FERPA Access Approval APP *pre-ALPHA*

Lydia Hall

James L Van Roekel

Innovation Department

FERPA Access APP Spec *pre-ALPHA*

- Background

- Students currently elect to provide access to their student records as permitted by FERPA, using several disparate methods:

  - Submitting paper FERPA release form per Financial Aid,

  - Granting access through the Banner Proxy Portal, and/or

  - Granting access through TouchNet.

- However, each of these mechanisms creates a disjointed and siloed experience for students and their authorized users.

- A single approach to managing FERPA authorizations will improve user experience for both students and staff.

FERPA Access APP Spec *pre-ALPHA*

- One Toggle for all access options

- List Typology

Financial Aid and Scholarships
- FAFSA/TASFA Application status
- Scholarship application status
- Verification requirements and status
- Status of awards
- Eligibility for aid
(Satisfactory Academic Progress)
- Eligibility for earning aid paid
(Attending classes)
- Financial Aid Hold Information

Student Account Records
- Billing Statements
- Account Activity
- 1098Ts
- Payment Activity and Payment History
(Includes cash like payments, state exemptions, waivers, third party contracts, external scholarships, disbursed financial aid, electronic check and card payments)
- Payment Plan and Payment Communications
- Financial Enrollment Drop Status
- Financial Refund Activity
(This does not allow authorized users to pick up or receive refund payments)

Student Academic Record Information Release
- Grades
- Academic Standing
- Degrees
- Transcripts
- Enrollment Status
(registration/resignation)
- Graduation status
- Class Schedules
- Registration holds
- Excessive hours

FERPA Access APP Spec *pre-ALPHA*

List of Questions from each area

Registrars

- Will the release be set to expire at any point? We currently have Proxy Portal set to expire 5 years from the date of permission granted.
- Will The student be allowed to designate multiple people to have access to their records? *Yes*

Student Account Services

- I know ideally, we want this to be fully electronic, but I do believe we should consider a paper form for individuals with limited access to internet resources. For example: Prisoners, trustees, lower income, homeless etc. These individuals should not be locked out of granting access for authorized users based on their life circumstances.
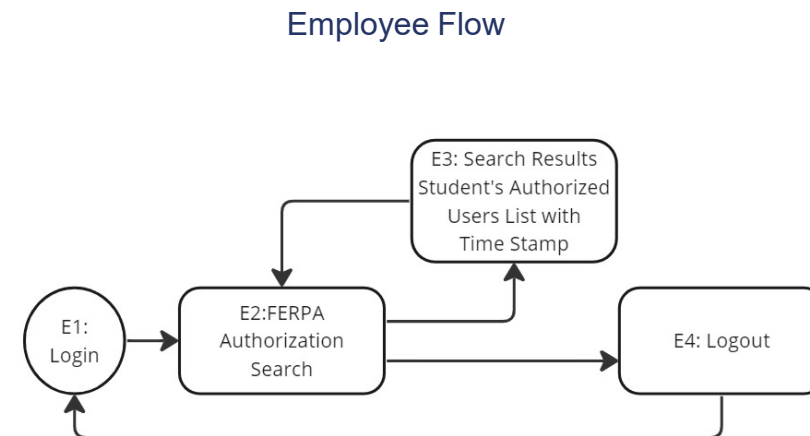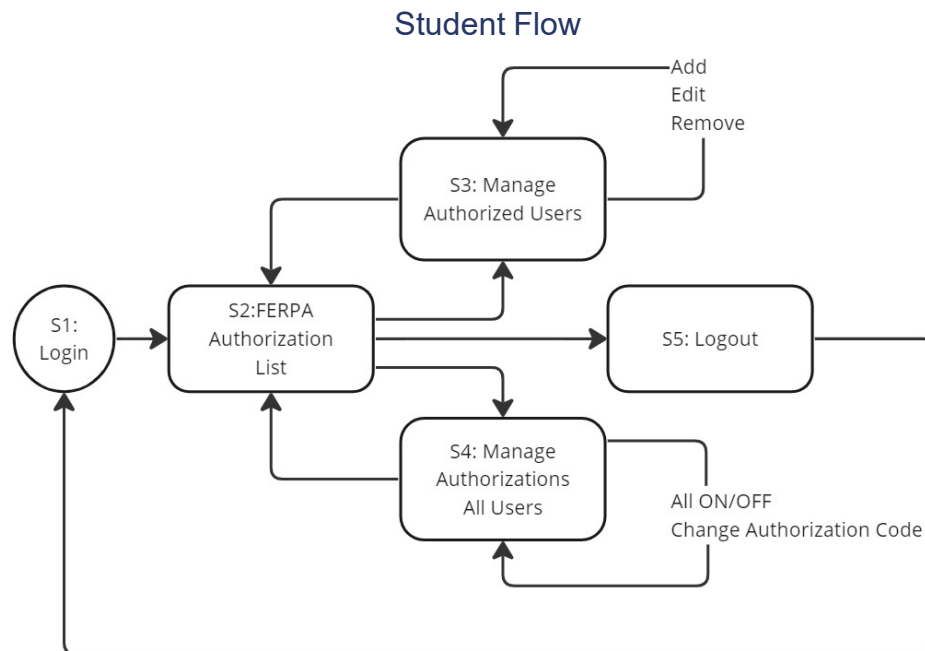
Financial Aid and Scholarships

