Review Shared Information – Delegated Access (Staff)

This guide will cover:

- Viewing proxy information for all proxies with delegated access to the student’s data
- Viewing the current transactions that are delegated to each proxy
- Viewing each transaction status

Step One

Navigate to the following breadcrumb:

Step Two

Enter in the search criteria to locate your student then click Search. Leave fields blank for a list of all values.

- **ID:** Catalyst ID of the student.
  
  ***If you do not know the Catalyst ID, use the look up icon and enter in the student’s M#. The system will provide you with their Catalyst ID.***

- **Campus ID:** Student’s M#
Step Three

Review Shared Information - Summary

<table>
<thead>
<tr>
<th>Contact</th>
<th>Contact Email Address</th>
<th>Relationship</th>
<th>Contact Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Fletcher</td>
<td><a href="mailto:jfletcher@yahoo.com">jfletcher@yahoo.com</a></td>
<td>Father</td>
<td>Accepted</td>
</tr>
<tr>
<td>Susan Smith</td>
<td><a href="mailto:ssmith@yahoo.com">ssmith@yahoo.com</a></td>
<td>Mother</td>
<td>Unknown</td>
</tr>
</tbody>
</table>

**Contact Status** indicates whether the parent/guest has accepted to decline the terms and conditions for a specific student.

- **Unknown**: Indicates that it is not known whether the parent/guest has accepted or declined the terms and conditions page.
- **Accepted**: Indicates the parent/guest has accepted the terms and conditions.
- **Declined**: Indicates the parent/guest has declined the terms and conditions.

**IMPORTANT NOTE:** The Review Shared Information - Summary page gives you a view of the same delegation information a delegator sees in the Share My Information– Summary Page in student self-service.
Step Four

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<tr>
<th>Shared Transactions</th>
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<th>Transaction Status</th>
</tr>
</thead>
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<td>Submitted</td>
</tr>
<tr>
<td>Emergency Contacts</td>
<td>15/04/2013</td>
<td>Access Granted</td>
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Transaction Status indicates the progress of each delegation transaction from the time the student delegates the transaction to the time the access is revoked.

- **Submitted**: Indicates the transaction has been delegated to the parent/guest, but the guest has not yet accepted their terms and conditions.

- **Access Granted**: Indicates the parent/guest has accepted their terms and conditions and can now access the student’s data.

- **Revoked**: Indicates if the parent/guest has declined the terms and conditions or the student has revoked their access to the transaction.

- **Pending**: Indicates the transaction has been delegated to the parent/guest, but is pending acceptance to the terms and conditions.
Step Five

Shared Transactions:
Below is a list of all possible transactions a student may delegate to a parent/guest.

- Financial Aid Awards
- View 1098T
- View Account Activity
- View Account Summary
- View Bill
- View Charges Due/Make a payment
- View Grades
- View Health Insurance Waiver
- View Holds
- View Payment History
- View Pending Financial Aid
- View Schedule
- View To Dos

You have now completed the steps of reviewing shared information