Delegated Access

Delegated Access is a functionality in PeopleSoft Campus Solutions that allows a student to authorize another person such as a parent to be a representative to perform a certain task. The student may authorize that person to execute a transaction on their behalf by delegating access. For example, a student could allow a parent to view their personal and academic information or make a payment on behalf of the student. If the parent previously did not have access to PeopleSoft, the student could invite the parent to register and create a user account in order to access the system.

What is this new feature?

Delegated Access is a feature that allows a student to authorize a person to view student information or perform transactions on behalf of the students. For example, a student may allow a parent to view grades or to make a payment on tuition that is due.

Why did I get it?

This feature is being rolled out to help students share information with family or friends and to also simplify the tuition payment if the students would like another person to make that payment.

What is the point of it if folks can see my tasks, but not help me complete them?

Some information would be better controlled by the students themselves to preserve data integrity and security that the students will need to maintain.
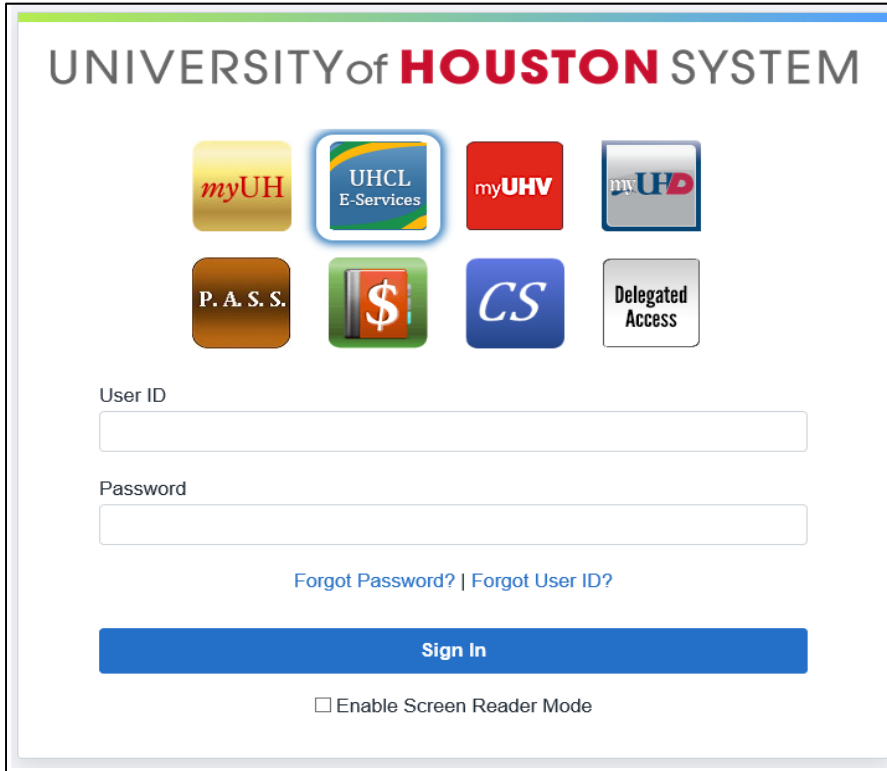
How long does this Delegated Access last?

The access will last until the student revokes the access that has been granted to a delegate.

Do I need to update this each semester?

No, it does not need to be updated each semester, but we do recommend that students periodically review the access that they have granted to delegates.

Granting Access

1. Student logs in to Student Self-Service.

2. Student clicks on the Share My Information tile to navigate the Share My Information page.
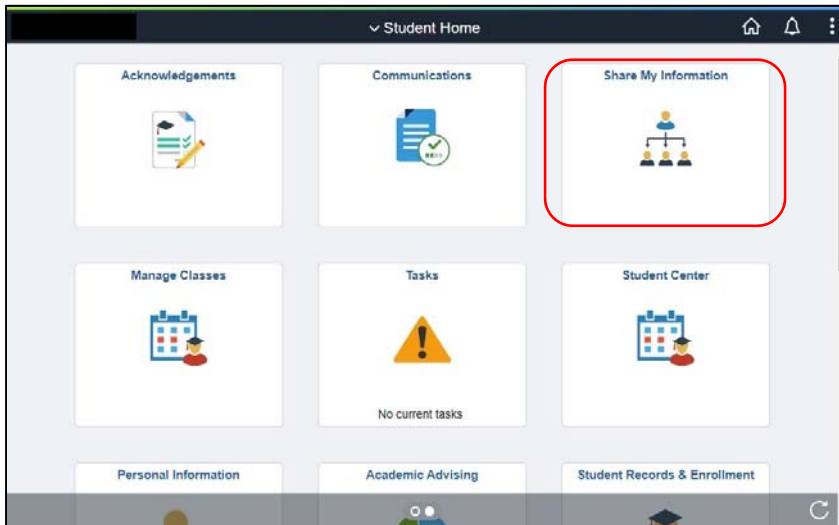
3. Student clicks on the Delegate Access To A New Contact button.