- We also agree with the 5-year timeframe (remove access after 5 years of granting). But I would like to see communication sent to those that are enrolled the term prior to expiration.
- We have another question/suggestion: Should we add Admissions to this? For residency, final high school transcript and admission status? Also, can we include payment holds (past due balance and return checks)?

FERPA Access APP Spec *pre-ALPHA*

- Verify APP mock-up items
  - Add/remove options and/or functionality
  - Check navigation
  - Finalize scope for IT connectivity
  - Test Flows*

Student Flow

Add
Edit
Remove

S3: Manage Authorized Users

S1: Login

S2: FERPA Authorization List

S5: Logout

S4: Manage Authorizations All Users

All ON/OFF
Change Authorization Code

Employee Flow

E3: Search Results Student's Authorized Users List with Time Stamp

E1: Login

E2: FERPA Authorization Search

E4: Logout

*S and E Flows follow scenarios in FERPA Project Scope document

FERPA Access APP Mock-up *pre-ALPHA*

SHSU FERPA Authorization

Use this tool to add and remove FERPA information access to other individuals of your choosing, such as parents or guardians.

Click here for more FERPA information

Login
Please enter your SHSU Username
username

Please enter your SHSU Password
password

SUBMIT

SHSU FERPA Authorized List +

James Smith
jsmith@shsu.edu

frank lynn
frank@shsu.edu

Frank Furter
email@shsu.edi

hen Ry
432@shs

hen Ry
432@shs

SHSU FERPA Contact Entry

* First Name

* Last Name

* SHSU Email Address

* Permanent Address

* Phone Number

This was successfully completed

SHSU FERPA Access List

On the next screen you will have opportunity to give or deny access to your FERPA information. This includes access to the following:

Registrar's Stuff and Things

Financial Stuff and Things

Annotations on the Lists

Academic Blah-de-blah

Fifth in the List

SHSU FERPA Access Entry

By selecting yes, you are granting access to all of those you are sharing FERPA data with per your choices below. Please enter the authorization Code that authorized viewers will need to access your information.

Authorization Code

* ALL
◉ Yes
○ No

Submit

APP Login Screen Submit to Check Screen

Authorized List Current Users to Contact Entry removes record

User Contact Entry to Authorized List to add entry then to Check Screen
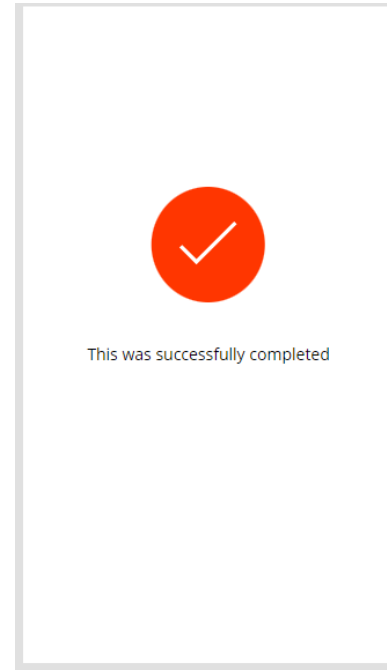
Check Screen auto returns to Authorized List

FERPA Access List to Access Entry

Approve/Deny All FERPA Access Submit to Check Screen