Delegate Access

Student Authorization

Delegate Set-up

How It Works
Student Profile: Delegate Access

Manage Delegates

Delegates are individuals who can act on a student’s behalf by paying bills, viewing academic information, etc. They are often parents or guardians of students. Students choose which privileges to delegate, and can change those privileges at any time.

Create or manage delegates

Other information:
- Free/busy: To give a delegate a free/busy view of your bCal calendar, follow the bCal instructions.
- Profile and bConnected content: Delegates can view neither profile information nor bConnected content: mail, calendar, etc.
- Advisors: Advisors can view all financial and academic information shown in CalCentral but cannot see Profile or bConnected content.

calcentral.berkeley.edu
Share My Information - Getting Started

Below is the list of contacts you delegated access to your own data. To edit the information for a contact, click the Edit button. To delegate access to a new contact, click the Delegate Access to a New Contact button.

No current delegated access found.

Delegate Access To A New Contact
In compliance with the Federal Family Education Rights and Privacy (FERPA), the university is prohibited from providing certain information from your student records to a third party. This restriction applies, but is not limited, to your parents, your spouse, or a sponsor.

FERPA is a Federal law that is administered by the Family Policy Compliance Office (Office) in the U.S. Department of Education (Department). 20 U.S.C. § 1232g; 34 CFR Part 99. Once a student reaches 18 years of age or attends a postsecondary institution, he or she becomes an "eligible student," and all rights formerly given to parents under FERPA transfer to the student. The eligible student has the right to have access to his or her education records, the right to seek to have the records amended, the right to have control over the disclosure of personally identifiable information from the records (except in certain circumstances specified in the FERPA regulations, some of which are discussed below), and the right to file a complaint with the Department. The term "education records" is defined as those records that contain information directly related to a student and which are maintained by an educational agency or institution or by a party acting for the agency or institution.

I understand that, by clicking the "I accept" button below, I am giving written consent for University representatives to disclose student information specified by me herein to the individual(s) identified as a contact name for the purpose of facilitating the administration of the specified information. I am entitled to change, amend or rescind this authorization at any time.
Enter Information for Delegate

Share My Information - Details

The "Code Phrase" is a special phrase you need to share with your delegate. Your delegate will be prompted for the code phrase when contacting UC Berkeley administrative offices. If the phrase given matches what you generated, your delegate will be authorized to receive your information over the phone or in person.

If your existing delegate loses the confirmation email message, or you want to resend the confirmation message, there is no need to enter the information again. Instead, click the Edit button for that delegate and then click the Resend Email Notification button.

Any information that can be viewed online can also be requested by phone or in person.

<table>
<thead>
<tr>
<th>Transaction Name</th>
<th>Description</th>
<th>Start Date</th>
<th>Transaction Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academics: Class Enrollment Only</td>
<td>View current and past class enrollments (online)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academics: Enrollment and Grades</td>
<td>View class enrollments and grades (online)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Adding a Delegate

Create a Code Phrase
Will be used by the Delegate when speaking with a staff member; helps to validate they are the Delegate

Select Access Options
** Academic: Enrollments (grades Y/N)**
** Finances: Financial Aid and Bill Paying**
An email notification will be sent to Delegate Name.

The next step is to inform your delegate about new or changed permissions via email. CalCentral is not able to inform you if the message bounces. Click Ok to continue, or click Cancel to edit delegate details. It may take up to 24 hours for a delegate to receive the message.

Delegates will not be able to pay a bill online until one day after the delegate first creates their CalNet account.

Changing Delegate Permissions
You can change your delegate's permissions and other information at any time.
1. On CalCentral's Profile page, click Manage on the Delegate Access card.
   The Share My Information - Summary page appears.
2. Click the Edit button for that delegate.
   The Share My Information - Details page appears.
3. Select or deselect any permissions or update other information.
4. Click Save.

[OK] [Cancel]
Confirmation

Student authorization is done!

Now the Delegate needs to take action **within 3 days**!

Start by viewing the email from CalCentral.

It’s been 3 days and my Delegate didn’t do their set-up!

No problem. Go back to the beginning. Delete the original delegation request and re-create a new one. Alert your Delegate that a new email from CalCentral is on the way.
Delegate Setup
Delegate Name, 

Student Name is authorizing UC Berkeley to grant you access to student record information.

Please set up your delegate account by following the steps at the end of this message. Once your account is activated, you may obtain information through the online systems, over the phone or in-person.

