

# Delegate Access

Student Authorization

Delegate Set-up

How It Works



# **Student Authorization**

# Student Profile: Delegate Access

**CALCENTRAL**

My Dashboard My Academics My Finances My Campus

Status **1**

**Amount Due Now:** TEST DATA

**2** Profile  
Log out

**3** Delegate Access

**4** Create or manage delegates

## 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.

**3** [Create or manage delegates](#)

**4** 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

CALCENTRAL

[Return](#)

## Share My Information - Summary

---

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](#)

## Share My Information



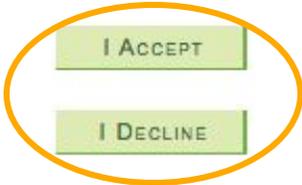
Read

### Share My Information - Terms and Conditions

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.



I ACCEPT

I DECLINE

Brent Daniels

## Share My Information

## 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.

\*Contact Name:

\*Relationship:

\*Contact Email Address:

\*Confirm Email Address:

Contact Status: Unknown

\*Code Phrase:



| Transaction Name  | Description   | Start Date | Transaction Status |
|---|---|------------|--------------------|
| <input type="checkbox"/> Academics: Class Enrollment Only | View current and past class enrollments (online)  |            |                    |
| <input type="checkbox"/> Academics: Enrollment and Grades | View class enrollments and grades (online)  |            |                    |
| <input type="checkbox"/> Finances: View and Pay           | View financial aid and scholarships. Coming in July 2016: view my bills, pay my bills (online). |            |                    |

SELECT ALL

CLEAR ALL

SAVE

# Adding a Delegate

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

**\*Contact Name:** Delegate Name

**\*Relationship:** Mother

**\*Contact Email Address:** [redacted]y@gmail.com

**\*Confirm Email Address:** [redacted]y@gmail.com

**Contact Status:** Unknown

**\*Code Phrase:** bluebear

| Transaction Name   | Description   | Start Date | Transaction Status |
|--|---|------------|--------------------|
| <input type="checkbox"/> Academics: Class Enrollment Only            | View current and past class enrollments (online)  |            |                    |
| <input checked="" type="checkbox"/> Academics: Enrollment and Grades | View class enrollments and grades (online)  |            |                    |
| <input checked="" type="checkbox"/> Finances: View and Pay           | View financial aid and scholarships. Coming in July 2016: view my bills, pay my bills (online). |            |                    |

SELECT ALL CLEAR ALL

SAVE

## 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

# Next Steps

## Message

An email notification will be sent to Delegate Name

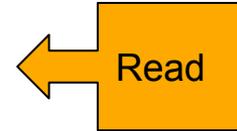
The next step is to inform your delegate about new or changed permissions via email. CalCentral is not able to inform you if the message bounces. Click Ok to continue, or click Cancel to edit delegate details. It may take up to 24 hours for a delegate to receive the message.

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

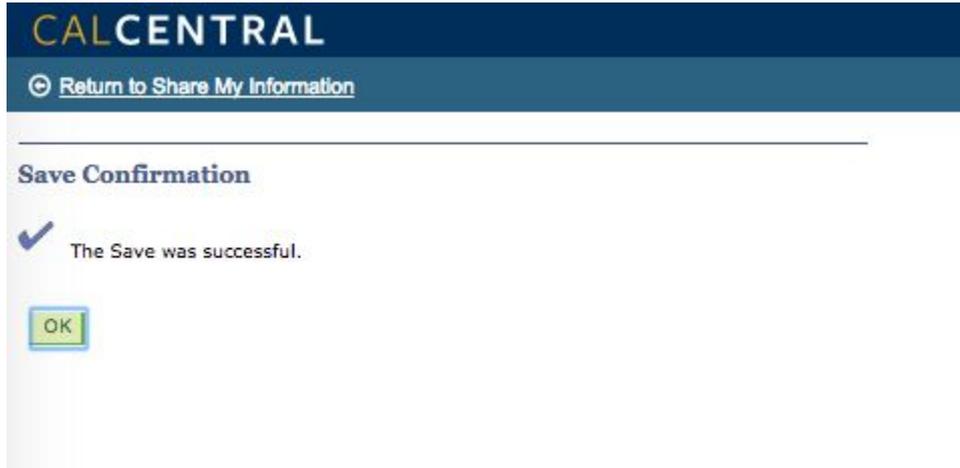
Cancel

Start Date

Transaction Status

enrollments (online)

# Confirmation



CALCENTRAL

[Return to Share My Information](#)

---

**Save Confirmation**

✓ The Save was successful.

OK

Student authorization is done!

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

Start by viewing the email from CalCentral.

OH NO...



**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

Do next  
step  
within 3  
days!

Billing  
access  
takes  
another  
day

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

# email: Delegate Instructions

## 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: 3p[redacted]
- Your email address: b[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=Um0HCiHmnj>

4. Link Your Account to activate your access:

You'll need to enter your **Security Key** and **email address** during the set-up process

Start here



# Delegate CalNET Setup

## Welcome Delegate Name

Please fill in the required fields below to create your CalNet ID. After it is created, you will be able to use your CalNet ID and passphrase to log into UC Berkeley's applications.

Create your CalNetID (we will verify it as you type) \*

 ✓ ?

Create your CalNet passphrase (we will verify it as you type) \*

 ✓ ?

Enter your passphrase again. \*

 ✓ ?

I Agree to the CalNet User Terms of Service ✓

Activate Account

Create a Delegate Login ID to use for accessing CalCentral



## CalNet Authentication Service

CalNet ID:

Passphrase (Case Sensitive):

**SIGN IN**

[HELP](#)

[Sign In with MAP@Berkeley ID](#)

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# 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.

## Linking Your Account

## Link Your Account with Your Student

Enter information from the email message you received:

Security Key: \*

3d [redacted]

Email Address [1]: \*

be [redacted]@gmail.com

 I agree to the terms and Conditions.[Show](#)[Link](#)

[1] Email address where you received your delegate message.

# Linking Delegate ID to Student Record

FINAL step:

Enter your **Security Key** and your **email address** from the instruction email you received

## My Toolbox

### Welcome to CalCentral

#### You are a Delegate

CalCentral is the portal for the University of California, Berkeley. If you are seeing this view of CalCentral, you have been designated as a Delegate by a Berkeley student. Delegates are often parents, guardians or other trusted adults.

You may be a Delegate for more than one student.

#### Using CalCentral

##### Your Privileges

A student (your Delegator) has delegated privileges to you. Your privileges may include features such as paying bills and viewing the student's schedule.

[Show more](#)

### Students



Oski Bear

**Adding other students:** Are you a delegate for other students but don't see them listed above? To add them, please follow the instructions in the email you received for each of them.

### Academic Dates & Deadlines

**May 23 - Aug 12:** Summer Sessions

**May 23:** Summer 2016 - 6 Week Session begins

**May 30:** Academic/Administrative Holiday

**Jun 6:** Summer 2016 - 10 Week Session begins

**Jun 20:** Summer 2016 - 8 Week Session begins

**Jul 1:** Summer 2016 - 6 Week Session begins

**Jul 4:** Academic/Administrative Holiday

**Jul 25:** Summer 2016 - 3 Week Session begins

**Aug 12:**

- Summer 2016 - 10 Week Session ends
- Summer 2016 - 3 Week Session ends
- Summer 2016 - 6 Week Session ends
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**Aug 17:** Fall 2016 Semester Begins

**Aug 22:** Fall 2016 - Convocation

**Aug 24:** Fall 2016 - Instruction Begins

**Sep 5:** Academic/Administrative Holiday

**Nov 11:** Academic/Administrative Holiday

**Nov 23:** Fall 2016 - Non-Instructional Day

**Nov 24:** Academic/Administrative Holiday

**Nov 25:** Academic/Administrative Holiday

**Dec 2:** Fall 2016 - Formal Classes End

**Dec 5 - 9:** Fall 2016 - RRR Week

**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](https://CalCentral.berkeley.edu)

CALCENTRAL

Your campus info...anywhere!

Sign In

Learn More



Berkeley  
UNIVERSITY OF CALIFORNIA

## CalNet Authentication Service

CalNet ID:

Passphrase (Case Sensitive):

**SIGN IN**

[HELP](#)

[Sign In with MAP@Berkeley ID](#)

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# Delegate Home Screen

Click on **Student Name** to view their record

# View Academic Info

## My Academics

### Profile

You are not officially registered for the Summer 2016 term.

### Academic status as of Spring 2016



Oski Bear

**Majors** College of Letters & Science  
American Studies  
Astronomy  
Statistics

**Academic Career** Undergraduate

**Level** Oski Bear  
**Cumul Units** TEST DATA

**GPA** Show GPA

### Semesters

#### Fall 2016

| Class       | Title                                       | Units | Book List |
|-------------|---|-------|-----------|
| MEC ENG C85 | Introduction to Solid Mechanics             | 3.0   |           |
| MUSIC 180   | Seminar in Ethnomusicology: Selected Topics | 3.0   |           |
| SOCIOL 3AC  | Principles of Sociology: American Cultures  | 4.0   |           |

#### Summer 2016

| Class     | Title                        | Units | Book List |
|-----------|------------------------------|-------|-----------|
| FRENCH 4  | Advanced Intermediate French | 5.0   |           |
| JOURN 111 | Social Media and Journalism  | 3.0   |           |

#### Spring 2016

| Class       | Title                           | Un. | Gr. |
|-------------|---------------------------------|-----|-----|
| SOC WEL 197 | Field Studies in Social Welfare | 1.0 | --  |

### Class Enrollment SUMMER 2016

#### Tele-BEARS for Summer 2016

More information about enrollment in summer classes may be found on [Tele-BEARS](#).

⚠ We are in the middle of a large systems migration. If you are a **newly admitted fall undergraduate or graduate student** wanting to enroll in a summer class, you will require a temporary summer ID and password. Please go to the [Navigating UC Berkeley's Student Systems, Summer '16](#) page.

### Class Enrollment FALL 2016

🛑 You have a hold that may affect your ability to enroll in classes. Consult with an advisor.

| Activity               | When              |
|------------------------|-------------------|
| 1. Multi-year Planner  | ⏪                 |
| 2. Schedule of Classes | Prior to Apr 17 ⏪ |
| 3. Schedule Planner    | Mar 28 ⏪          |

# View Financial Info

## My Finances

### Billing Summary [Details](#)

|  |             |
|--|-------------|
| <b>Amount Due Now</b><br><small>Includes Past Due Amount of \$ 52,755.00</small> | \$ 1,755.00 |
| <b>Account Balance</b><br><small>includes charges not yet due</small>            | \$ 1,755.00 |

[Make Payment](#)

### Cal 1 Card

**You don't have a debit account.**  
[Learn more about Cal 1 Card](#)

**You don't have a meal plan.**  
[Learn more about Meal Plans](#)

**Oski Bear  
TEST DATA**

### Financial Aid and Scholarships 2016-17 [Details](#)

**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 \$ 1,450**

|                         |          |
|-------------------------|----------|
| 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 2016)
- National Student Loan Database System
- Student Advocates Office
- Work-Study

[Shopping Sheet](#)

[Learn more about Financial Aid](#)

# View Financial Details - Make a Payment

## My Finances

### Billing Summary

|  |             |
|--|-------------|
| <b>Amount Due Now</b><br><small>Includes Past Due Amount of \$ 52,755.00</small> | \$ 1,755.00 |
| <b>Account Balance</b><br><small>includes charges not yet due</small>            | \$ 1,755.00 |