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.

5. Student clicks on the Send PIN to Email button.

6. Student receives email for the PIN.

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

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.

9. Student receives and email acknowledgment that contains a key to be used by the delegate.

Access to some of your school data for University of Houston-Downtown has bee...

noreply@central.uh.edu
To ☐☐☐☐☐@uh.edu

↩ Reply   ↩ Reply All   → Forward   ···

Sun 8/8/2021 6:45 PM

UNIVERSITY of **HOUSTON** SYSTEM

☐☐☐☐

Delegate access has been granted to Steve Rogers (Friend) in your self-service account to view or update the following information for University of Houston-Downtown:

- View Grades
- View Holds
- View To Do List

In order for your Delegate to create an account, you must provide them with the security key below. The security key will expire after 48 hours. After the key expires, you must log into your self-service account and reset the security key.

Security Key: 0f8ZZ8W
Institution:☐☐☐☐☐☐☐☐☐☐

If you did not authorize the Delegate access, please contact UHS Information Security at security@uh.edu or 832-842-4695. To remove or make changes to the Delegate access, please sign-in to your self-service account and select the Share My Information tile.

You are solely responsible for the actions taken on your behalf by the designated person.

This is an auto generated email; please do not respond to this message.

This is an official message sent by the University of Houston System. To verify the validity of this message, email security@uh.edu.

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

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

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

Steve Rogers

Delegated Access Completion
_____

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.

OK

13. In addition, the delegate receives a confirmation email that contains the userID assigned to the delegate to be used for logging in.

← **Delegate Access Account Confirmation**

S   sa92tst@central.uh.edu
     Sun 8/8/2021 11:50 PM
     To: You

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 ▮▮▮▮@outlook.com.

Name: Steve Rogers
Accepted Date: 2021-08-08
Institution: ▮▮▮▮▮▮▮▮▮▮▮▮▮▮▮
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. Departmen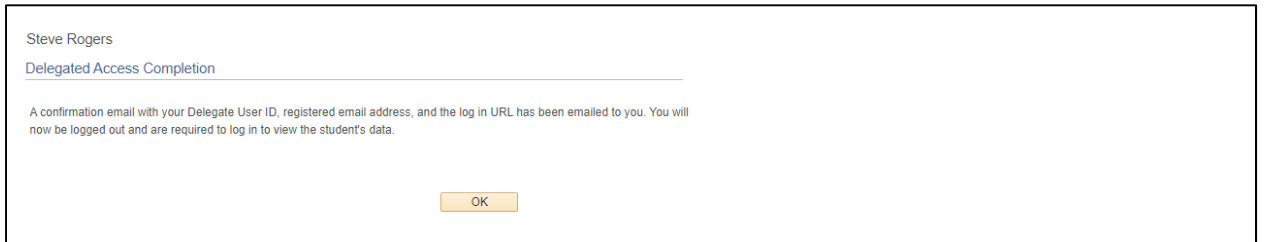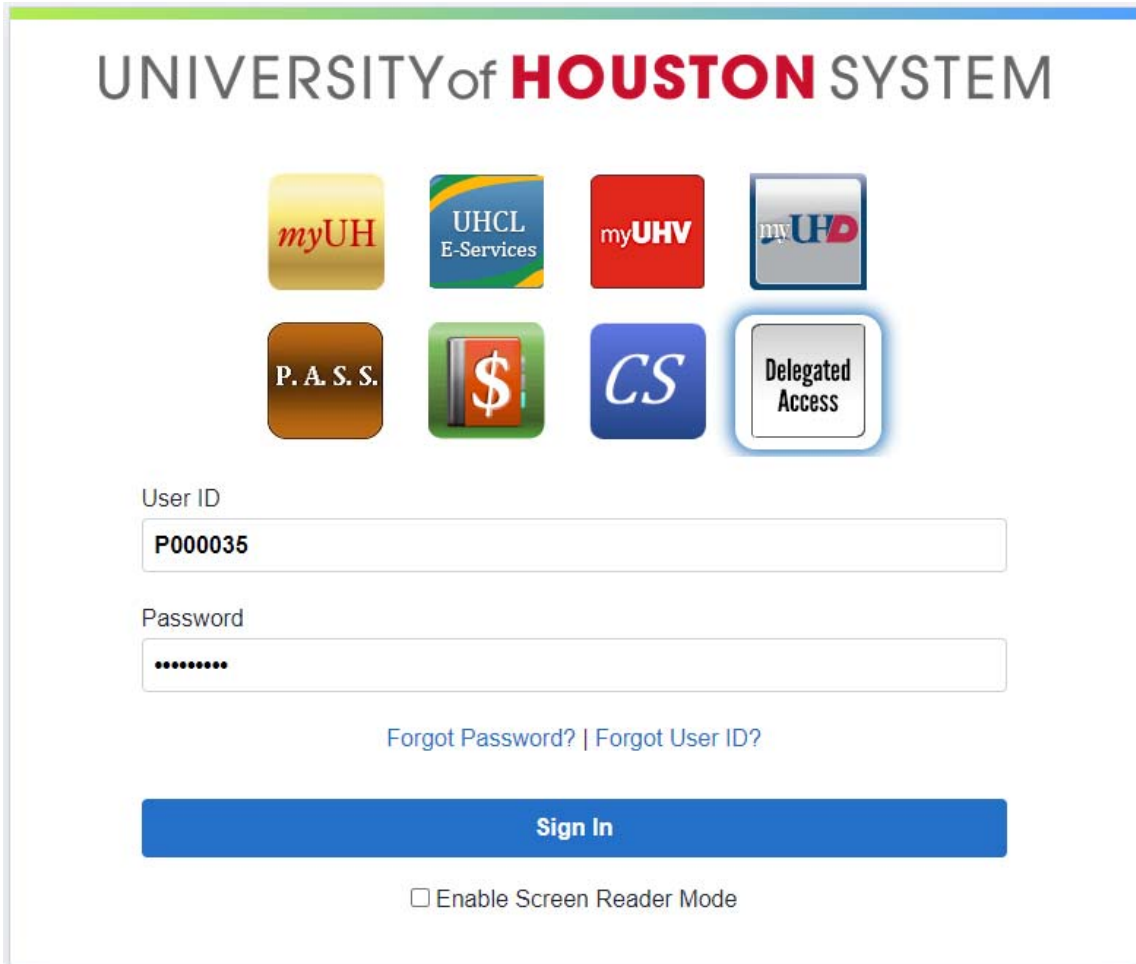t of Education (Department). 20 U.S.C. Section 1232g; 34 CFR Part 99. Once a student reaches 18 years of age or attends a postsecondary institution, he or she becomes an "eligible student," and all rights formerly given to parents under FERPA transfer to the student. The eligible student has the right 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

