access the student's account on Self-Service.

The following login has been created for your use at Iowa Western Community College. Your temporary password will arrive in a separate email.
Username: **firstname.lastname** (limited to 10 characters each for first and last name)

You can access the student's account on Self-Service.

_____

Followed by an email with a password
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Dear (name of Proxy User),

Here is your temporary password for the login you received earlier from Iowa Western Community College.

Password: **kT11B1mE**

You can access the student's account on Self-Service.

_____
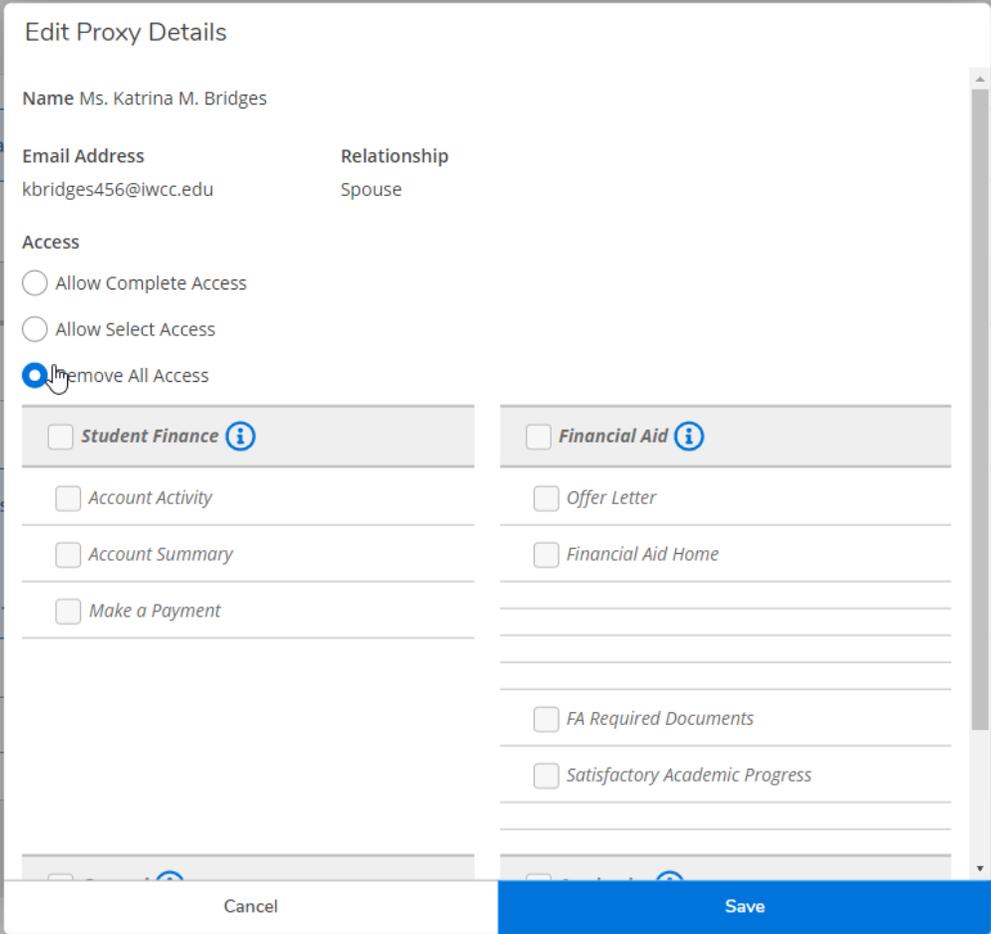
If the student changes or removes the Proxy's access, the Proxy User will get an email.
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Dear (name of Proxy User),

Your proxy access to (name of student)'s account at Iowa Western Community College has been updated or removed.

If you have questions, please contact the student.

A student can adjust or remove all access by going back to the Proxy menu.

Click on the pencil icon associated with the Proxy in the Active Proxies field.

Active Proxies

Name	Proxy Access	Relationship	Effective Date	
Ms. Katrina M. Bridges	Student Finance, Financial Aid, General, Academics	Spouse	3/10/2021	✎

Add a Proxy

Click on desired topics to add or remove or click on Remove All Access

Save

Edit Proxy Details

Name Ms. Katrina M. Bridges

Email Address
kbridges456@iwcc.edu

Relationship
Spouse

Access

○ Allow Complete Access

○ Allow Select Access

● Remove All Access

☐ **Student Finance** ⓘ	☐ **Financial Aid** ⓘ
☐ Account Activity	☐ Offer Letter
☐ Account Summary	☐ Financial Aid Home
☐ Make a Payment	
	☐ FA Required Documents
	☐ Satisfactory Academic Progress

Cancel   Save