

Share My Information – Web Verify: Electronic Access to Academic Record and/or Financial Information

Provided by Cal Poly's Student Accounts Office – afd.calpoly.edu/student_accounts Revised 11/25/13


Students can provide parents and other third parties with electronic access to their personal account information through a service called Share My Information via Web Verify. Access can include financial information found on the “Money Matters” tab of the student’s my.calpoly.edu portal.

This user guide includes:

- A sample of the information available through Share My Information.
- Step by step instructions for students to create an ‘Access Code’.
- Login instructions for parents and third parties after ‘Access Code’ is created.

Share My Information is accessible on the “Money Matters” tab of the student’s my.calpoly.edu portal in the portlet displayed below:

Share My Information



Would you like to give someone electronic access to information regarding your financial or academic information?

[Share my information](#)

Why Share My Information?

- Give access to parents or others to view your student account or financial aid information
- Allow scholarship donors access to your financial and academic information

- Displayed below is a sample of the information available through Share My Information based upon selections made by the student during the creation of the Access Code.

WebVerify
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Office
Registr

Cal Poly Online Verification
Report Generated: 08/11/2011 14:41:32

The University is fully accredited by the Western Association of Schools and Colleges. [Print this page](#)

Name	
Home Address	
Home Phone Number	
Email Address	
Date of Birth	
Beginning and Ending Dates of Attendance	Fall 2007 to Fall 2011
Residence Status	Resident
Class Level	Senior
Cal Poly Cumulative GPA	
Higher Ed GPA	
Payment Summary	

Student Account Balance		Most Recent Payments	
Registration & Other Fees	\$2,597.00	06/24/2010	\$ 55.00
Housing & Dining	\$0.00	06/23/2009	\$ 6.00
		01/12/2009	\$ 4.00
		06/10/2008	\$ 4.00
TOTAL	\$2,597.00	01/29/2008	\$ 4.00

Registration and Tuition fees are charged per quarter. Housing & Dining fees are charged annually. [For more info view How & When to Pay.](#)

[Make A Payment](#) [View Balance by Term](#)

Accepted Aid Remaining (Current aid year and next Fall)		Most Recent Financial Aid Postings	
Fall 2011	\$ 2,691.00	05/03/2011	\$ 1,333.00
Winter 2012	\$ 2,691.00	03/31/2011	\$ 1,066.00
Spring 2012	\$ 2,690.00	03/21/2011	\$ 1,480.00
		02/11/2011	\$ 1,333.00
		12/27/2010	\$ 2,547.00

*Note: Accepted Aid is reduced for amounts already disbursed or other adjustments, and assumes that all of the financial aid requirements to receive the funds are met. Note that accepted aid for next Fall cannot be applied to charges in the current academic year.

The CSU makes every effort to keep student costs to a minimum. Fees listed in published schedules or student accounts may need to be increased when public funding is inadequate. Therefore, CSU must reserve the right, even after initial fee payments are made, to increase or modify any listed fees, without notice, until the date when instruction for a particular semester or quarter has begun. All CSU listed fees should be regarded as estimates that are subject to change upon approval by The Board of Trustees.

Undergraduate Program Bachelor of Science with a major in Chemistry (Active in Program)	
Type of Degree	Bachelor of Science
Major	Chemistry
Minor	No minor listed
Concentration	No concentration listed
Official Graduation Date	Degree not yet awarded
Anticipated Graduation Date	Student has not applied for graduation
Honors	No honors listed
Completion of GWR	Not Complete

Undergraduate Program Bachelor of Science with a major in Chemistry (Dismissed)	
Type of Degree	Bachelor of Science
Major	Chemistry
Minor	No minor listed
Concentration	No concentration listed
Official Graduation Date	Degree not yet awarded
Anticipated Graduation Date	Student has not applied for graduation
Honors	No honors listed
Completion of GWR	Not Complete

[Financial Aid Award Year 2008](#) [\[Toggle \]](#)

[Financial Aid Award Year 2009](#) [\[Toggle \]](#)

[Financial Aid Award Year 2011](#) [\[Toggle \]](#)

[Financial Aid Award Year 2012](#) [\[Toggle \]](#)

Student Memo:

[View Historical Enrollment Information](#)

View Financial Aid Award detail by clicking on the links for each award year.