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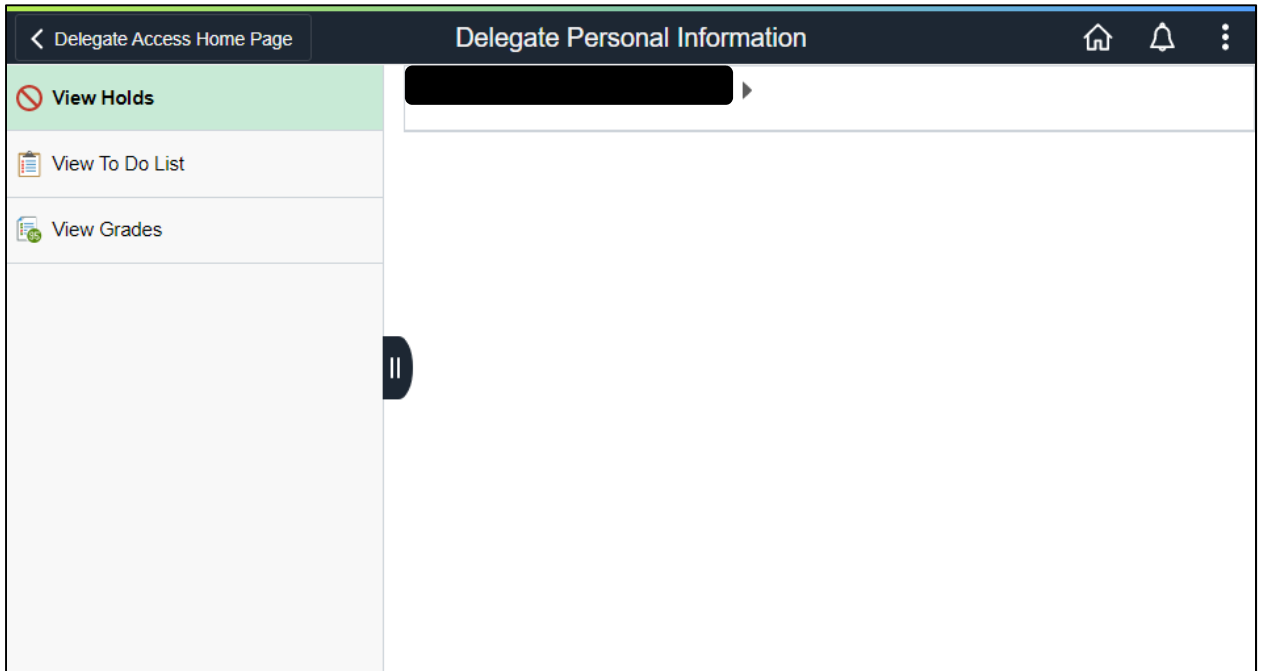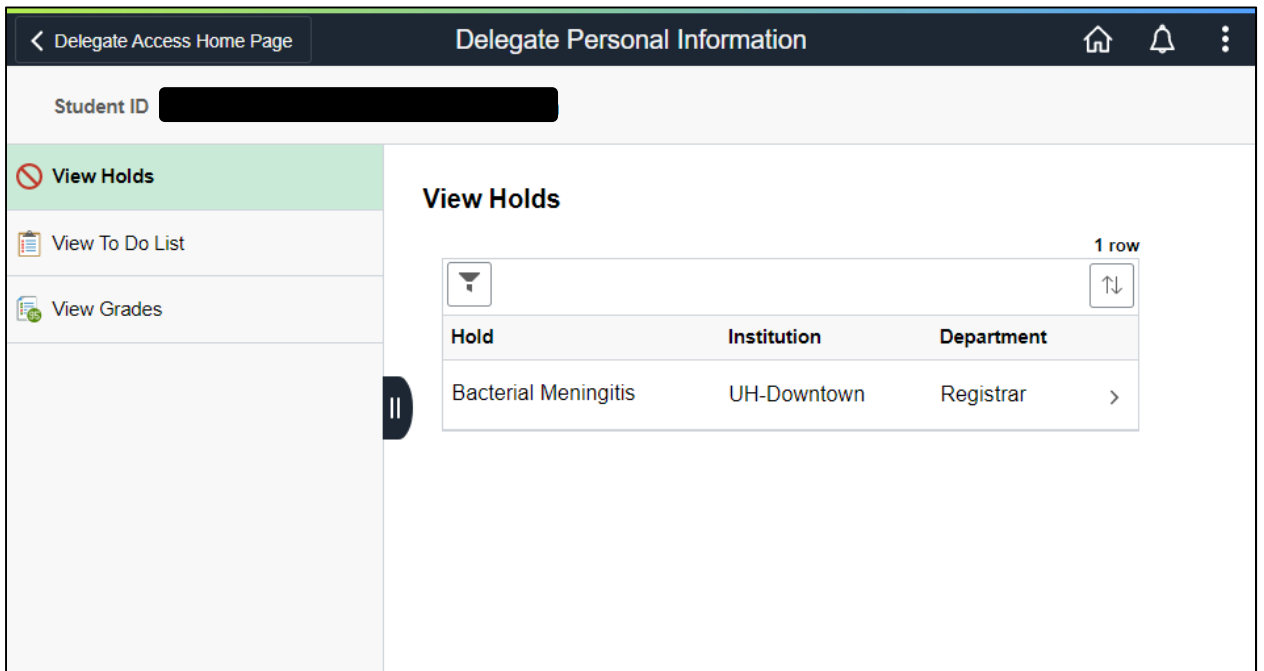

