Instructions for Guests - Gaining Access to View Records

**STEP 1:** Check your email for your Access Email

- When a student adds you as a guest through the UNC Charlotte Guest Access Portal, you will receive two (2) e-mail messages that contain a URL and a temporary password.
- You can click the URL provided or copy and paste it into a browser window. We recommend that you also bookmark this URL for future access. The email will look similar to this:

![Email Example](image-url)
STEP 2: Enter your Initial Password

- A screen will prompt you for your Initial Password. This temporary password was provided in the email received.
- Enter your Initial Password into the designated space and click the “Submit” button.

![Banner screenshot](image1)

STEP 3: Create your Password

- A screen will appear that allows you to create a password for future use of the UNC Charlotte Guest Access Portal.
  
  **NOTE:** Your password must be at least eight (8) characters and can use letters or numbers.

- Enter your e-mail address, your “Initial Password”, and a new password.
- Validate your new password by entering it a second time.
- Click the Submit button.
- A message will confirm that your password was successfully saved.

![Banner screenshot](image2)
STEP 4: View Profile/Verify your Profile information

The “Profile” page is where guests view student records.

- Please verify that the information on this screen is correct.
- You can change your password at any time using the corresponding link as circled below.

![Proxy Personal Information](image)

STEP 5: View Education Records

Guests will receive an email message informing them about their access when it is granted. The email will look similar to this:

```
To: Charlotte Testing

Normal Niner has authorized you to have view-only access to the following student information in the UNC Charlotte Guest Access Portal. The UNC Charlotte Guest Access Portal allows students to grant a guest, such as a parent, spouse, or employee, access to view their education records in Banner Self-Service.

Your access to the information listed below was selected by the student. If you would like to change or add additional access, please discuss this with the student. The UNC Charlotte Guest Access Portal (www.unccharlotte.edu/student-records/personal-information/guest-access-portal-form) website provides step-by-step instructions to complete your Guest Access Portal account setup.

Guest Access
- Financial Aid - Dashboard
- Financial Aid - College Financing Plan
- Financial Aid - Award History
- Financial Aid - Award Offer
- Financial Aid - Notifications
- Financial Aid - Resources
- Financial Aid - Satisfactory Requirements
- Student Grades
- Student Profile
- Tax Notification 109T
- Unofficial Academic Transcript

To request access, please contact normal@unc.edu

Thank you,
UNC Charlotte
(704) 687-5505

Please do not respond to this system-generated email. If you feel you have received this message in error, please contact registrar@charlotte.edu
```
• Click the drop-down menu next to the student’s name to view the student’s academic records. Each student who has granted this access will have a separate section.

• Click one of the options displayed to see the student’s information.
  ○ Access to a student’s academic record can only be provided by that student. If you wish to view other education record information, you must contact the student to request additional access.

Your UNC Charlotte Guest Access Passphrase
Some guests may wish to contact the University by telephone or in person to discuss matters pertaining to their student’s education records. A passphrase is a distinct verbal expression created by the student and shared with the guest.

The passphrase enables UNC Charlotte staff to confirm the guest’s identity and the information the student has allowed the guest to view. Once the student creates a passphrase, this information can be sent by the student to the guest’s email address. The email will look similar to this: