

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

In an ongoing effort to improve the student experience, the University of Miami offers Proxy access to CaneLink for any proxy delegate designated by the student. Creating a CaneLink proxy account can be done with just a few simple steps. Students must first navigate to the Student Center in CaneLink and click the "Share My Information" button to request proxy access to their student record/financial information. Once the student completes the request form, along with the proxy's contact email address and chooses which student record information to grant permissions to, an email will be sent out to the selected proxy outlining the next steps in the account setup. An example of the setup email sent to the proxy, as well as the types of student record information that are available, can be found below:

Student Record information available:

1. UM Financial Aid Information
2. UM Billing and Payments Information
3. UM Grade and Transcript 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 setup/confirmation email:**

Maria Ibis, you have been granted access to Sebastian Ibis's University of Miami educational 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

**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.

The screenshot shows the University of Miami's UM Single Sign-On page. At the top, there is a navigation bar with the University of Miami logo and links for ABOUT US, ADMISSIONS, ACADEMICS, LIBRARIES, and GIVE TO UM. The main content area is titled "UM Single Sign-On" and contains a message: "You have requested access to UM Single Sign-On which requires University of Miami authentication." Below this, there are two columns of links. The left column is for "CaneID" and "Password", each with an input field and a "Forgot your CaneID?" or "Forgot your Password?" link. The right column is for "Your CaneID Account" and "Help Topics", each with a "Change Your Password" or "Change Your Security Question" link and a "Help with CaneID" link. A "Sign in" button is located at the bottom of the form. At the bottom of the page, there is a footer with the University of Miami logo, contact information (Cane Gebbes, FL 33124, 305-224-2211), and a list of links including Site Map, Emergency Preparedness, Blackboard, Employment, Cane Watch, Privacy Statement and Legal Notices, and Send Technical Feedback. The footer also includes the copyright notice: Copyright 2013 University of Miami. All Rights Reserved.

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:

## 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, and his grades and transcript 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.

MIAMI CaneLink Home | Add to Favorites | Sign out

Favorites Main Menu

Proxy Home

\*\*\* PLEASE NOTE \*\*\*

We have received reports of Safari on Mac being incompatible with making payments within CaneLink. If you are trying to make a payment, and using Safari on a Mac, please temporarily change the following setting:

- Under the Safari menu, select "Preferences"
- Select the "Privacy" tab
- Change the "Block cookies" setting from "From third parties and advertisers" to "Never".

When you have completed your payment in CaneLink, you may restore the setting to its original state.

If you have any other questions, please contact the UMIT Service Desk at (305) 284-6565 or [itsupportcenter@miami.edu](mailto:itsupportcenter@miami.edu).

Go 'CaneLink'

[Update Your Proxy Email Address](#)

**UM Financial Aid Information**  
[View To Do List](#)  
[View Financial Aid](#)

**UM Billing and Payments Information**  
[View Cane Express Balance](#)  
[View Account Summary/Make a Payment](#)  
[View Account Activity](#)  
[View Pending Financial Aid](#)

**UM Grade / Transcript Information**  
[View Course History](#)

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