15. On the main Delegate's page, the delegate can click on the Student's Personal Information tile.
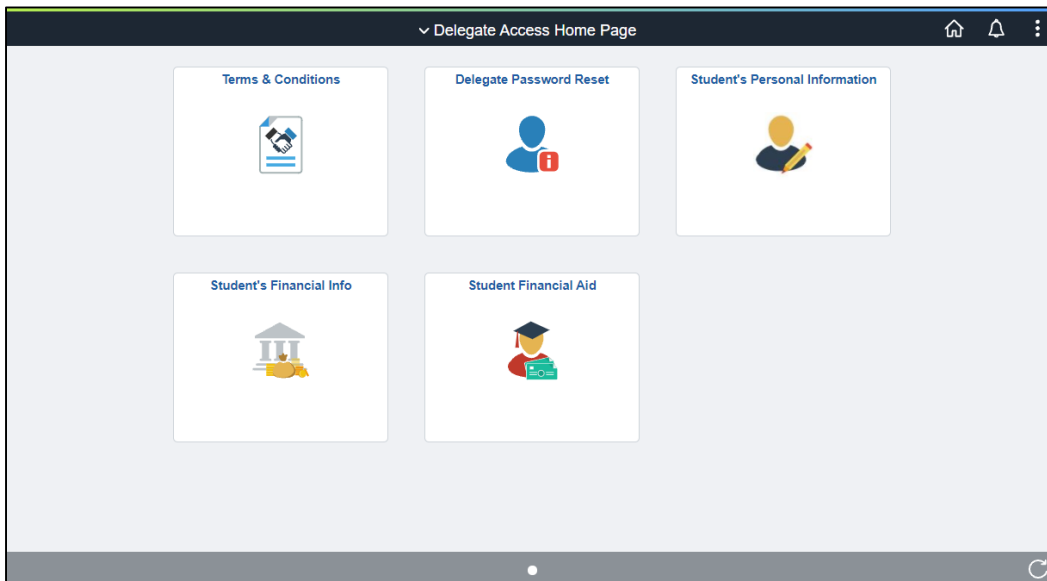
16. Based on the access that has been granted by the student, in this example, the delegate can access the three information below.

