# Student Users: Instructions for Setting up a Proxy User to view Student Records Information

NMSU Students may provide "proxy access" to parents/guardians/spouses as desired by going online at my.nmsu.edu. Students can choose what information their proxies may have access to. For example, students may want their proxy to be able to view their NMSU Financial Aid history and status, Registration, Student Account or Student Records. By granting proxy access, the student permits their proxy to view this information online, and it also allows their proxy to have discussions about the information with NMSU Accounts Receivable.

### Student Instructions for Adding a Proxy User:

1) Sign into **myNMSU** with your NMSU username and password.
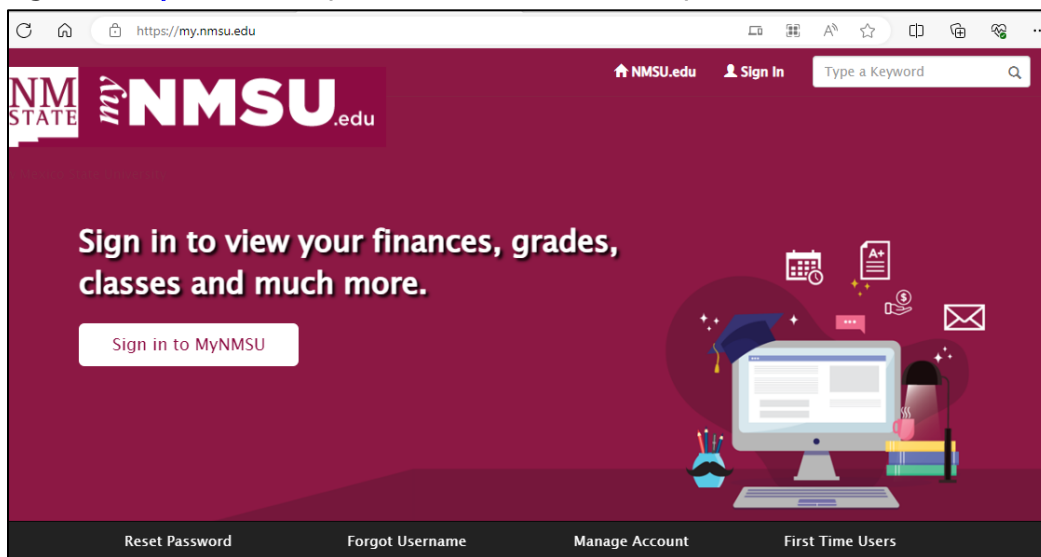


2) Click or search for the card called **Student Account Management** located on your dashboard and click on **Student Proxy Management**.
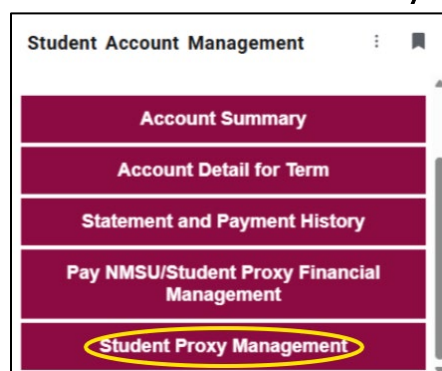
3) Click on **Add Proxy**.

> ## Proxy Management
>
> **You have no proxy added yet.**
>
> Add a new proxy using the button below. Then edit their profile and authorization settings to enable appropriate access.
>
> [ Add Proxy ]

4) Type in the required information *for your proxy*.  Please note: <u>this is not the student's name or email address</u>.  A valid email address for your proxy is required for your proxy to receive communications that are necessary to finalize the setup of their account access.
   a. **Relationship** – (Required) Select myNMSU Proxy from the drop-down menu.
   b. **Description** – (Optional) Enter a personal note about the proxy (spouse, parent, guardian, etc.)
   c. **Start Date** – (Required) Defaults to today's date.
   d. **Stop Date** – (Required) Defaults to 5 years from now.
      i. Note: **Start/Stop Dates** allow you to control how long your proxy can access your information.  The **Stop Date** can be as far into the future as you would like it to be.  However, access is deactivated when you are no longer a student at NMSU.

> ### Proxy Information ⓘ
>
> **Profile** *(Required)*
>
> **First Name**
> [ First Name ]
>
> **Last Name**
> [ Last Name ]
>
> **E-Mail**
> [ E-Mail Address ]
>
> **Verify E-Mail**
> [ Verify E-Mail Address ]
>
> **Relationship** ⓘ
> [ Select a Relationship ▾ ]
>
> **Start Date**                **Stop Date**
> [ MM/dd/yyyy 🗓 ]          [ MM/dd/yyyy 🗓 ]
>
> **Additional Information**
>
> **Description**
> [ Description ]
>
> **Authorizations** *(Required)* ⓘ
>
> ☐ Select All          **Copy Authorizations** ⓘ
>                       [ Select a Person ▾ ]
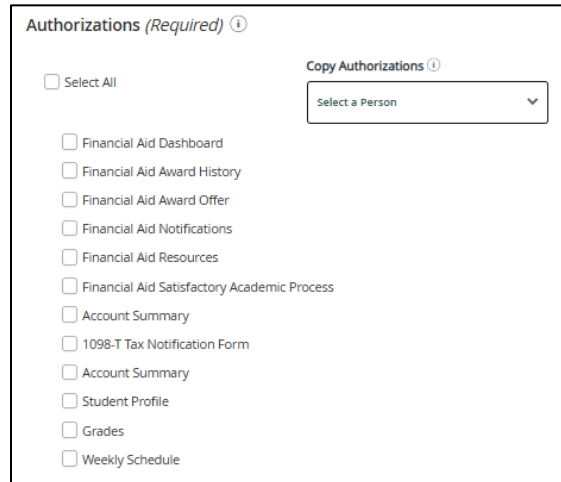
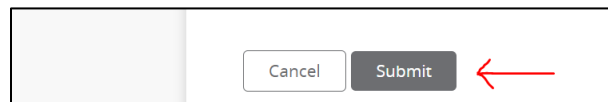NM STATE UNIVERSITY

5) As you proceed to fill in the data fields, AUTHORIZATIONS will become available at the bottom of the screen.
   a. Check the boxes for the information that you would like to share with your proxy.
   b. Please note, COPY AUTHORIZATION can be used only after you set up your first proxy. This function is in case you set up more than one proxy.



6) Once the fields are correctly populated, click on the **Submit** button at the bottom of the screen.



7) You should be directed to a new screen that shows your new proxy.
   a. Your proxy will initially show up as INACTIVE, until they complete the steps on their end to finalize the process.
   b. REMINDER: While you are completing the above steps, your proxy will be receiving emails instructing them on the steps needed to finalize their access. Thus, it is important that you complete all steps in sequence at one time, to ensure that your proxy doesn't experience any issues with gaining access.



8) You have now completed the set up for your proxy to access your selected student records. Your proxy will need to take steps on their side of things, to finalize the process.