

## Proxy Access Set Up

Proxy Access allows you to specify who should be able to view your bill, grades, holds and other important information. You need to set this up for whoever is responsible for the payment of your bills since bills are made available online.

### Setting up proxy access for an individual


In TreeHouse, select the “Proxy Access” link. This will take you into the Proxy Access tab in TreeHouse Self Service.

**If you are setting up Proxy Access for the first time, you will need to click on “Proxy**

**Management” and then the “Add Proxy” link (  [Add Proxy](#)) at the bottom of the page.**

- You will need to provide the first and last name of the individual you would like to grant proxy access to and their email address. This email address will be used to send the individual information on how to complete their access.
- Once you have completed the information, click on the “Add Proxy” button.  
**NOTE:** As soon as you provide the name and email address for the person and click the button, an email is sent to the individual with a link that allows them to set up their PIN. Once the individual has done this, s/he will receive another email with the link to proxy access login. The email address and PIN will be used to login.

### To add details to Proxy Access for an individual:

- Click on the “Expand [name]” link  [Expand](#) with the name of the person whose details you need to view/edit.
- If this is a person you just granted Proxy Access, select a relationship for the individual.
- Add a description such as “Dad”, “Mom”, “Friend”, “Grandparent”, “Spouse,” if you like.
- If you provide a passphrase, this allows the individual to speak to someone at the University about what they see if they provide the correct passphrase.
- The start and stop dates determine when the individual will be allowed to view the areas you have given them access to. It defaults to today and a year from today. You may make the range anything you would like.
- If you did set up a passphrase for the individual, you can email the passphrase to them by clicking on the link “E-mail Passphrase”.
- If the individual has forgotten their PIN, you can reset it for them by clicking on the “Reset Pin” link. An email will be sent to them with instructions on how to reset their PIN.

### Setting up the access desired for the individual


- Use the Authorization tab in Proxy Access
- Check the box to the left of any access you would like the individual to have. You can check the box to the left of “General Information”, “Student Account”, or “Student Records” to give the individual access to all items listed underneath that header.

- If you have already set up access for a different individual and you would like this individual to have the same access, you can copy authorizations by selecting the individual you would like to copy from in the drop down box. It takes a moment for the access to be copied in.
- You can email the individual with a list of the authorization you set up by clicking on the “E-mail Authorizations” link to the right.



**To see a list of the history of your authorizations for the individual:**

- Click on the “History” tab. The history of what access you have enabled or disabled is listed with the date and time the action took place. You can also see the date and time the individual logged into proxy access and what they viewed.

**To see a list of all communications that have taken place with the individual:**

- Click on the “Communication” tab. A history of all emails sent to the individual with the dates and times are listed. You can opt to resend any email that has been sent previously by clicking on the email icon  to the far right of the email information.

**To see/adjust another proxy’s information:**

- Click on the “Collapse [name]” link  [Collapse](#) for the person you have open and the “Expand [name]” link  [Expand](#) for the person whose access you wish to view or adjust.