

FERPA usage instructions

- What is FERPA?
 - FERPA stands for the Family Education Rights and Privacy Act, get more information [here](#).
- What is a Proxy?
 - A proxy is anyone that you deem should have access to your scholastic records.
- Where do I manage my proxy setting?
 - Proxies are managed on the FERPA Management tab in BANNER Student Online Services.
- How do I assign someone as a proxy?
 - In BANNER Student Online Services, Using the PROXY access menu (additional info below).
- How do I remove a proxy?
 - In BANNER Student Online Services, using the PROXY Access menu (additional info below).
- How long are proxies good for?
 - All proxies expire at the end of the Summer Semester. You will need to reapply the privileges to the proxy if they are to be maintained after such time.
- What is my Proxy's Username?
 - The Proxy's username is the Email Address given to the individual.
- Missing emails?
 - Email settings may send the emails sent from this process to the SPAM or Junk Folders.
- How do I advance my Proxy from year to year?
 - The start and end dates that are used to grant a Proxy access must fall between June 1, and May 31 of a given academic year. Setting the start date prior to June 1 will cause the system to update the end date to May 31 of that academic year that night. Example: For Fall 2021 to Spring 2022 the start and end date must fall between June 1, 2021, and May 31, 2022.

Additional questions, please contact the Dean of Students

- Phone: (315)866-0300 ext. 8276
- E-mail: dean_of_students@HERKIMER.EDU

Navigating to FERPA Management

1. Sign into [MyHerkimer](#)
2. Using the Student Online Services link, sign into Student Online Services.

The screenshot shows the Herkimer College Student Online Services dashboard. At the top, there is a search bar and navigation icons. Below is a banner image of students with the text "We Are Herkimer College Providing high quality, accessible educational opportunities and services." The main area contains a grid of application icons. The "Student Online Services" icon, which features the Herkimer logo, is highlighted with a red rectangular box. Other icons include Outlook, Microsoft Teams, OneDrive, My Calendar, Office 365, Generals Online, Starfish, StudentLingo, Track-IT, SUNY Online, Tutoring Appointments, Banner 9 Prod (Firefox Only), Documents and Forms, Handshake, Software Download, TaskStream, DegreeWorks, and Herkimer Edge.

3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management."
4. This will bring you to the Proxy Access Menu

The screenshot shows the Herkimer Student Online Services navigation menu. The Herkimer logo and "THE STATE UNIVERSITY OF NEW YORK STUDENT ONLINE SERVICES" are at the top. Below is a horizontal menu with tabs: Personal Information, Student Services, Faculty Services, WebTailor Administration, Faculty Term, Change, Select CRN, Student Menu, Information, Student Selection, ID, and FERPA Management. The "FERPA Management" tab is highlighted in blue. Below the menu is a search bar with a "Go" button and navigation links: RETURN TO MENU, SITE MAP, HELP, EXIT.

Proxy Access Menu

Please note, the term 'Action PIN' refers to your FERPA Password.

[Proxy Management](#)

This page allows you to add proxy access to selected Banner Web pages. Anyone with an e-mail address can be a proxy.

RELEASE: 8.9.1.3.E

Assign a new proxy

1. Sign into [MyHerkimer](#)
2. Using the Student Online Services link, sign into Student Online Services.
3. To get into the PROXY menu, click the last tab on the tab bar “FERPA Management”.
4. This will bring you to the Proxy Access Menu
5. Click on Proxy Management to bring up the Add/Edit options.
6. If a Proxy already exists, they will be listed with their name and the number of accesses granted.
7. To Add a New Proxy, click on the **Add Proxy** option



[Personal Information](#) [Student Services](#) [Financial Aid](#) [FERPA Management](#)

Search

Proxy Management

Proxy List

Expand a proxy to define relationship type, begin and end dates, and authorizations.

Your proxy list is empty.

Add a Proxy

Add a new proxy using the form below. Then edit their profile and authorization settings to enable appropriate access.

* - indicates a required field.

First Name*

Last Name*

E-mail Address*

Verify E-mail Address*

RELEASE: 8.8.0.1

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8. In the newly presented boxes:
 - a. Enter the First Name of the individual who will be the Proxy
 - b. Enter the Last Name of the individual who will be the Proxy
 - c. Enter the Email address that will be associated with the Proxy, then verify the entry.
 - d. Click the **Add Proxy** button will:
 - i. Verify the information was entered correctly If the information is verified, the entity will be added to the list of Proxies.
9. At this point the Proxy will receive an email that outlines who made them a proxy, and the Action Password\Pin to sign into the system.

