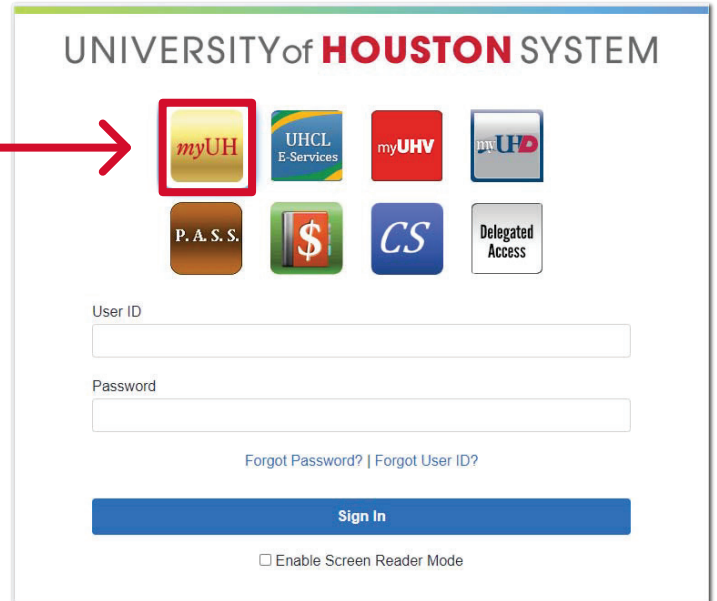


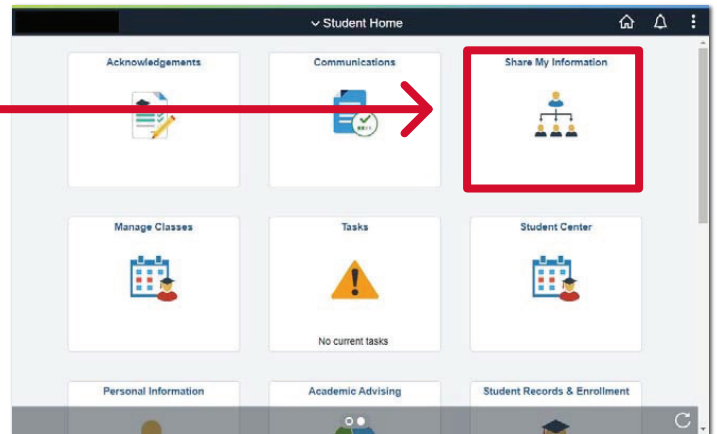
# DELEGATED ACCESS

## Granting Access Guide

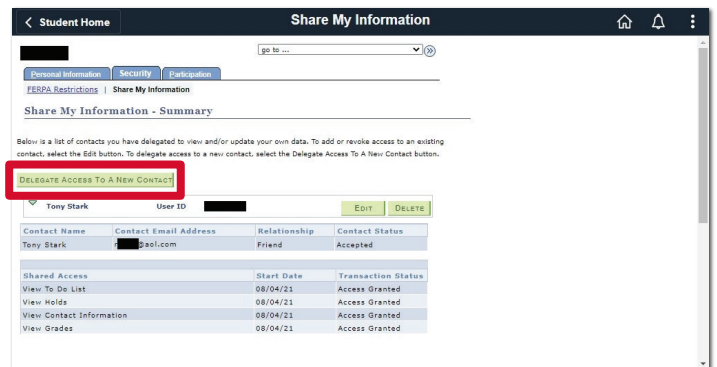
**STEP 1:** Student logs in to Student Self-Service.



**STEP 2:** Student clicks on the **Share My Information** tile to navigate the Share My Information page.



**STEP 3:** Student clicks on the **Delegate Access To A New Contact** button.



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**STEP 4:** Student fills out the information of the delegate that they would invite to access their information and then clicks on the **Authenticate Identity** button.