17. View Holds.

18. View To Do List

19. View Grades.

20. If the delegate has access to multiple students' records, they can select from the students list.
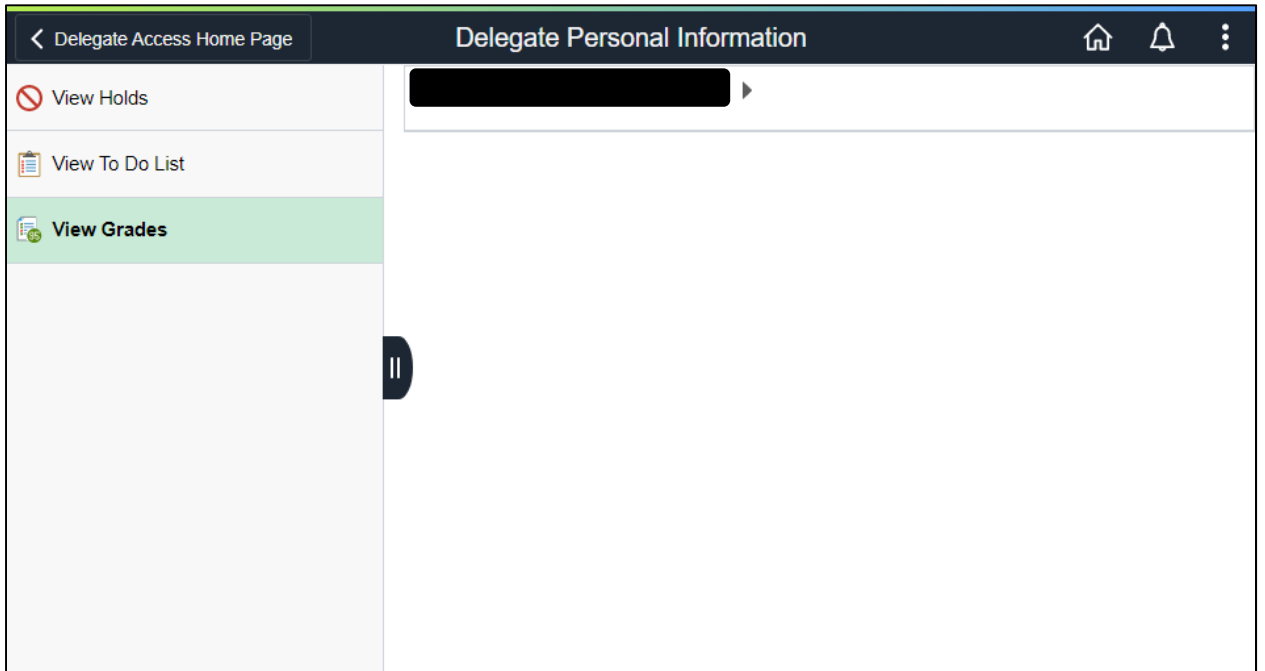
Revoking Delegates' Access