Financial Aid Award Year 2012

Awards

Term	Award	Offered Amount
Fall 2011	GRNT Federal Pell	\$ 867.00
	GRNT State Cal Grant A Fees	\$ 1,824.00
	JOB Federal Work Study	\$ 1,000.00
	LN Fed Direct Parent PLUS Loan	\$ 1,639.00
	LN Fed Stafford Sub Direct Ln	\$ 1,833.00
	LN Fed StaffordUnsub Direct Ln	\$ 667.00
Winter 2012	GRNT Federal Pell	\$ 867.00
	GRNT State Cal Grant A Fees	\$ 1,824.00
	JOB Federal Work Study	\$ 1,000.00
	LN Fed Direct Parent PLUS Loan	\$ 1,639.00
	LN Fed Stafford Sub Direct Ln	\$ 1,833.00
	LN Fed StaffordUnsub Direct Ln	\$ 667.00
Spring 2012	GRNT Federal Pell	\$ 866.00
	GRNT State Cal Grant A Fees	\$ 1,824.00
	JOB Federal Work Study	\$ 1,000.00
	LN Fed Direct Parent PLUS Loan	\$ 1,638.00
	LN Fed Stafford Sub Direct Ln	\$ 1,834.00
	LN Fed StaffordUnsub Direct Ln	\$ 666.00

To Do List

- Loan Rights & Responsibilities
- Master Promissory Note-Parent
- Stafford Entrance Counseling
- Master Promissory Note-Stdnt
- 11/12 Parent PLUS Loan


- **Step by step instructions for students to create an Access Code.**

Step 1. Login to your my.calpoly.edu portal and click on the Money Matters tab.

The screenshot shows the My Cal Poly Portal interface. The navigation bar includes Home, Academics, **Money Matters** (circled in red), Personal Info, Housing, Library, and CMS. A callout box on the right contains the text: "Login to your my.calpoly.edu portal and click on the Money Matters tab." The main content area is divided into several sections: "Important Financial Dates" with "Registration-related Dates" for Summer and Fall Quarters 2013; "Payment Summary" with a "Make A Payment Now" button and a "STUDENT ACCOUNT BALANCE" of \$0.00; and "Financial Aid & Scholarship" with various links and helpful forms. A sidebar on the left contains icons for various services like registration, housing, and dining.

Step 2. On the Money Matters tab you will find the Share My Information portlet. Click on the “Share my information” link.

Share My Information



Would you like to give someone electronic access to information regarding your financial or academic information?

[Share my information](#)

Why Share My Information?

- Give access to parents or others to view your student account or financial aid information
- Allow scholarship donors access to your financial and academic information

Click “Share my information”.

Step 3. Click “Create a new access code.”

Share My Information

← R



Share My Financial or Academic Information

Give someone electronic access to your financial or academic information. Select items you want others to view.

[Create a new access code](#)

Access Codes

No one currently has access to your information.

Request Access History

[Click here to view access history information](#)

Click on
“Create a new
access code.”

Step 4. Enter a nickname for the Access Code (such as 'mom' or 'dad') . Choose the specific information you want your parent or third party to have view access to. For financial information make sure to check the "Payment Summary" box. We recommend changing the expiration date to December 31st of the expected year of graduation for parent Access Codes.



New Access Code Creation

PLEASE NOTE: When you create a access code the system will show the most current information for the fields i.e. your overall GPA may change after grades come out and this system will show the most current value.

Nickname:

Choose the specific information the third party will have access to by checking the appropriate boxes.

- Name
- Home Phone Number
- Date of Birth
- Residence Status
- Col Poly Cumulative GPA
- Payment Summary

Financial Aid Information

- Award
- To Do List

Select Aid Year(s) to view (hold CTRL)

All Years:

Undergraduate Program Bachelor of Science with a major in Chemistry (Dismissed)

- Type of Degree
- Minor
- Official Graduation Date
- Honors

Undergraduate Program Bachelor of Science with a major in Chemistry (Active in Program)

- Type of Degree
- Minor
- Official Graduation Date
- Honors
- Historical Dates of Attendance

When displaying *Historical Dates of Attendance*, select the terms for which you would like your GPA to be shown (hold CTRL to select multiple)

All Terms:

Important: Term GPA will show for selected terms only.