The screenshot shows the 'Share My Information - Details' page. At the top, there are fields for '\*Contact Name', '\*For the purpose of informing', '\*Relationship', '\*Contact Email Address', and '\*Confirm Email Address'. Below these is a table with columns for 'Transaction Name', 'Description', and 'Transaction Status'. The table lists several delegation options, each with a checkbox and a description. At the bottom of the table, there are 'Select All' and 'Clear All' buttons. Below the table, the 'Authenticate Identity' button is highlighted with a red box. The page also shows 'Verification Status: Pending' and a 'Save' button at the bottom.

Transaction Name	Description	Transaction Status
<input type="checkbox"/> Make a Payment	Delegate the ability to Make a Payment on your account	
<input type="checkbox"/> View Contact Information	Delegate the ability to view your phone numbers, email addresses and addresses.	
<input type="checkbox"/> View Financial Aid	Delegate the ability to view your Financial Aid information.	
<input type="checkbox"/> View Grades	Delegate ability to view your grades.	
<input type="checkbox"/> View Holds	Delegate the ability to view the holds placed on your record for specific services.	
<input type="checkbox"/> View To Do List	Delegate the ability to view the pending items on your to do list generated by the institution.	

**STEP 5:** Student clicks on the **Send PIN to email** button.

The screenshot shows the 'Share My Info Details' page. It displays 'Student Authentication' information, including 'Empid' and 'Verification Status'. A 'Send PIN to email' button is highlighted with a red box. Below this button, there is a 'Resend PIN' button, an 'Enter PIN' field, and a 'Verify' button. At the bottom, there are 'Proceed with saving Delegate' and 'Cancel' buttons.

**STEP 6:** Student receives email for the PIN.

The screenshot shows an email titled 'Delegate Access Student Authentication PIN' from 'sa92tst@central.uh.edu' to '@uh.edu'. The email content includes instructions for creating or modifying a delegate and states: 'Your Student Authorization PIN is 2901.' The PIN is highlighted with a red box. The email also includes a warning that the PIN expires in 15 minutes and a note that it is an auto-generated message.

**STEP 7:** Student enters the PIN on the page and clicks on the **Verify** button.

The screenshot shows the 'Share My Info Details' page. It displays 'Student Authentication' information, including 'Empid' and 'Verification Status'. A 'Send PIN to email' button is highlighted with a red box. Below this button, there is a 'Resend PIN' button, an 'Enter PIN: 2901' field, and a 'Verify' button. At the bottom, there are 'Proceed with saving Delegate' and 'Cancel' buttons.

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**STEP 8:** Student enters a last name and a first name for the digital signature, checks the **“I accept the terms and conditions”** checkbox, and then clicks on the **Save** button.

<input type="checkbox"/> View Contact Information	Delegate the ability to view your phone numbers, email addresses and addresses.
<input type="checkbox"/> View Emergency Contacts	Delegate the ability to view and update your emergency contacts.
<input checked="" type="checkbox"/> View Grades	Delegate ability to view your grades.
<input checked="" type="checkbox"/> View Holds	Delegate the ability to view the holds placed on your record for specific services.
<input checked="" type="checkbox"/> View To Do List	Delegate the ability to view the pending items on your to do list generated by the institution.

Select All Clear All

Authenticate Identity Verification Status: Complete

Please enter your name in Last name, First name format and press Enter to continue  
[Redacted] Date 08/08/2021

