Proxy Access to Student Record Information in CaneLink
A Step-by-Step Guide for Proxies

It's all about the student

In an ongoing effort to improve the student experience, the University of Miami is implementing a new student information service called CaneLink to replace the legacy system, myUM. Delegates who have been active in the myUM system will be converted into Proxies with the same privileges in CaneLink. For new proxies (or those that were not converted from myUM) the process for creating and maintaining a proxy account in CaneLink is controlled by the student. Once they grant access, the process for the Proxy is simple and straightforward. Students navigate to the Student Center and click the "Share My Information" to register a proxy for their student record. Proxies will be notified of this access to the Proxy Home page through an email sent to an address provided by the student during the registration process. The email will outline what types of student records information the Proxy has been granted which could consist of:

1. UM Financial Aid Information
2. UM Billing and Payments Information
3. UM Grade and Transcript Information
4. UM Health Insurance Information

When you receive this email you will be provided instructions to complete the process. These will include directions for accessing the CaneLink system and the terms and conditions you must follow when accessing someone else's information. (If you are expecting receipt of this email and don't see it, check your "Junk E-mail.")

Sample proxy confirmation email:

Maria Ibis, you have been granted access to Sebastian Ibis's University of Miami education records. You will be able to view or take action on the following transactions on Sebastian Ibis's behalf:

-UM Billing and Online Payments
-UM Financial Aid Information
-UM Grade/Transcript Information
-UM Health Insurance Information

Instructions:
1. Click here to access CaneLink. You will be asked to sign in using your existing CaneID and password. If you do not already have a CaneID, you will be able to create one.
2. After signing in to CaneLink, you will be required to accept or decline the "Terms and Conditions for accessing education records that belong to a student at the University of Miami".
3. You will also be required to enter the following two pieces of information:

    a) The **Security Key:** (e.g., DZOMMg3)
    b) The email address where we sent you this notification.

(The above steps are only required the first time you register to access your student's information.)

Signing into CaneLink

For those of you who have had myUM "delegate" access in the past, you can sign into the CaneLink system (https://canelink.miami.edu) using the same Cane ID and password you used in myUM. If you don't have an active Cane ID or you have forgotten it, you can click on the "Forgotten your CaneID or Password" link on the login page.

Register as a Proxy User and Accept the Terms of Use

Access to approved student record information will be granted upon completion of the "Terms and Conditions" document. Once this document is completed and submitted your access will be activated.

Maria Ibis

Terms and conditions for accessing somebody else's data

Terms and Conditions

You have been granted access to view or update education records that belong to a student at the University of Miami. By accepting these terms and conditions, you consent to protect the privacy of the records and to use or modify the records fairly and lawfully.

The following terminology applies to these Terms and Conditions: "Delegator" refers to the person who delegated access to you. "Proxy" refers to you, the person authorized to view or update the Delegator's records on his or her behalf.

Agreement:
All proxies are required to sign this agreement confirming their understanding and acceptance of this policy for each of the delegators that delegated them access to their records. You sign the agreement by accepting the terms and conditions, entering your Security Key and your email address below.

☐ I accept terms and conditions

☐ I decline terms and conditions

Security Key _____ (Security Key was included inside the email notification you received)

Contact Email _____ (Email address where email notification was sent to you)

Your Personal Information

Prefix:			
***First Name:**		**Middle Name:**	
***Last Name:**		**Suffix:**	
Gender:		**Highest Education Level:**	
Date of Birth:		**Marital Status:**	

Mailing Address

***Country:**

***Address Line 1:**

Address Line 2:

Address Line 3:

***City:**   ***State:**   ***Postal:**

Telephone:

Your Employment Information

Occupation: **Employer:**

Country:

Address Line 1:

Address Line 2:

Address Line 3:

City: **State:**   **Postal:**

Telephone:

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The Proxy Home page

The following is an example of what you might see, depending on what access you are granted, when you arrive in CaneLink. In this example, Sebastian has granted permission for his Proxy to access his UM financial aid information, his billing and payment information, his grades and transcript information and his UM health insurance information. Sebastian has the option of controlling what his Proxy can see. He also has the ability to make changes in what his Proxy can see.