

# Post View Proxy User Access



Information Technology  
& Cadet Accounting

1 May 2023



# Logging into Post View



- Click MYVMI from VMI website or
- go directly to <https://my.vmi.edu/> - Click on Post View or
- go directly to <https://postview.vmi.edu/>



# Protecting your User ID

- Sharing your User ID and password is not authorized.
- Rather than sharing your User ID and password, you will be allowed to designate authorized proxy (formerly bill payer).
- Proxy may access your billing information in Post View.
- Designate a proxy for financial functions **only** if someone other than yourself will need to view or pay the bill.
- Note: Becoming a proxy does not authorize release of information either verbal or written (see FERPA release).



# Post View Home Page

Back to VMI.edu

## VMI Post View

Post View is Virginia Military Institute's internal system used to process admissions applications, manage cadet billing, register for classes, and employee benefits information.



To start the log in process, and designate a Proxy User, the cadet will need to choose “Login Using your VMI Network Account” in the Cadet box.

Applicant	Cadet	Employee, Faculty	Proxy
<p>To begin the VMI application, you will first need an applicant account. Visit the <a href="#">VMI Apply page</a> for full instructions on starting and completing the application process.</p> <p>If you have received your VMI applicant account UserID and password via email, you are able to access to the VMI application portal.</p> <p>To login, your UserID must be followed by <a href="#">@mail.vmi.edu</a> on the authentication page.</p> <p><a href="#">Login Using your VMI Applicant Account</a></p>	<p>You must use your VMI Network UserID and your NETWORK password to login. This is NOT necessarily your email password.</p> <p>Your VMI Network UserID must be followed by <a href="#">@mail.vmi.edu</a> on the authentication page.</p> <p><a href="#">Login Using your VMI Network Account</a></p>	<p>You must use your VMI Network UserID and the same password as your email to login</p> <p>Your VMI Network UserID must be followed by <a href="#">@vmi.edu</a> on the authentication page.</p> <p><a href="#">Login Using your VMI Network Account</a></p>	<p>You must have the UserID created when your Cadet set up your Proxy access.</p> <p>Your password was sent in a separate email when the UserID was created.</p> <p><a href="#">Login Using your VMI Proxy Account</a></p>

Cadets log in here





# Authentication page



Virginia Military Institute

Sign in

Sign in

**Applicant:** Log in using the UserID and password provided in the VMI account confirmation email from VMI Admissions. Be sure to include @mail.vmi.edu after your provided UsersID (i.e. smithjd27@mail.vmi.edu)

**Current Cadet:** Log in with your VMI email address (i.e. smithjd26@mail.vmi.edu) as the user name, and your Post View/Canvas password. **Class of 2027 log in using your VMI email address (i.e. smithjd27@vmi.edu) and password.**

**Employee:** Log in using your VMI email address (i.e. smithjd@vmi.edu) and password.

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- The link will take you to the VMI authentication/login page where you will need your full VMI network credentials.
- Cadets:  
Enter “user name” followed by **@mail.vmi.edu**  
Enter your VMI Network password – this may not be the same as your email password.
- Class of 2027:  
Log in using your VMI email address (i.e. smithjd27@vmi.edu) and password.



# Post View Processes

The screenshot shows the 'Post View' dashboard interface. At the top, there is a navigation bar with the 'Post View' title, a user profile icon, and links for 'Sign out' and 'Help'. Below the navigation bar, a welcome message reads 'Hello, Welcome to VMI Post View!' followed by the instruction 'Choose a category to get started.' The main content area is a grid of ten category tiles, each with an icon and a brief description:

- Student Finance**: Here you can view your latest statement and make a payment online.
- Financial Aid**: Here you can access financial aid data, forms, etc.
- Tax Information**: Here you can change your consent for e-delivery of tax information.
- Employee**: Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.
- Student Planning**: Here you can search for courses, plan your terms, and schedule & register your course sections.
- Course Catalog**: Here you can view and search the course catalog.
- Grades**: Here you can view your grades by term.
- Program Evaluation and Graduation**: Here you can view and submit a graduation application.
- Academic Attendance**: Here you can view your attendances by term.
- Cadet**: Here you can view cadet specific options.

At the bottom of the dashboard, there is a footer with the copyright notice: '© 2000-2023 Ellucian Company L.P. and its affiliates. All rights reserved. [Privacy](#)'.

- Upon a successful login, only items that have been assigned to that user will be available.





# Designate an Authorized Proxy

A screenshot of the VMI Post View user interface. The interface is dark-themed with a sidebar on the left and a main content area. The sidebar has a 'User Options' menu item highlighted in blue, with a red circle around its user icon. A red arrow points from this icon to a dropdown menu that is open, showing options like 'User Profile', 'Emergency Information', 'View/Add Proxy Access', 'Account Preferences', and 'Required Agreements'. Another red circle highlights the 'View/Add Proxy Access' option in this menu. A second red arrow points from this option to a similar dropdown menu in the top right corner of the page, which is also open and has 'View/Add Proxy Access' highlighted with a red circle. The main content area shows a welcome message and several service tiles for Student Finance, Tax Information, Student Planning, Grades, Academic Attendance, Financial Aid, Employee, Course Catalog, Program Evaluation and Graduation, and Cadet. A copyright notice is visible at the bottom of the page.

