# Proxy Setup Instructions for Students

What is a Proxy?

Students can give parents, legal guardians, or other trusted parties access to view certain pieces of their student information online. This access is referred to as proxy access, and the person who is granted this authorization is called a proxy. The student manages the entire process through Oasis.

A proxy can only see the information they have been authorized to view. Proxy access must be re-authorized every semester and both the student and designated proxy will receive an email notification when re-authorization is required. When proxy access is changed, the designated proxy is notified by email of the change. All messages regarding proxy access will come from helpdesk@Oglethorpe.edu, oasis-no-reply@Oglethorpe.edu, or ITS@Oglethorpe.edu.

Where to find the Proxy Access page:

1. Log into Oasis (https://oasis.oglethorpe.edu).
2. Clink on your username in the upper right corner to view the drop-down menu below.
3. Click on the "View/Add Proxy Access" link. Please read all information on the View/Add page carefully, the information here will be updated with any announcements pertaining to proxy access.
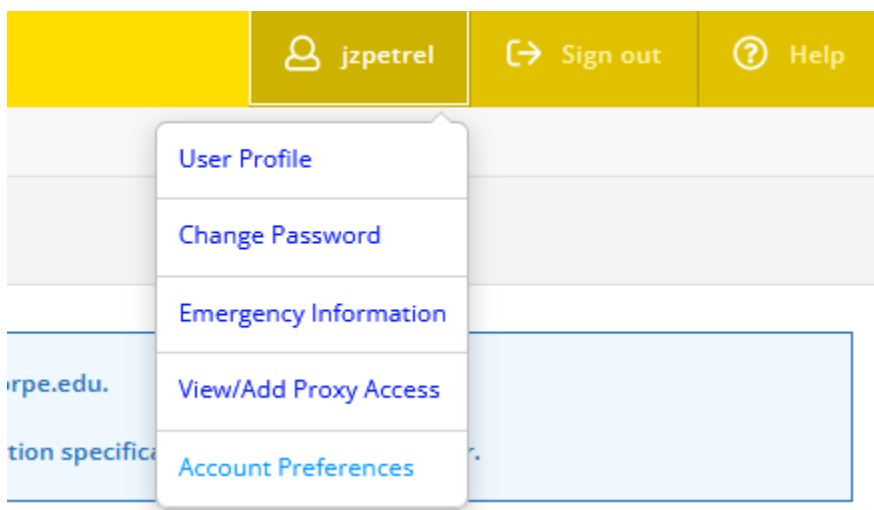
How to Add a Proxy

1. Log into Oasis and Click on the link "View/Add Proxy Access".

2. Scroll down to the "Add a Proxy" section.
3. Click on the drop-down menu labeled "Select a Proxy". Anyone who currently is in the database and connected to your record should already be listed.
   - If you see the person that you would like to add as a proxy, click to highlight their name. It will show their email address and their relationship to you (as listed in the database at that moment).
   - If you do not see the person that you want to add, select "Add Another User" from the drop-down menu.

Add a Proxy

<div>
i   To add a Proxy select their name from the list below, if their name does not appear select "Add Another User". When adding someone, you will be required to enter the person's name, email address and birthday. Please enter all information as accurately as possible, inaccurate information may significantly delay processing.
</div>

Select a Proxy

Add Another User ▾

4. Next, enter their First Name, Last Name, Birthdate and Email Address in the appropriate boxes. It is very important to add this information as accurately as possible; it will affect the given proxy's ability to access the account that will be created for them.

Select a Proxy

Add Another User

Prefix	First Name *
Please Select	Jane

Middle Name	Last Name *
Middle Name	ZPetrel

Suffix	Former Last Name
Please Select	Former Last Name

Email Address *	Confirm Email Address *
jzpetrel1@Oglethorpe.edu	jzpetrel1@Oglethorpe.edu

5. From the "Relationship" drop down menu, select the most accurate option that describes how you know the person you are designated as your proxy.

6. Under Access, you can grant complete access or restrict their access to only particular areas. If you are unsure of exactly what the option includes, they all correspond to a section/page in the Oasis accessible from the left side menu. We recommend checking each page before you grant access to verify what information is included.

Relationship *

Parent ⌄

Access *

◯ Allow Complete Access

🔵 Allow Select Access

☐ **Financial Aid** ⓘ

☐ Offer Letter

☐ Financial Aid Home

☐ FA Outside Awards

☐ FA Required Documents

☐ College Financing Plan

☐ **Academics** ⓘ

☐ Grades

7. Please read the entire disclosure agreement. If you agree to the disclosure agreement, then check the box next to "I authorize Oglethorpe University to disclose my information to this party." If you do not fully agree, please do not proceed further.

8. Click "Submit". You will be asked to enter your password again to confirm.

9. If you added another user, a database search will be performed, and a pop-up window will notify you if a match was found for that user. Click "Continue".

   ➢ If a possible match is found, the Help Desk will be notified and the information you provided will be reviewed within two business days. For potential matches, someone may contact you by email from IT Services for additional information.

10. Your proxy will then receive an email notice that they have been granted access to your account. If they are newly added, they will also receive emails containing their username and password.

How to Remove or Change Existing Proxy Access

1. Log into Oasis and Click on the link "View/Add Proxy Access".
2. Scroll down to the "Active Proxies" section.
3. Find the name of the proxy whose access you want to change or remove.
4. Click on the pencil icon to the right of their name and a new window will open.

Active Proxies				
Name	**Proxy Access**	**Relationship**	**Effective Date**	
Jane Zpetrel	Student Finance	Parent	4/9/2018	→ ⓘ

5. To remove altheir access select "Remove All Access" from the list and click "Save".   Otherwise, select the access you want them to have and click "save".
   - ➢ Any time you save the "Edit Proxy Details" window, your proxy will receive email that their access has changed.

Edit Proxy Details

Name Jane Zpetrel

Email Address   **Relationship**

jzpetrel1@Oglethorpe.edu   Parent

Access

⦿ Allow Complete Access

◯ Allow Select Access

◯ Remove All Access

Student Finance ⓘ	Select All ☑
Account Activity	☑
Account Summary	☑
Make a Payment	☑

Cancel	Save