Updating Proxy Privileges

1. Sign into [MyHerkimer](#)
2. Using the Student Online Services link, sign into Student Online Services.
3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".
4. This will bring you to the Proxy Access Menu
5. Click on Proxy Management to bring up the Proxy Management menu.
6. On the Proxy Management menu, select the Proxy you want to update.

Herkimer
THE STATE UNIVERSITY OF NEW YORK
STUDENT ONLINE SERVICES

Personal Information | Alumni and Friends | Advancement Officers | Student Services | Faculty Services | WebTeller Administration | Faculty Change Form | Select CRS | Student Information Menu | Student ID Selection | FERPA Management

Search

RETURN TO MENU | SITE MAP | HELP | EXIT

Proxy Management

A new proxy has been successfully added.

Proxy List

Expand a proxy to define relationship type, begin and end dates, and authorizations.

Collapse >

- Profile
- Authorization
- History
- Communication

Proxy Profile

Please select your relationship with this proxy. The list of pages available to the proxy is based on relationship type. The description field is your personal note about this proxy (dad, mom, soccer coach, company name). The passphrase can be used to determine FERPA identity for phone calls or other off-line queries by the proxy. You must communicate the passphrase to your proxy. You can control the start and end dates for proxy access below.

* - indicates a required field.

Relationship*

Description

Passphrase

Start Date (MM/DD/YYYY)*

Stop Date (MM/DD/YYYY)*

- a. You will need to select a relationship for the person.
- b. Each time the relationship field is updated the Proxy will receive an email Showing the new relationship selected.
- c. The description is optional and is for personal use. It is a way for the student to note the relationship of the proxy. (Ex: Mother, Father).
- d. The Passphrase is used by the proxy when speaking to the college.
 - i. Note: The passphrase is not sent automatically. The student needs to click on Send Passphrase.
- e. The start and end dates note the time in which the Proxy will have access to your information. Note: All relationships are removed at the end of the next spring term, regardless of the end date.

Updating Proxy Authorization

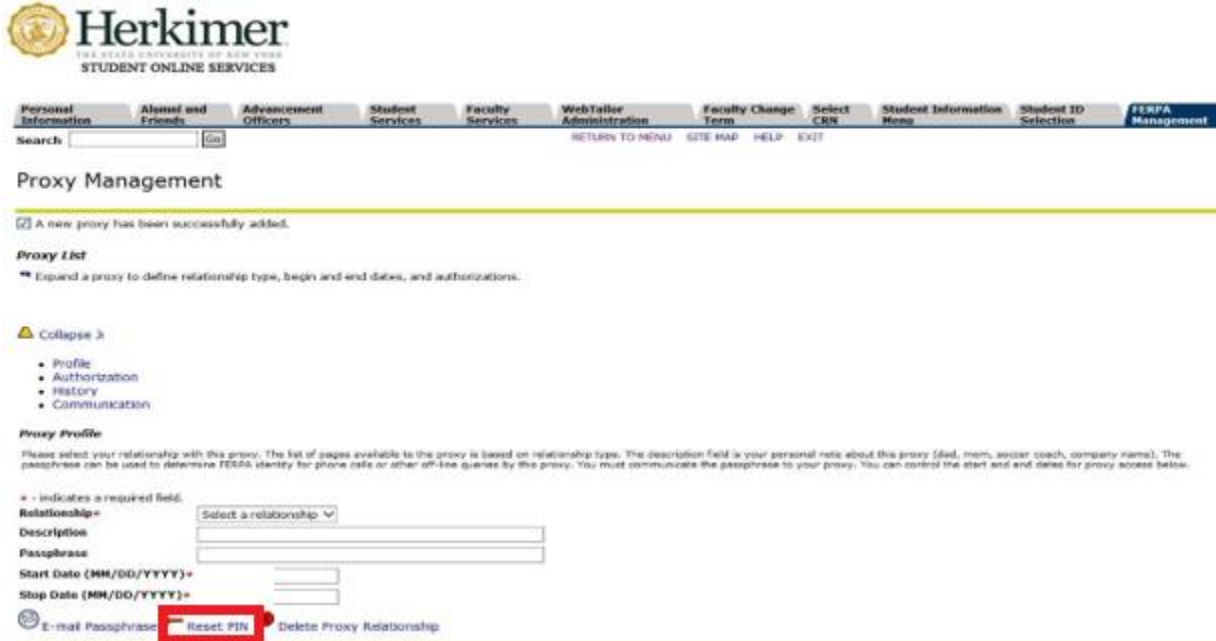
1. Sign into [MyHerkimer](#)
2. Using the Student Online Services link, sign into Student Online Services.
3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".
4. This will bring you to the Proxy Access Menu
5. Click on Proxy Management to bring up the Proxy Management menu.
6. On the Proxy Management Menu, select the Proxy you want to update.
7. There are four options to choose from

