ACCESS BGSU

Open Forum

February 17, 2016
Agenda

What is Access BGSU?
What can be viewed?
How does it work?
What is the Back Office Screen?
When will it be available?
Where can I go for more information?
Questions
What Is Access BGSU?
Access BGSU provides the Student with the ability to share their important information with a proxy of their choice.
### Understanding the Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td>Delegation</td>
<td>The act of delegating access to another person</td>
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<tr>
<td>Delegator</td>
<td>This is the student; the person that delegates access to another person</td>
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<tr>
<td>Proxy</td>
<td>The person that is granted the access (parent, spouse, relative, etc.)</td>
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Understanding the Process

An Overview of the Delegated Access Process

1. **Setup**: Define what can be delegated.
2. **Delegator**: Delegator delegates access to a proxy.
3. **System**:
   - **Email Notification**: Both Delegator and proxy are notified at the time of delegation.
   - **NUR (Proxy logs in)**: Proxy uses an existing User ID or creates a new one.
4. **Proxy**:
   - **Terms & Cond’s**: Proxy accepts the Terms & Conditions and SUBMTS.
5. **Proxy User Experience**: Proxy navigates to the “Shared Information Center”.

Proxy email includes a URL to access school system.
What Can Be Viewed?
### Shared Information Could Include:

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Description</th>
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<tbody>
<tr>
<td>Bursar Information</td>
<td>Viewing billing information, payment information, payment options</td>
</tr>
<tr>
<td>Financial Aid Information</td>
<td>Viewing Financial Aid and Scholarship information</td>
</tr>
<tr>
<td>To Do List</td>
<td>Viewing the pending items on your to do list</td>
</tr>
<tr>
<td>Holds</td>
<td>Viewing the holds placed on your record for specific areas</td>
</tr>
<tr>
<td>Grade Information</td>
<td>Viewing grades at the end of the semester, as well as semester and cumulative GPA</td>
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</table>
What’s the Student’s role?

Student:
- Initiates all delegation requests
- Can delegate 1 or more of the 5 transactions
- Can remove proxy access at any time to 1 or all of the transactions
- Can delegate to multiple proxies at the same time
- Must agree to the Terms and Conditions before access can be shared
What’s the Proxy’s role?

» **Proxy:**
  » Must accept the delegation request in order to gain access to the students information
  » Must agree to the Terms and Conditions before information can be viewed
  » Has view only access to the students information – cannot change any information
  » Can have access to multiple student accounts at the same time
How does this affect CashNet access?

- As of March 21, 2016 - CashNet will be accessed directly through Access BGSU
- Parents that have existing access to View Bill & Make Payment will need to be granted access via the Access BGSU process – the existing Parent Pin will not work once Access BGSU goes live

Note: During this transition, parents can still log into CashNet with the Students ID and Last Name in order to make a payment. This will allow for a means to access CashNet while Access BGSU authorization is being established by the Student.
HOW DOES IT WORK?
Access BGSU Demo

ACCESS BGSU
Bowling Green State University / Information Technology Services / Access BGSU

ACCESS BGSU IS CURRENTLY UNDER CONSTRUCTION
Coming March 2016

CHECK BACK REGULARLY FOR UPDATED INFORMATION

BGSU is excited to introduce the new Access BGSU feature to students and their families. Access BGSU provides BGSU students with a means for sharing important information with a designated proxy (parent, guardian, spouse, etc.) The student will initiate the process by inviting the proxy of their choice to accept an offer to view student and financial information. Upon accepting, the proxy will be granted access only to specific information that the student chooses to share.

SHARABLE TRANSACTIONS

- View Bill & Make Payment
- View Financial Aid Information
- View To Do’s
- View Holds
- View Grades
The Student will initiate the delegation process by logging into MyBGSU and clicking on Student Center
» Click on the new **Share My Information** button
Click on Delegate Access to a New Contact
The Student will read the Terms and Conditions and then click on I Accept.
» Enter the contact information for your proxy
» Select those transactions that you would like to share
» Click on Save
» The Student will receive a message that an email will be sent to the proxy.

» **Click on OK**, then **click on OK** again.

![Message](image)

**Save Confirmation**

- The Save was successful.
» The Student can now see the delegation has been submitted and is pending acceptance.