Expires:

Note: Change expiration date to desired date. For parent access, we recommend December 31st of the expected year of graduation.

Expires: 9/11/2011						
September						
S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8
2010	2011	2012				

Home Address

Email Address

Beginning and Ending Dates of Attendance

Class Level

Higher Ed GPA

Budget

Major

Concentration

Anticipated Graduation Date

Completion of GWR

Enter any Notes or Special Instructions for the Requestor (i.e. Insurance Policy Number, etc)

By inserting a reference note, you will allow the third party to link your information to a specific account or policy number and the note will help to track the third party user's history.

Step 5. Enter email address of parent or third party and any desired message. Click send and an email will be sent to notify your parent or third party of the new access code created. Sender's email address will be your Cal Poly email.

The key was successfully created. You may now choose to send the key or press the Don't Send/Cancel button

Send Access Code

Fill out this form to have your key emailed to somebody

From:

To: Enter email addresses here (1 on each line)
Note: A single email is sent to each name listed.

Subject: My Cal Poly Information: Access Code

Preset Message: I have created a special code for you to access my information, all you need to do is

1. Go to web site listed below under Web Verify System:
2. Login with your email address and password you've selected or create a new account if this is your first time
3. After login enter the access code shown below into the box labeled "Access Code:"
4. Click the "Search" button

Access Code:
Web Verify System: <http://webverify.calpoly.edu/WVApp>

Additional Text: Enter any other additional message here

When finished click "Send." The access code setup is completed. An email will be sent to your parent or third party.

Send Don't Send

Access Code creation is complete!

- **Login instructions for parents and third parties after Access Code is created.**

Once a Share My Information Access Code has been created by the student through the student's my.calpoly.edu portal, an email from the student's Cal Poly email address will be sent to the parent's or third party's email address (as entered by student during creation of the access code).

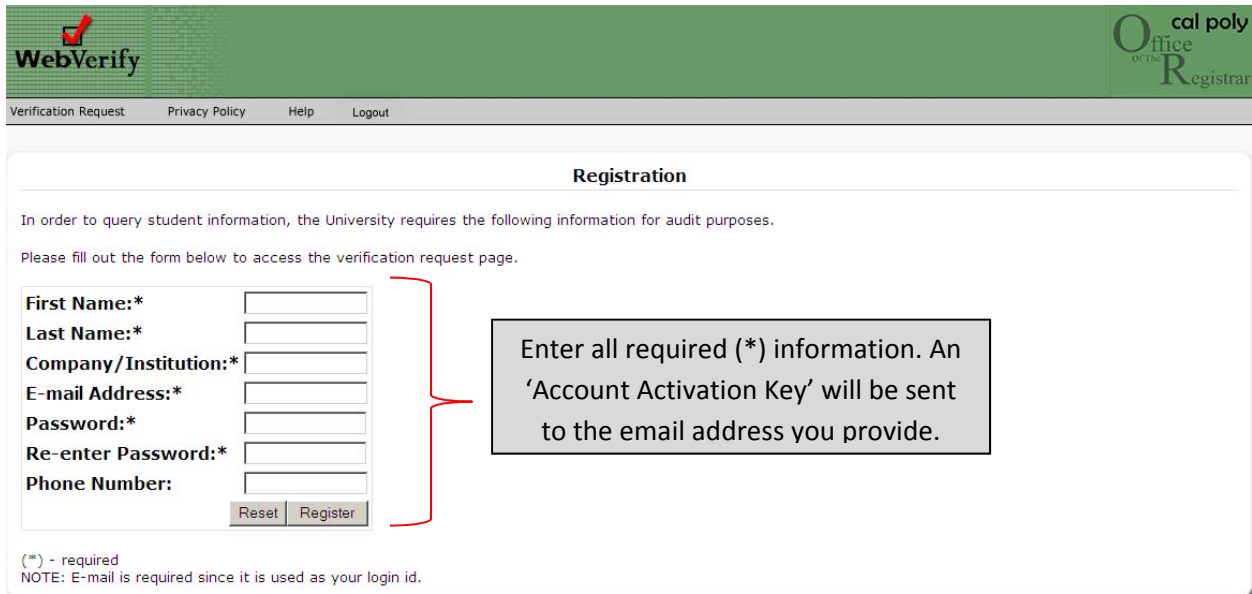
Click on the Web Verify link contained in the email or as provided here: <https://webverify.calpoly.edu/WVApp> . Have the email you received available for reference or make note of the Access Code.