1. Students can revoke a delegate's access by going to the same Student Self-Service page where they granted the access.
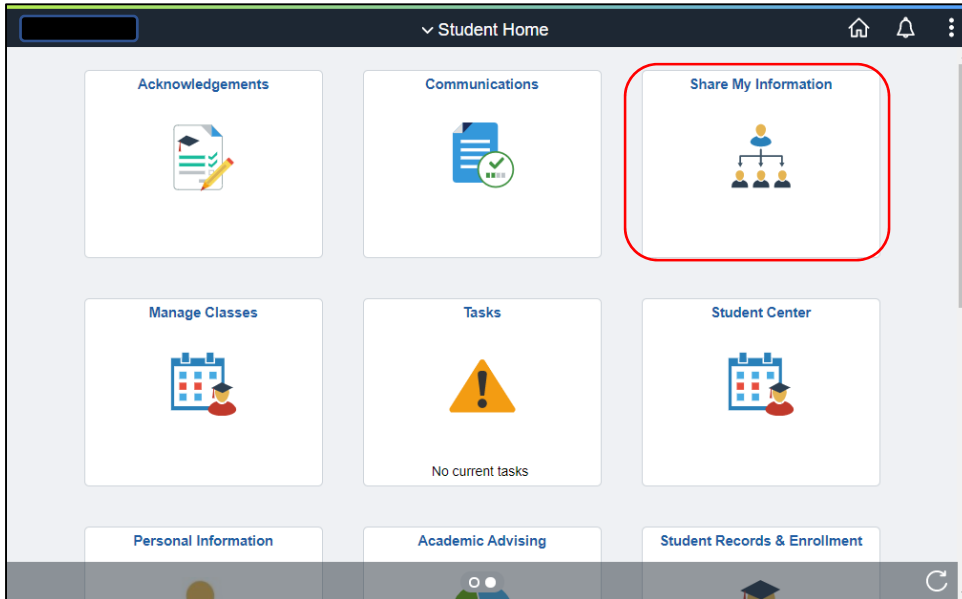
2. To revoke certain access from a delegate, the student clicks on the "Edit" button.
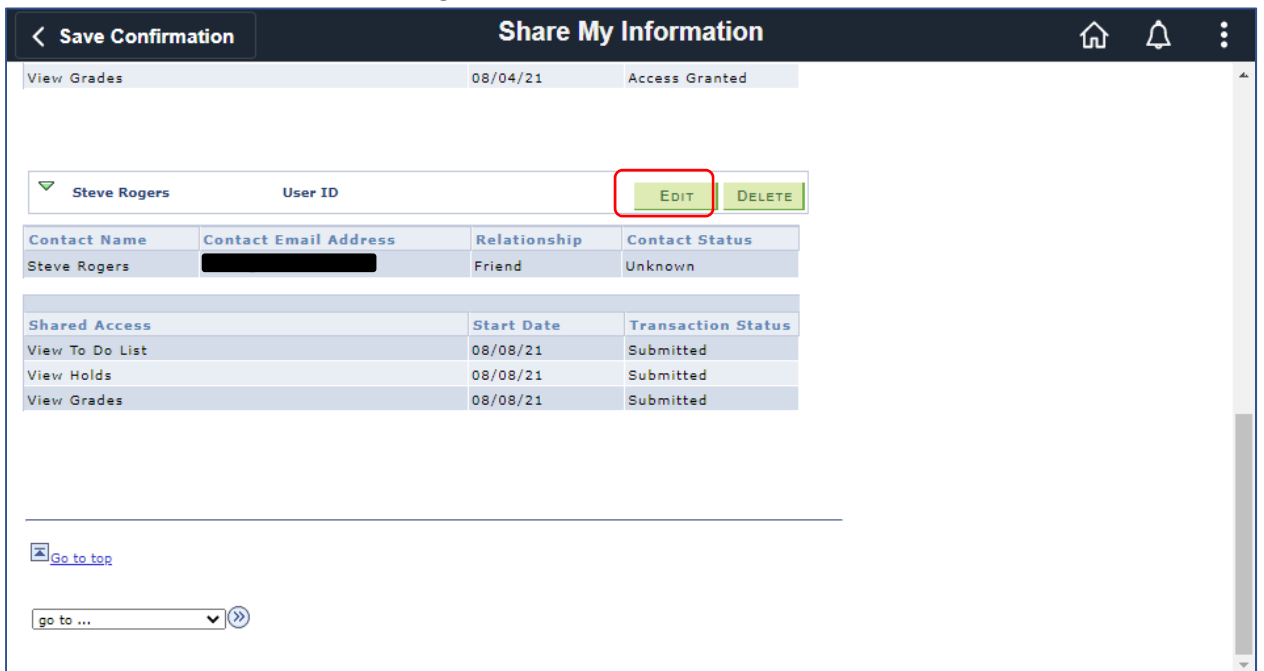
3. After unchecking the ones that the student would like to revoke, similar to granting access, the student will digitally sign the revocation, accept the terms and conditions, and then click on the Save button.

4. To remove access entirely from a delegate the student clicks on the Delete button on the page Share My Information page.

5. The student will then confirm the access deletion as shown below.

Student Home   **Delete Confirmation**

Delete Confirmation

?   Are you sure you want to delete Steve Rogers?