The screenshot displays the Herkimer Student Online Services interface. At the top, there is a navigation bar with tabs for Personal Information, Alumni and Friends, Advancement Officers, Student Services, Faculty Services, WebTeller Administration, Faculty Change Term, Select CRN, Student Information Menu, Student ID Selection, and FERPA Management. Below the navigation bar is a search field and a Go button. The main content area is titled "Proxy Management" and features a green success message: "A new proxy has been successfully added." Below this is a "Proxy List" section with a note: "Expand a proxy to define relationship type, begin and end dates, and authorizations." A "Collapse" button is visible. A red box highlights a menu with four options: Profile, Authorization, History, and Communication. Below this is the "Proxy Profile" section, which includes a description of the proxy and a list of fields: Relationship (a dropdown menu), Description, Password, Start Date (MM/DD/YYYY), and Stop Date (MM/DD/YYYY). At the bottom of the form are buttons for "E-mail Password", "Reset PIN", and "Delete Proxy Relationship".

- a. Profile - update relationship and passphrases
- b. Authorization - Determine access
- c. History - Show changes
- d. Communication - Email communication history

Resetting Proxy's Pin

1. Sign into [MyHerkimer](#)
2. Using the Student Online Services link, sign into Student Online Services.
3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".
4. This will bring you to the Proxy Access Menu
5. Click on Proxy Management to bring up the Proxy Management menu.
6. On the Proxy Management menu, select the Proxy you wish to update.
7. Click reset the proxy's pin to send a new system generated password to the proxy.



The screenshot shows the Herkimer Student Online Services interface. At the top, there is a navigation bar with tabs for Personal Information, Alumni and Friends, Advancement Officers, Student Services, Faculty Services, WebTeller Administration, Faculty Change Term, Select CRN, Student Information Menu, Student ID Selection, and FERPA Management. Below the navigation bar is a search field and a "Go" button. The main content area is titled "Proxy Management" and features a yellow banner stating "A new proxy has been successfully added." Below this, there is a "Proxy List" section with a note: "Expand a proxy to define relationship type, begin and end dates, and authorizations." A "Collapse" button is visible. Underneath, there is a "Proxy Profile" section with a note: "Please select your relationship with this proxy. The list of pages available to the proxy is based on relationship type. The description field is your personal note about this proxy (dad, mom, soccer coach, company name). The passphrase can be used to determine FERPA identity for phone calls or other off-line queries by the proxy. You must communicate the passphrase to your proxy. You can control the start and end dates for proxy access below." The form includes fields for Relationship (a dropdown menu), Description, Passphrase, Start Date (MM/DD/YYYY), and Stop Date (MM/DD/YYYY). At the bottom of the form, there are three buttons: "E-mail Passphrase", "Reset PIN" (highlighted with a red box), and "Delete Proxy Relationship".

Removing a Proxy

1. Sign into [MyHerkimer](#)
2. Using the Student Online Services link, sign into Student Online Services.
3. To get into the PROXY menu, click the last tab on the tab bar "FERPA Management".
4. This will bring you to the Proxy Access Menu
5. Click on Proxy Management to bring up the Proxy Management menu.
6. On the Proxy Management menu, select the Proxy you wish to update.
7. Click Delete Proxy Relationship.

The screenshot shows the MyHerkimer Student Online Services interface. At the top, there is a navigation bar with tabs for Personal Information, Alumni and Friends, Advancement Officers, Student Services, Faculty Services, WebTeller Administration, Faculty Change Term, Select CRN, Student Information Menu, Student ID Selection, and FERPA Management. Below the navigation bar is a search field and a Go button. The main content area is titled "Proxy Management" and displays a message: "A new proxy has been successfully added." Below this is a "Proxy List" section with a note: "Expand a proxy to define relationship type, begin and end dates, and authorizations." There is a "Collapse" button and a list of menu items: Profile, Authorization, History, and Communication. The "Proxy Profile" section contains a description of the proxy and a list of fields: Relationship (a dropdown menu), Description, Password, Start Date (MM/DD/YYYY), and Stop Date (MM/DD/YYYY). At the bottom of the proxy profile, there are buttons for "E-mail Password", "Reset PIN", and "Delete Proxy Relationship". The "Delete Proxy Relationship" button is highlighted with a red box.

8. Before removing the Proxy, the system will verify the request
 - a. Clicking OK will delete the proxy from the account.
 - b. Clicking Cancel will close the window without performing any action.