Proxy Access

Introduction

Students can allow their parents, guardians, or others access to elements of their student record through myHeliotrope by granting them Proxy Access. Those who are given proxy access will be permitted to view information in the student account by accessing myHeliotrope through their personal e-mail address. Students can control which parts of their records will be visible to each proxy account and can update, manage, or remove proxy access at any time. The first section of this guide is for students who want to set up or manage proxy access. The second section is for proxies who want to know how to activate their proxy account and view information.

For Students

Getting Started with Proxy Access

1. Log in to the Purchase Portal at my.purchase.edu.
2. Click on myHeliotrope.
3. Click on Proxy Access.
4. Click on Proxy Management.

Any existing proxies will be listed here. To add a new proxy click Add Proxy.
Proxy Access

Enter the name and e-mail address of the person you are granting proxy access to. An e-mail will be sent to the proxy’s provided e-mail address asking them to activate the proxy account.

Once you add the proxy, you can manage their information and the access you want them to have by clicking on “Expand [Name of Proxy].”

You will see four categories expand: Profile, Authorization, History, and Communication.
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Proxy Profile

To set up your proxy’s profile, click **Profile**. Fill in as much of this information as possible.

**Relationship**: Select your proxy’s relationship to you (e.g., Parent or Legal Guardian).
**Description**: Use this field to specify your proxy’s relationship to you (e.g., Mother).
**Start Date**: Enter the date your proxy may begin accessing the information you are authorizing.
**Stop Date**: Enter the date after which your proxy should no longer have access.

You may also reset your proxy’s pin or delete the proxy relationship from this section. If you delete a proxy relationship, you will need to recreate it if you ever want to grant this proxy access at a later date. It is recommended that you use stop date to temporarily suspend the proxy’s access, rather than deleting the proxy relationship.

Any information you update in this session will be confirmed below the profile fields and options.
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Proxy Authorization

The Page Authorization section is where you can select the specific types of information your proxy can view. To get there, click Authorization and scroll down. You can click Proxy Parent Options to select all recommended areas of access. Click the page links to view the specific pages you are granting access to by clicking the box. This authorization can be updated or removed at any time.

If you want to grant an identical set to another proxy, select the additional proxy from the dropdown menu under Copy Authorizations. The proxy account must already be created to do this.

You can e-mail the list of authorized pages to your proxy by clicking E-mail Authorizations.

Proxy History

The Authorization Log shows when your proxy accessed your records and which pages they viewed. It also shows when you enable or disable access to particular pages. You may access this by clicking History and scrolling down.
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Proxy Communication

The Communication Log is the record of e-mails that were sent to the proxy and what information they contained. This also shows when the proxy activated their account. You can access this by clicking Communication and scrolling down. You can resend any of the communications by clicking the e-mail icon under the Resend column.

For Proxies

Introduction

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Activating a Proxy Account

When a student adds you as a proxy, you will receive an e-mail with the subject “New proxy identity” containing an account activation link and a PIN. Follow the activation link and enter your e-mail address the PIN you have been provided.
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On the next page, enter your e-mail address. In the Old PIN field, re-enter the PIN from the activation e-mail. In the Enter New PIN field, enter a new, unique numeric PIN of your choosing, 6-15 characters long. Re-enter this new PIN in the Validate PIN field.

After you have established your PIN, you are ready to use your Proxy Access account.

Using Proxy Access

You can login to the Proxy Access System at any time by going to www.purchase.edu/parents and clicking the Parent Proxy Access link in the left sidebar menu.

After logging in for the first time, you will be prompted to complete some profile information. Complete this information to the best of your ability. Required fields are marked with red asterisks.
Proxy Access

You can access the pages the student has authorized you to view by clicking on the name of the student at the top of your profile and scrolling down. You may click on any of the pages under **Proxy Authorizations** to view the information. The page will open in a new window or tab.
Proxy Access

Proxy Authorizations

The following Banner Web page links have been specified.
We appreciate your effort to be a good parent.

Proxy Parent Options for Blamey Stone
- Class Schedule
- Final Grade
- Account Summary
- Account Summary by Term
- Account Detail for Term
- Statement and Payment History
- Purchase College Payment Center