Yes - Delete   No - Do Not Delete

Making a Payment

1. The delegate will click on the delegated Access tile using their login.
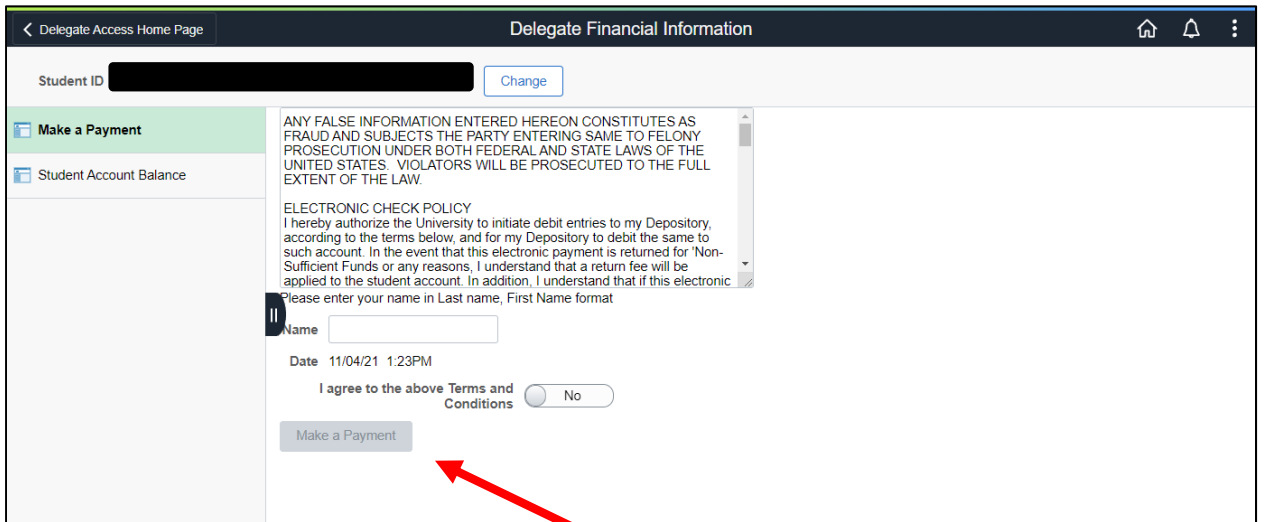

2. The delegate will click on the Student's Financial Info tile.

3. The delegate will click on the student's name.
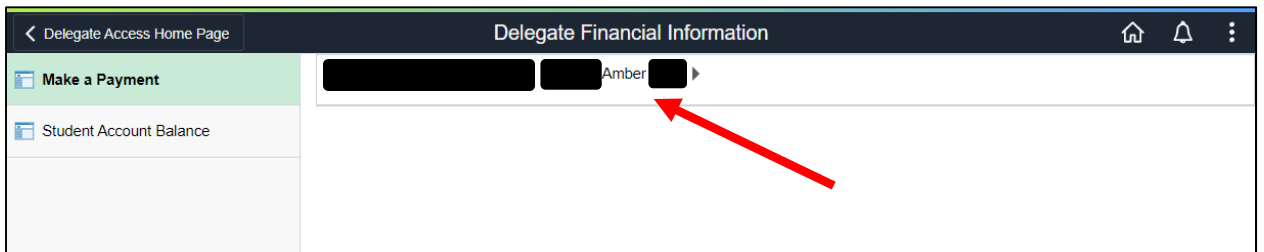
4. The delegate will fill out the digital signature box, agree to the terms and conditions, and then click on **Make a Payment.** Please note, if the delegate has access to more than one student, the delegate can click **Change** to choose another student.

5. Next, the delegate will fill in the payment amount, check the box to accept the terms and conditions, then click **Submit** button.