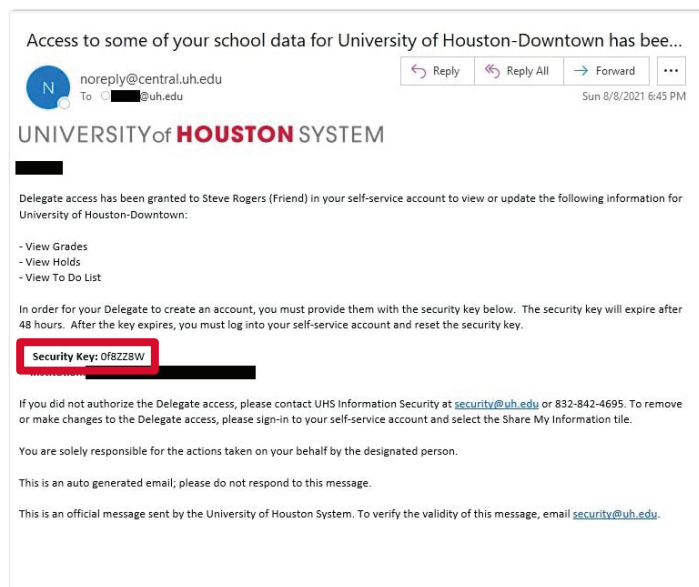
I accept terms and conditions

I decline to electronically sign this agreement.  
To request paper copies of documents or, withdraw consent to conduct business electronically, please contact the registrar's office by phone or e-mail. In order to release the information in a paper format, students will need to complete the UH System FERPA Release Form.  
[Terms and Conditions](#)

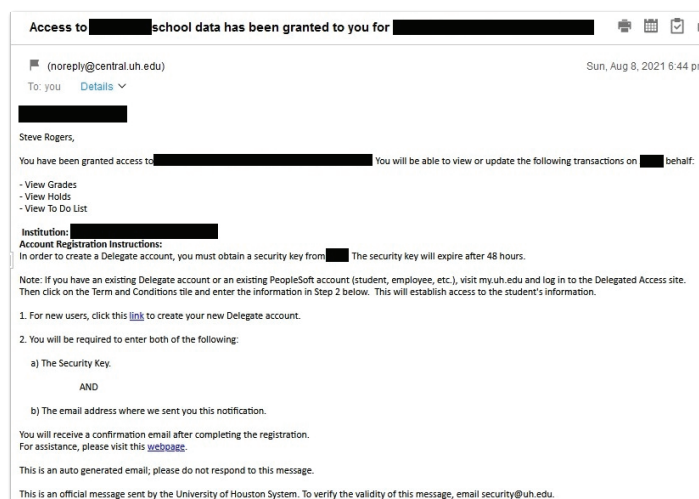
Save

Return to Share My Information Summary

**STEP 9:** Student receives an email acknowledgment that contains a key to be used by the delegate.



**STEP 10:** The delegate receives an email for the instruction to create an account to access the student's information.



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**STEP 11:** The delegate clicks on the link identified above and then fills out the information as in the example below.

The screenshot shows the 'UNIVERSITY of HOUSTON SYSTEM' 'Create Account' form. It includes fields for User ID (P000035), Password, Confirm Password, First Name (Steve), Last Name (Rogers), Email Address, and two security questions. The first security question is 'What high school did I graduate from?' with a response of 'LH'. The second security question is 'Where was I born?' with a response of 'HOUSTON'. Below the form is a 'Terms and Conditions' section with a checkbox for 'I accept terms and conditions' which is checked. At the bottom, there are fields for Security Key (08228V) and Contact Email, followed by a 'Create Account' button.

**STEP 12:** After clicking on the **Create Account** button, the delegate is presented with a confirmation message.

The screenshot shows a confirmation message from Steve Rogers titled 'Delegated Access Completion'. The message states: 'A confirmation email with your Delegate User ID, registered email address, and the log in URL, has been emailed to you. You will now be logged out and are required to log in to view the student's data.' There is an 'OK' button at the bottom.

**STEP 13:** In addition, the delegate receives a confirmation email that contains the User ID assigned to the delegate to be used for logging in.

The screenshot shows an email titled 'Delegate Access Account Confirmation' from sa92tst@central.uh.edu, dated Sun 8/8/2021 11:50 PM. The email content is as follows:

Thank you for accepting the Terms and Conditions to establish your Delegate Access. You can log in with your User ID or Email ID found below. You can also find the executed Terms and Conditions that you agreed to and instructions on how to log in below.