- Click on either user option to display a drop-down menu
- Click on “View/Add Proxy Access”



# Adding a Proxy

The screenshot shows the 'Post View' interface for 'View/Add Proxy Access'. The page is titled 'View/Add Proxy Access' and contains three main sections:

- \*\*\*\*\* Proxy User Access \*\*\*\*\***: A blue informational box explaining that proxy users can interact with the system. It states that only users with a documented personal relationship can be designated as a proxy user. Required documentation includes the person's name, current address, type of relationship, and current email address. Users with these relationships may be enabled to allow access to review their Student Finance Information (Account Activity, Make A Payment, Tax Information, General Notifications, Academics, and Financial Aid Information). It also notes that users can select which information to share on a per-user basis. A contact link for the VMI Help Desk at 540-464-7643 is provided.
- Active Proxies**: A blue informational box stating that the user does not have any designated proxies and that they should add one now to allow another self-service user to view or edit their account.
- Add a Proxy**: A blue informational box providing instructions on how to add a proxy. It states that proxy access can be provided to a person with a documented personal relationship. Required documentation includes the person's name, current address, type of relationship, and current email address. It instructs the user to choose a person from a drop-down list to start the process. It also mentions that if the desired user is not in the list, the user should complete the 'Proxy User Setup (CMP21)' form to have desired users made available. A contact link for the VMI Help Desk at 540-464-7643 is provided.

At the bottom of the page, there is a 'Select a Proxy' dropdown menu with the text 'Please Select' and a downward arrow.

- The first paragraph explains the proxy user process
- The Active Proxies area displays any current designated proxies
- The Add a Proxy area displays instructions for adding a proxy or the necessary steps to complete to have an individual made available to add as a proxy.



# Reviewing Active Proxy

Active Proxies			
Name	Proxy Access	Relationship	Effective Date
	Student Finance	Parent	5/26/2022 

- If a proxy has already been designated, they will show in the Active Proxies section
- Cadets can click the pencil to edit and review proxy details

### Edit Proxy Details

Name 

Email Address  Relationship Parent

Access

Allow Complete Access

Allow Select Access

Remove All Access

<input type="checkbox"/> Student Finance 	<input type="checkbox"/> Financial Aid 
<input type="checkbox"/> Account Activity	<input type="checkbox"/> Offer Letter
<input type="checkbox"/> Account Summary	<input type="checkbox"/> Financial Aid Home
<input checked="" type="checkbox"/> Make a Payment	<input type="checkbox"/> My Awards
	<input type="checkbox"/> FA Required Documents

Cancel Save



# Adding a Proxy

## Add a Proxy

You may provide proxy access to a person with a Virginia Military Institute documented personal relationship to you in the Institute's Student system. Required documentation includes the person's name, current address, type of relationship and current email address. Choose a person shown in the drop down list below to start the process. In the next step you will then choose the specific types of access "you" desire be assigned to the selected person.



If a user you desire does not show in the list, please complete the [Proxy User Setup \(CMP21\)](#) form to have desired users made available for you to complete the View/Add Proxy Access creation process. You will be notified by email after the form has been processed. You will then be able to select users and designate their appropriate proxy access.

If you have any questions about completion of the form, please contact the [VMI Help Desk](#) at 540-464-7643.

Select a Proxy

Please Select

- To view current eligible family members, click the “Select a Proxy” drop down
- If you wish to add a proxy that isn't listed, select the “Proxy User Setup (CMP21)” link. Cadets will complete a form and cadet accounting will enter the information. Allow 48 hours for the person to be added. The cadet will receive an email when the process has been completed.



# Example Proxy Options

[Redacted] v

Email Address: [Redacted] Relationship: Brother

Access

Allow Complete Access

Allow Select Access

<input type="checkbox"/> <b>Student Finance</b> ⓘ	<input type="checkbox"/> <b>Financial Aid</b> ⓘ
<input type="checkbox"/> Account Activity	<input type="checkbox"/> Offer Letter
<input type="checkbox"/> Account Summary	<input type="checkbox"/> Financial Aid Home
<input type="checkbox"/> Make a Payment	<input type="checkbox"/> My Awards
	<input type="checkbox"/> FA Required Documents
	<input type="checkbox"/> College Financing Plan
<input type="checkbox"/> <b>General</b> ⓘ	<input type="checkbox"/> <b>Academics</b> ⓘ
<input type="checkbox"/> Notifications	<input type="checkbox"/> Grades
<input type="checkbox"/> Required Documents	
<input type="checkbox"/> <b>Tax Information</b> ⓘ	
<input type="checkbox"/> Tax Information	

- Choose the access desired for this specific proxy user. You may have multiple proxies, and each can be provided different types of access.



