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 Portlet](image-url)
- 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.

View Financial Aid Award detail by clicking on the links for each award year.
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.
Step 2. On the Money Matters tab you will find the Share My Information portlet. Click on the “Share my information” link.
Step 3. Click “Create a new access code.”

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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.

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

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

Important: Term GPA will show for selected terms only.

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.

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

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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](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.**
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.

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

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

Enter the ‘Account Activation Key’ that was sent to your email address. This is a one-time validation process.
Step 4. To login to Web Verify, enter your email address and password you created in Step 2.

![Web Verify login page]

Enter your e-mail address and password.

Note: The login page shown above, is the main login page to Web Verify [https://webverify.calpoly.edu/WVApp](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.

![Web Verify access code entry]

The Access Code must be entered here. It is provided in the first email from the student when the Access Code was created.
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’.

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