Your Delegate User ID is P000035.  
Your Delegate Login Email ID is [redacted]@outlook.com.

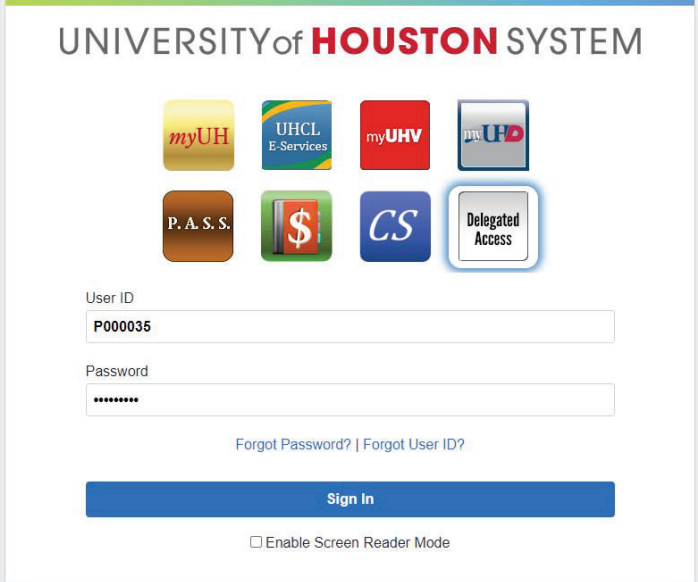
Name: Steve Rogers  
Accepted Date: 2021-08-08  
Institution: [redacted]

Terms and Conditions: You have been granted access to view data that belongs to a student. The privacy of student education records is protected by a federal law known as the Family Educational Rights and Privacy Act (FERPA) 20 U.S.C. Section 1232g; 34 CFR Part 99. FERPA is a Federal law that is administered by the Family Policy Compliance Office (Office) in the U.S. Department of Education (Department). 20 U.S.C. Section 1232g; 34 CFR Part 99. Once a student reaches 18 years of age or attends a postsecondary institution, he or she becomes an "eligible student," and all rights formerly given to parents under FERPA transfer to the student. The eligible student has the right to have access to his or her education records, the right to seek to have the records amended, the right to have control over the disclosure of personally identifiable information from the records (except in certain circumstances specified in the FERPA regulations), and the right to file a complaint with the Department. The term "education records" is defined as those records that contain information directly related to a student and which are maintained by an educational agency or institution or by a party acting for the agency or institution. By requesting authorization to view student information and records, you understand any records accessed must be held in trust and confidence. By

# DELEGATED ACCESS

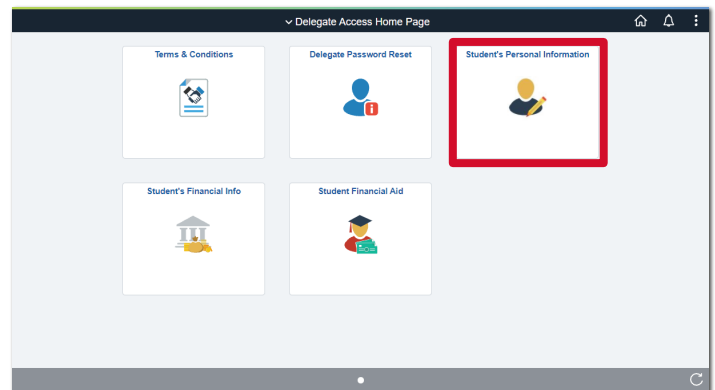
## Granting Access Guide

**STEP 14:** The delegate can now login by using the portal below with the User ID that has been assigned to them and a password that they have created.