NOTE - The first time you login to Web Verify you must register yourself as a user as shown in Steps 1 through 3.

Step 1. First time users must register.

The screenshot shows the WebVerify login interface. At the top, there is a green header with the WebVerify logo on the left and the Cal Poly Office of the Registrar logo on the right. Below the header is a navigation bar with links for Verification Request, Privacy Policy, Help, and Logout. The main content area is titled "Log in" and contains a form with "E-mail:" and "Password:" labels, each followed by a text input field. A "Login" button is positioned to the right of the password field. A red circle highlights the word "here" in the text "New user? Click here to register." A red arrow points from this circle to a grey box containing the text "Click on 'here' to register the first time." Below the form, there is a "Note:" section stating that students do not need an account and can log in through my.calpoly.edu. At the bottom, there is a link to contact the webmaster and a copyright notice for 2010 Cal Poly Office of the Registrar.

Step 2. Enter your information as required and click 'Register'. You will receive a second email with an Account Activation Key. This email will be sent by noreply@calpoly.edu.



Registration

In order to query student information, the University requires the following information for audit purposes.

Please fill out the form below to access the verification request page.

First Name:*

Last Name:*

Company/Institution:*

E-mail Address:*

Password:*

Re-enter Password:*

Phone Number:

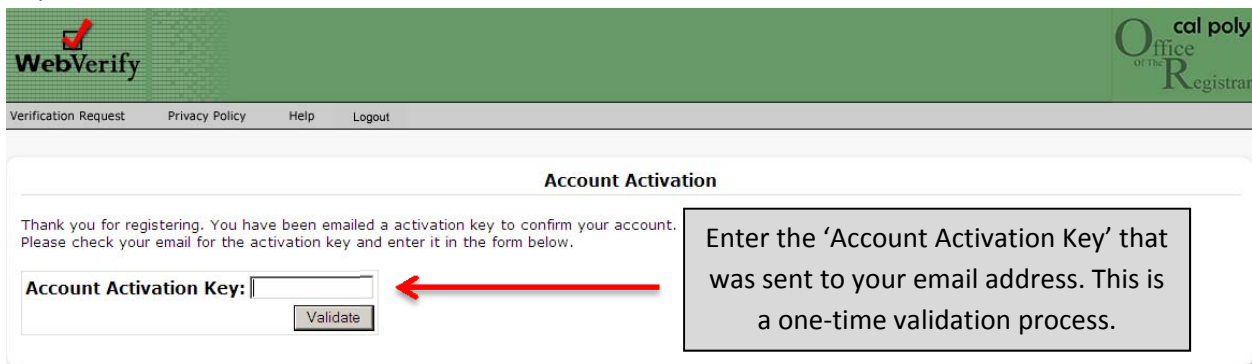
Enter all required (*) information. An 'Account Activation Key' will be sent to the email address you provide.

(*) - required
NOTE: E-mail is required since it is used as your login id.

Contact the [webmaster](#).

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Step 3. Follow link and instructions in email from noreply@calpoly.edu and enter the Account Activation Key.



Account Activation

Thank you for registering. You have been emailed a activation key to confirm your account. Please check your email for the activation key and enter it in the form below.

Account Activation Key:

Enter the 'Account Activation Key' that was sent to your email address. This is a one-time validation process.

Contact the [webmaster](#).

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Step 4. To login to Web Verify, enter your email address and password you created in Step 2.

WebVerify

cal poly
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of the
Registrar

Verification Request Privacy Policy Help Logout

Log in

SUCCESS: Your account has been activated. Please login to continue.

E-mail:

Password:

Login

New user? Click [here](#) to register.

Note: Students don't need an account; simply log in through my.calpoly.edu and click 'view report' in your Web Verify channel.

If you forgot your password, click [here](#) to recover it.

Note: The login page shown above, is the main login page to Web Verify <https://webverify.calpoly.edu/WVApp> . A link to this page was provided in the first email sent to you from the student's Cal Poly email address .

Step 5. Enter the Access Code that was sent to you in the first email. If you cannot locate the email or Access Code, the student can assist you as the Access Code is noted on the **Money Matters Tab** of your student's my.calpoly.edu portal.

WebVerify

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Verification Request Privacy Policy Help Logout

Automated Student Verification Request

This automated system will allow you to query student enrollment data using an access code provided to you by a student. If you need an access code, obtain it by contacting the student directly.

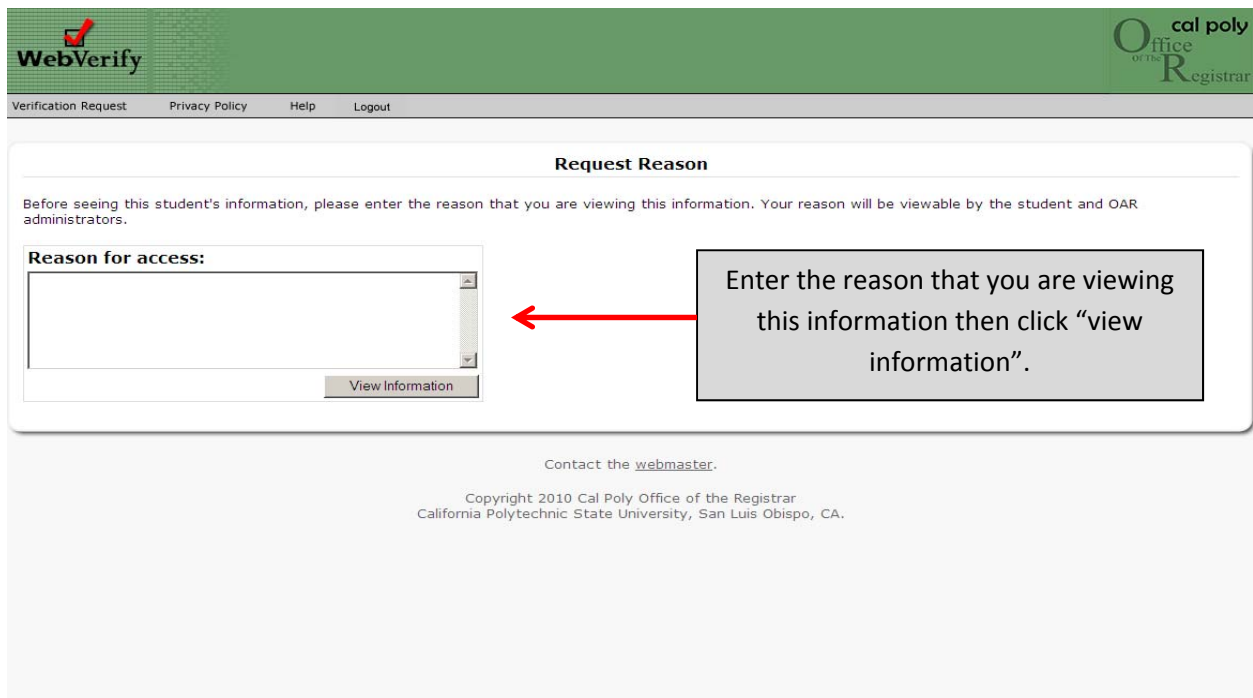
Access Code: (student provided)

Search

Contact the [webmaster](#).

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Step 6. You are required to enter your reason for viewing the student's information each time you login. Your reason will be viewable by the student and Cal Poly's ITS. Your reason may simply be 'checking account balance'.



The screenshot shows the WebVerify interface. At the top, there is a green header with the WebVerify logo on the left and the Cal Poly Office of the Registrar logo on the right. Below the header is a navigation bar with links for Verification Request, Privacy Policy, Help, and Logout. The main content area is titled "Request Reason" and contains the following text: "Before seeing this student's information, please enter the reason that you are viewing this information. Your reason will be viewable by the student and OAR administrators." Below this text is a text input field labeled "Reason for access:" and a "View Information" button. A red arrow points from a grey annotation box on the right to the input field. The annotation box contains the text: "Enter the reason that you are viewing this information then click 'view information'". At the bottom of the page, there is a footer with the text: "Contact the [webmaster](#). Copyright 2010 Cal Poly Office of the Registrar California Polytechnic State University, San Luis Obispo, CA."

For future logins you will need your email address, password, and Access Code.