PROXY PORTAL – How-To Guide for Proxies

Proxy Portal allows Sam Houston State University students to grant parents, guardians, coaches, or potential employers’ access to specific parts of their records online, pertaining to financial aid and/or registration. Anyone granted access to view a student’s information online is referred to as a proxy. Once a proxy has been granted access, they will need to set up an account to access the information granted by the student. When setting up a proxy, the student will designate a window of dates the proxy has access. This window can be edited by the student at any time.

Creating a proxy account is done through a series of emails sent to the email account the student provides when creating a proxy.

Note:
- Emails indicating you have been established as a proxy do not have a set order of delivery.
- It may take a few minutes before receiving emails once you have been set as a proxy.
- If you cannot find the email, check your junk folder.
- If you are unable to locate the email or if the link does not work, your student will need to designate a different email address for you to use.

Setting up account:

1. Check your email account and follow provided instructions:
   a. One email will be titled Sam Houston Proxy Confirmation – Initial Password and have a code to use in the one-time use link from the Confirm New Sam Houston Proxy Identity email.
   b. One email will be titled Confirm New Sam Houston Proxy Identity and will have a one-time link to be used with the code from the Sam Houston Proxy Confirmation- Initial Password email.
   c. One email will be titled Sam Houston Proxy Relationship Information and will state what type of proxy you have been granted as well as the permanent link to access the student’s information after setting up your account.
      i. *It is recommended that you save this link for future use.*
2. Click the one-time authorization link from the Confirm New Sam Houston Proxy Identity email and input code provided in the Sam Houston Proxy Confirmation – Initial Password email.

3. Input necessary information.
4. Log into the system with your email address and new password.

5. You now have access to the information your student has allowed you to view!
Viewing student’s information:

1. Access proxy link from the Sam Houston Proxy Relationship Information email.
   a. You will be directed to the below log in page. Use your email address as your username and the password you previously created.

![Login Page]

2. If you have multiple students, find the one you want to view information for and select which page to view from the dropdown.

![Dropdown Menu]

**NOTE:** If there is a page you cannot see but believe you should have access to view, you will need to contact your student.
Updating account information:

1. Access proxy link from the Sam Houston Proxy Relationship Information email.
   a. You will be directed to the below log in page. Use your email address as your username and the password you previously created.

2. Select Proxy Personal Information at the top of the landing page.
3. Make changes as necessary and select submit at the bottom of the page.

**NOTE:** If you update your email address, the below message will appear.

Changes have been saved -- including a request to change e-mail address. Two email messages have been sent. The first message was sent to the old email address allowing you to cancel the change. The second message was sent to the new e-mail address allowing you to validate the change. You will not be able to login to this proxy account until the link contained in one of the messages is executed.
When access expires:

Once your access expires, you will be notified by a pop-up upon login notifying you. If you require continued access, please contact your student.