» Once the delegation has been accepted, the status will change to accepted.
The Proxy, Freddie, will receive an email with instructions on how to create the new Access BGSU account.

Freddie Falcon, you have been granted access to Frieda Falcon's student records at Bowling Green State University (BGSU). By following the instructions below you will be able to view the following transactions on Frieda's behalf:

- Bursar Information
- Financial Aid Information
- Grade Information
- View Holds
- View To Do List

To access Frieda's data for the first time follow the steps below.

**New Delegate Access Instructions:**

1. Click this link to access the BGSU Student Data. You will be guided through the steps to create a BGSU User ID. Use the same email address to which this notification was sent.

2. Accept or decline the "Terms and Conditions for accessing BGSU Student Data". **NOTE:** If you decline the 'Terms and Conditions' your access to the student's data will not be granted.

3. If you accept, enter the following two pieces of information:
   - a) The Security Key: yutxjpy (copy this code to use on the 'Terms and Conditions' page)
   - b) The email address to which this notification was sent.

Any questions should be directed to the Technology Support Center (TSC) by calling (419)372-0999 or visiting the web site www.bgsu.edu/tsc.
» Freddie will **Click** on the **Link** in the email to Create a New Account.

**New Delegate Access Instructions:**

1. Click this [link](#) to access the BGSU Student Data. You will be guided through the steps to create a BGSU User ID. Use the same email address to which this notification was sent.

2. Accept or decline the "Terms and Conditions for accessing BGSU Student Data". **NOTE:** If you decline the 'Terms and Conditions' your access to the student's data will not be granted.

3. If you accept, enter the following two pieces of information:
   
   a) The **Security Key**: yvtxsPy (copy this code to use on the 'Terms and Conditions' page)

   b) The email address to which this notification was sent.
» Freddie will enter his information and click on Create Account.

» If Freddie already has an account set up, he would enter his email address and password under Returning User Login.
Read and then accept the Terms and Conditions.

Enter the security key from the email and also enter the email address where you just received the notification.

Click on Submit.
Freddie now has access to Frieda’s student and financial information.

Simply click on each transaction to view it.

It is recommended to go to Password Control and create a security question in case you forget your password and need to reset it later.
» Click on View Bill & Make Payment.
» Click on the **Student’s Name**.

» Make sure you have pop-ups enabled so that a new window can open.
You will now be able to view Frieda’s bills or make a payment.

Click on Sign Out when finished.

Close this browser tab and Click on the Access BGSU tab to continue.

Note: Students must re-grant Parent / Proxy access to View Bill & Make Payment through Access BGSU starting March 21, 2016.
» Click on View Financial Aid Information.
» Click on **Search** for a list of all options.

» **Select** the aid year that you want to view.
» You can now view the Financial Aid Award Summary for that year.

» Click on Return to Aid Year Selection to view another year, or click on Home to return to the main menu.
» **Click on View To Do’s.**
» **Click** on **Search** for a list of all options.

» **Frieda** does not have any to do’s listed.

» **Click** on **Home** to return to the main menu.
Click on View Holds.
» Click on Search for a list of all hold options.
» Select the hold that you want to view.
More detail about that hold will be displayed.

- **Click** on **Return** to go back to the holds menu, or **Home** to go back to the main menu.
» **Click on View Grades.**
» Click on Search for a list of all options.

» Select the term that you want to view the grades for, and click on Continue.
Frieda’s grades for that term will be displayed.

Click on Home to go back to the main menu.
To return to the Access BGSU page at a later time, go to www.bgsu.edu/accessbgsu and click on the Returning User Login button.
What Is The Back Office Screen?
The Back Office screen will be used by employees within the Bursar, Financial Aid, and Registration and Records to view who has been granted access and what transactions have been shared.
The initial Transaction Status is submitted until the Proxy accepts the terms and conditions and then creates the account. The status then shows as Accepted.
When Will It Be Available?
Access BGSU Go Live

» March 21, 2016

March 2016

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Where Can I Go For More Information?
For More Information

» www.bgsu.edu/accessbgsu

» Includes step by step training documentation for the Student and Proxy
Questions and Answers