Notes:

- Your security key will expire in three days after this message was sent. If it has expired, ask your student to click the Resend Email button on their Share My Information page. A new email message will be sent to you with a new security key.
- Please allow up to 24 hours for activation of delegate access to the online bill payment system.

If you have questions, please visit our information pages:

- CalCentral Help
- Cal Student Central

Yours,
The staff at UC Berkeley

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**Setting up your account**

To set up your account, you’ll first need to have a CalNet ID.

1. Write down these two pieces of information for use during account setup:
   - **Your Security Key:** [redacted]
   - **Your email address:** [redacted]@gmail.com

2. If someone such as a student or staff member is currently signed into CalCentral on your computer, have them sign out now.

3. Create a CalNet ID (if you do not already have one):
   
   [https://bpr-t1.calnet.berkeley.edu/account-manager/delegate/createCalnetIdRedirect?claimToken=Um0HbIlIImnj](https://bpr-t1.calnet.berkeley.edu/account-manager/delegate/createCalnetIdRedirect?claimToken=Um0HbIlIImnj)

4. Link Your Account to activate your access:
Create a Delegate Login ID to use for accessing CalCentral
Next Step:
Link Delegate ID to Student Record

Enter your new CalNET login that you just created.

Remember your CalNET ID and Passphrase for future CalCentral access.
FINAL step:

Enter your **Security Key** and your **email address** from the instruction email you received.
SUCCESS!
You are now logged on to CalCentral!

Use ‘My Toolbox’ to access your Student’s record
Delegate Experience - How It Works
Always start at: CalCentral.berkeley.edu
Delegate Home Screen

Click on **Student Name** to view their record
View Academic Info
View Financial Info

My Finances

Billing Summary

- Amount Due Now: $1,755.00
  - Includes Past Due Amount of $52,755.00
- Account Balance: $755.00
  - Includes charges not yet due

Make Payment

Financial Aid and Scholarships 2016-17

- Aid Year: 2016-2017
- Semesters: Fall and Spring
- Estimated Cost of Attendance: $1,508
- Gift Aid (MONEY YOU DON'T REPAY): $1,200
- Net Cost: $1,308

Funding Offered

- Gift Aid: $1,200
- Grants and Scholarships: $1,200
- Other Funding: $250
- Loans: $250

Financial Resources

- Billing & Payments
  - Billing Services
  - e-bills
  - How does my SHIP Waiver affect my billing?
  - Payment Options
  - Registration Fees
  - Tax 1098-T Form

- Financial Assistance
  - Berkeley International Office
  - Cost of Attendance
  - Dream Act Application
  - FAFSA
  - Federal Student Loans
  - Financial Aid & Scholarships Office
  - Financial Literacy
  - Graduate Financial Support
  - Loan Repayment Calculator
  - MyFinAid (aid prior to Fall 2015)
  - National Student Loan Database System
  - Student Advocates Office
  - Work-Study
View Financial Details - Make a Payment

- Pay online / See statement
- See charges, due dates, payments
View Billing Details - Account Activity
## My Finances » Details (Fall 2016)

### Billing Summary FALL 2016

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>Type</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Premium Meal Plan - Foothill</td>
<td>$300.00</td>
<td>Charge</td>
<td>08/19/16</td>
</tr>
<tr>
<td>Original Amount: $300.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term: Fall 2016</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type: Charge</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make Payment for Fall 2016</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Amount Due Now**: $300.00

**Account Balance**: $300.00

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**Notes**: Due now · Overdue → Due in the future

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**Oski Bear TEST DATA**

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**Search, Click for Details**
What You Need to Know

➤ Delegates do not have access to:

- Activate the Tuition and Fee Payment Plan. This is an agreement between the university and the account holder (i.e., the student).

- Authorize Electronic Funds Transfer (EFT). Any refunds or overpayments on the account are disbursed to the account holder (i.e., the student).

➤ ‘Other Payers’ with access to CARS accounts through Bear Facts must be re-authorized by the student for access to CalCentral

➤ After linking the Delegate log-on to the student record, it takes up to 24-hours for the Delegate log-on to be active in the Online Payment and Statement system
Resources

CalCentral.berkeley.edu
Resources

Questions

Billing, Financial Aid & Student Records
Cal Student Central
Phone
(510) 664-9181
M-F: 9 am -12 noon, 1 pm - 4 pm

In Person
120 Sproul Hall
M-F: 9am - 4pm

Open a Case Online
24-48 hr response time
Studentcentral.berkeley.edu

Technical Help

CalCentral Website
calcentral.berkeley.edu

Technical Help Email
sishelp@berkeley.edu

How-to Resources Website
SIS.berkeley.edu/students