6. Then, enter payment information and click **Continue.**

7. Verify all information is correct and then click **Confirm.**

8. The delegate will see the payment confirmation information for their records.

Reviewing Financial Aid

1. The delegate will click on the delegated Access tile using their login.
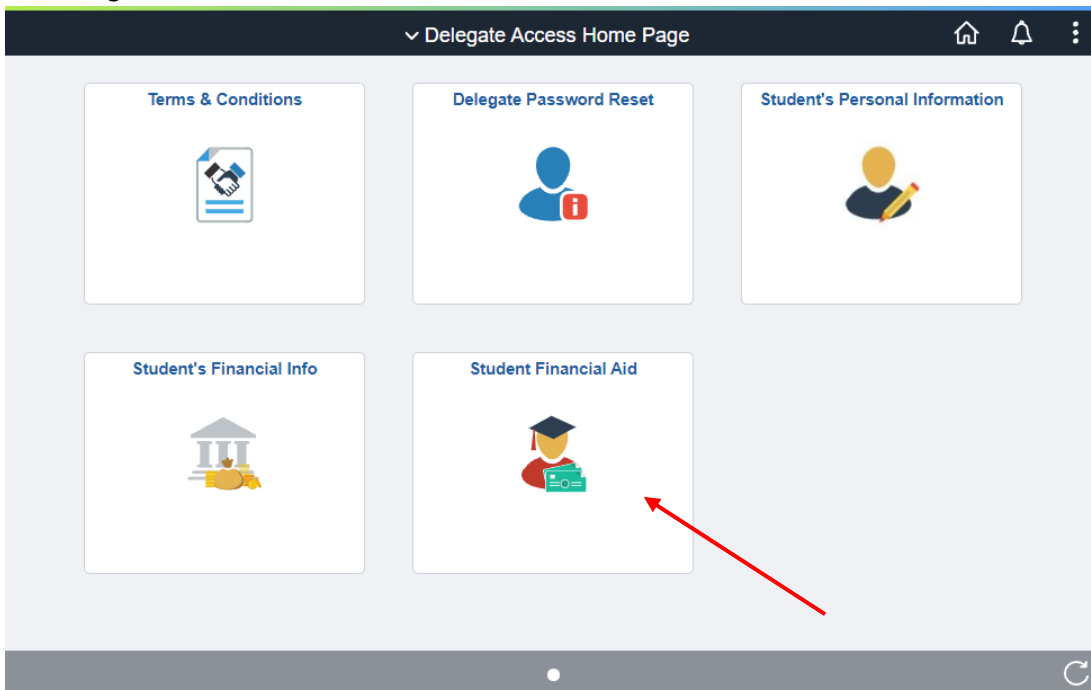
2. The delegate will click on the Student Financial Aid tile.

3. If the delegate has access to only one student, the Financial Aid information for that student will be displayed by default. To select a different aid year, the delegate will click on the **Change** button. In addition, if the delegate has access to multiple student records, a different student can also be selected by clicking on the **Change** button. To view the award summary by semester, the semester can be selected from the drop down menu.

4. College Financing Plan can be viewed by clicking on the College Financing Plan button. A separate tab that contains the College Financing Plan will open.

5. A sample of the College Financing Plan is shown below.

Undergraduate College Financing Plan

Total Cost of Attendance 2021-2022

	On Campus Residence	Off Campus Residence
Tuition and fees	$6,032	
Housing and meals		$9,682
Books and supplies	$1,038	
Transportation	$1,812	
Other education costs	$5,854	
Estimated Cost of Attendance		**$24,418 / yr**

Expected Family Contribution

Based on FAFSA As calculated by the institution using information reported on the FAFSA or to your institution.	$915 / yr
Based on Institutional Methodology Used by most private institutions in addition to FAFSA.	$0 / yr

Scholarship and Grant Options
Scholarships and Grants are considered "Gift" aid - no repayment is needed.

Scholarships		Grants	
Merit-Based Scholarships		Need-Based Grant Aid	
Scholarships from your school	$0	Federal Pell Grants	$4,159
Scholarships from your state	$0	Institutional Grants	$2,000
Other scholarships	$0	State Grants	$0
Employer Paid Tuition Benefits	$0	Other forms of grant aid	$1,000
Total Scholarships	**$0 / yr**	**Total Grants**	**$7,159 / yr**

College Costs You Will Be Required to Pay

Net Price (Cost of attendance minus total grants and scholarships)	**$17,259 / yr**

Loan and Work Options to Pay the Net Price to You
You must repay loans, plus interest and fees.

Loan Options*		Work Options	
Federal Direct Subsidized Loan (2.75% interest rate)(0% origination fee)	$0 / yr	Work-study Hours Per Week (estimated)	$0 / yr 20 / wk
Federal Direct Unsubsidized Loan (2.75% interest rate)(0% origination fee)	$0 / yr	Other Campus Job	$0 / yr
Private Loan (check with your lender on interest and fees)	$0 / yr	**Total Work**	**$0 / yr**
Institutional Loan (0% interest rate)(0% origination fee)	$0 / yr		
Parents may also apply for the following:			
Parent Plus Federal Loan (5.3% interest rate)(0% origination fee)	$0 / yr		
Total Loan Options	**$0 / yr**		

For More Information

University of Houston-Clear Lake
Office of Student Financial Aid
2700 Bay Area Blvd.
Houston, TX 77058
Telephone: 281-283-2400
E-mail: uhcl_fao@uhcl.edu

* For federal student loans, origination fees are deducted from loan proceeds.

Other Options	
Income Share Agreement (0% of income for 0 months)	$0 / yr

Education Tax Benefits

- **American Opportunity Tax Credit (AOTC):** Parents or students may qualify to receive up to $2,500 by claiming the American

6. To view the annual Cost of Attendance estimate, the delegate will click on the menu navigation as shown below. To view the cost estimate by semester, the semester can be selected from the drop down menu.