[Make Payment](#) **Pay online / See statement**

**Details** **See charges, due dates, payments**

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### Financial Resources

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- Billing Services
  - e-bills
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  - MyFinAid (aid prior to Fall 2016)
  - National Student Loan Database System
  - Student Advocates Office
  - Work-Study

**Oski Bear  
TEST DATA**

# View Billing Details - Account Activity

CALCENTRAL

0 31 0 Oski

My Dashboard My Academics My Finances My Campus

## My Finances » Details (Fall 2016)

### Billing Summary FALL 2016

Amount Due Now \$ 300.00

Account Balance \$ 300.00  
Includes charges not yet due

Make Payment

[View transactions prior to Fall 2016.](#)

### Activity

Print

Filter: Balance Search...

Select what you want to see

| Date     | Description                  | Amount    | Type   | Due        |
|----------|------------------------------|-----------|--------|------------|
| 08/17/16 | Premium Meal Plan - Foothill | \$ 300.00 | Charge | 08/19/16 ! |

! Due now Overdue → Due in the future

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Oski Bear  
TEST DATA

Usage Policy | About | Support

# Search, Click for Details

## My Finances » Details (Fall 2016)

**Billing Summary FALL 2016**

|  |                  |
|--|------------------|
| <b>Amount Due Now</b>  | <b>\$ 300.00</b> |
| Account Balance<br><small>Includes charges not yet due</small> | \$ 300.00        |

[Make Payment for Fall 2016](#)

[View transactions prior to Fall 2016.](#)

Click to expand details →

**Activity** [Print](#)

Filter:

| Date ▼   | Description  | Amount    | Type   | Due        |
|----------|--|-----------|--------|------------|
| 08/17/16 | Premium Meal Plan - Foothill<br><b>Original Amount:</b> \$ 300.00<br><b>Term:</b> Fall 2016<br><b>Type:</b> Charge | \$ 300.00 | Charge | 08/19/16 ! |

! Due now ! Overdue → Due in the future

**Oski Bear  
TEST DATA**

# 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

The screenshot displays the CalCentral website interface. At the top, the navigation bar includes 'My Dashboard', 'My Academics', 'My Finances' (circled in orange), and 'My Campus'. The main content area is divided into several sections:

- My Finances:** Includes a 'Billing Summary' with an alert about service transition, 'Amount Due Now' of \$755.00, and 'Account Balance' of \$755.00. A 'Pay Towards This Balance' button is present.
- Cal 1 Card:** Promotes the Cal 1 Card with a logo and text: 'You don't have a debit account. Learn more about Cal 1 Card' and 'You don't have a meal plan. Learn more about Meal Plans'.
- Financial Aid and Scholarships 2016-17:** Shows 'Aid Year: 2016-2017', 'Semesters: Fall and Spring', and a table of aid amounts: Estimated Cost of Attendance (\$575), Gift Aid (MONEY YOU DON'T REPAY) (\$2,400), and Net Cost (\$1,175). It also lists 'Funding Offered' totaling \$2,400, broken down into Gift Aid (\$2,400) and Other Funding (\$0).
- Financial Resources:** (Circled in orange) A sidebar menu listing various options: Delegate Access, Electronic Funds Transfer / EFT (Status: Not Active, Manage Account), Payment Options, Tuition and Fees, Tuition and Fees Payment Plan (Activate Plan), Tax 1098-T Form (View Form), and Billing FAQ.

Additional elements include a 'Shopping Sheet' link and a 'Learn more about Financial Aid' link at the bottom.

# 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](https://studentcentral.berkeley.edu)

## Technical Help

### CalCentral Website

[calcentral.berkeley.edu](https://calcentral.berkeley.edu)

### Technical Help Email

[sishelp@berkeley.edu](mailto:sishelp@berkeley.edu)

### How-to Resources Website

[SIS.berkeley.edu/students](https://sis.berkeley.edu/students)