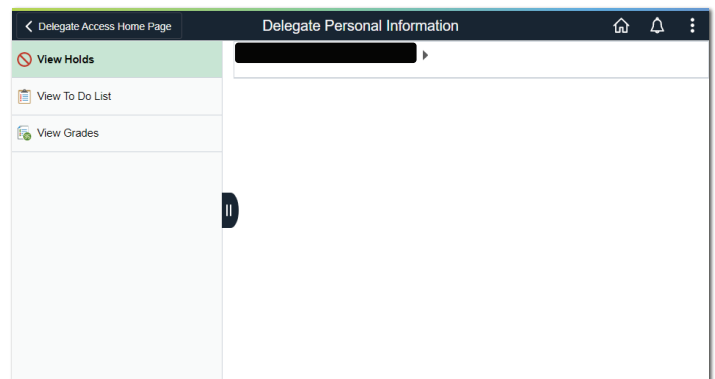


The image shows the login portal for the University of Houston System. At the top, it says "UNIVERSITY of HOUSTON SYSTEM". Below this are several service icons: myUH, UHCL E-Services, myUHV, myUPD, P.A.S.S., a dollar sign icon, CS, and Delegated Access. The Delegated Access icon is highlighted with a blue border. Below the icons are two input fields: "User ID" with the value "P000035" and "Password" with masked characters. There are links for "Forgot Password?" and "Forgot User ID?". A blue "Sign In" button is at the bottom, with a checkbox for "Enable Screen Reader Mode" below it.

**STEP 15:** On the main Delegate's page, the delegate can click on the **Student's Personal Information** tile.



**STEP 16:** Based on the access that has been granted by the student, in this example, the delegate can access the three information sections.



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**STEP 17:** View Holds.

The screenshot shows the 'View Holds' interface. The top navigation bar includes 'Delegate Access Home Page' and 'Delegate Personal Information'. Below the navigation bar, the 'Student ID' is displayed as a redacted field. The left sidebar contains three menu items: 'View Holds' (selected), 'View To Do List', and 'View Grades'. The main content area is titled 'View Holds' and shows a table with 1 row. The table has columns for 'Hold', 'Institution', and 'Department'. The data row shows 'Bacterial Meningitis' for the hold, 'UH-Downtown' for the institution, and 'Registrar' for the department.

Hold	Institution	Department
Bacterial Meningitis	UH-Downtown	Registrar

**STEP 18:** View To Do List.

The screenshot shows the 'View To Do List' interface. The top navigation bar includes 'Delegate Access Home Page' and 'Delegate Personal Information'. Below the navigation bar, the 'Student ID' is displayed as a redacted field. The left sidebar contains three menu items: 'View Holds', 'View To Do List' (selected), and 'View Grades'. The main content area is titled 'View To Do List' and displays the message 'No current tasks'.

**STEP 19:** View Grades.

The screenshot shows the 'View Grades' interface. The top navigation bar includes 'Delegate Access Home Page' and 'Delegate Personal Information'. Below the navigation bar, the 'Student ID' is displayed as a redacted field, followed by the term 'Summer 2021' and another redacted field. The left sidebar contains three menu items: 'View Holds', 'View To Do List', and 'View Grades' (selected). The main content area is titled 'View Grades' and shows two summary rows: 'Term GPA 0.000' and 'Cumulative GPA 0.000'. Below these is a table with 2 rows. The table has columns for 'Class', 'Units', 'Grading', 'Grade', and 'Grade Points'. The data rows show 'ACC 3323' and 'MIS 3302', both with 3.00 units and 'Graded' status.

Class	Units	Grading	Grade	Grade Points
ACC 3323	3.00	Graded		
MIS 3302	3.00	Graded		

**STEP 20:** If the delegate has access to multiple students' records, they can select from the students list.

The screenshot shows the 'View Grades' interface. The top navigation bar includes 'Delegate Access Home Page' and 'Delegate Personal Information'. Below the navigation bar, a dropdown menu is open, showing a redacted student ID. The left sidebar contains three menu items: 'View Holds', 'View To Do List', and 'View Grades' (selected). The main content area is currently blank, indicating that the user is in the process of selecting a student to view their grades.