# Proxy Disclosure Agreement

## Disclosure Agreement

\*\*\*\*\* NOTICE \*\*\*\*\*

You are designating access to information that is protected by Federal Privacy Law. Disclosure to unauthorized parties violates the Family Educational Rights and Privacy Act (FERPA). You should not attempt to proceed unless you are specifically authorized to do so and are informed about FERPA. When accessing the system, your designee must access only that information needed to complete the assigned or authorized tasks. You may designate this access only to other parties authorized to have access in accordance with the provisions of FERPA. Information pertaining to VMI's FERPA policies can be found at the following web address:

[VMI Ferpa Policy](https://www.vmi.edu/ferpa) OR key in: <https://www.vmi.edu/ferpa>

If you have any questions about FERPA or the appropriate release of information, please contact COL Janet Battaglia, Registrar, at 540-464-7213.

I authorize the institution to disclose my information to this party

Cancel

Save

- Once you have chosen the proxy options, read the disclosure message, check the box and click save. This will send emails to the proxy at the email address associated in the VMI system to the proxy user. The proxy will receive one email with username and another email with password.
- The Proxy will log in with their new credentials and follow the same procedures as cadets to make a payment.



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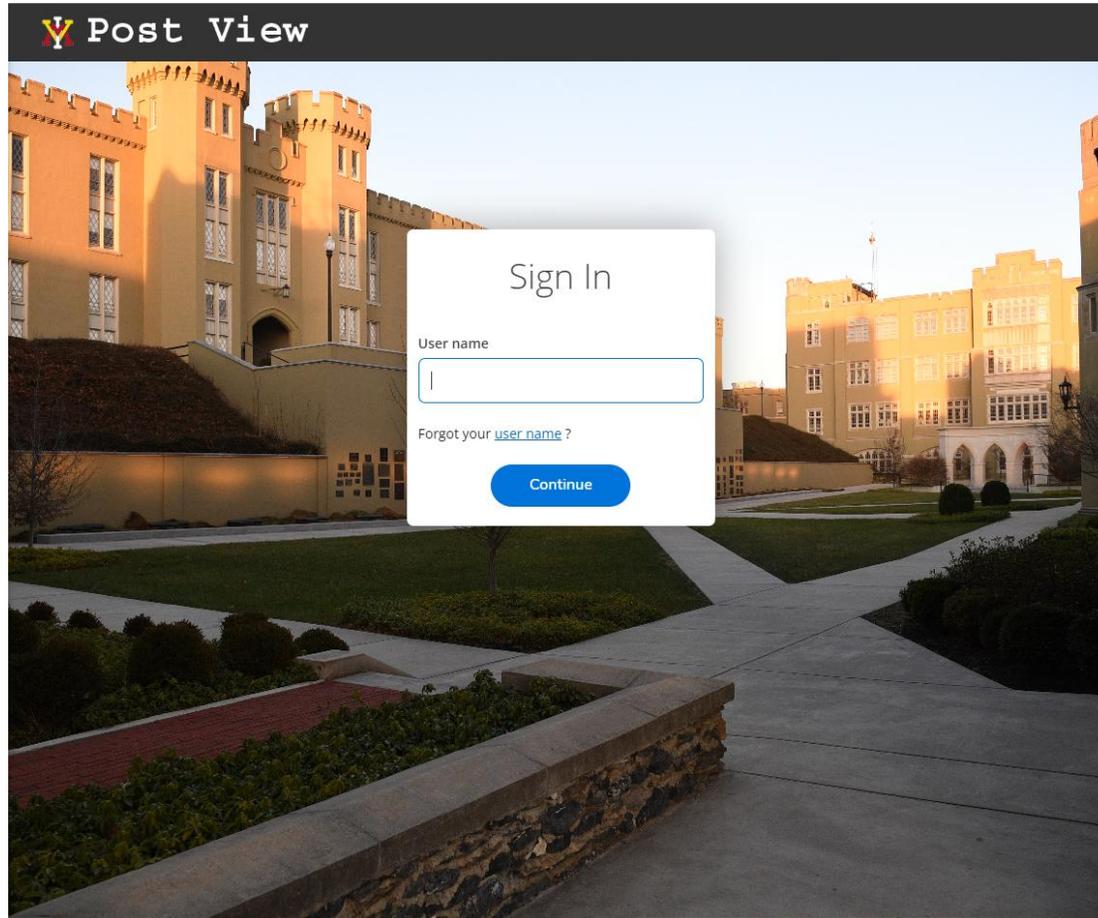
After the cadet has granted Proxy Access the Proxy User will start the log in process by choosing “Login Using your VMI Proxy Account” in the Proxy box.

Proxy Users login here





# Sign In Page

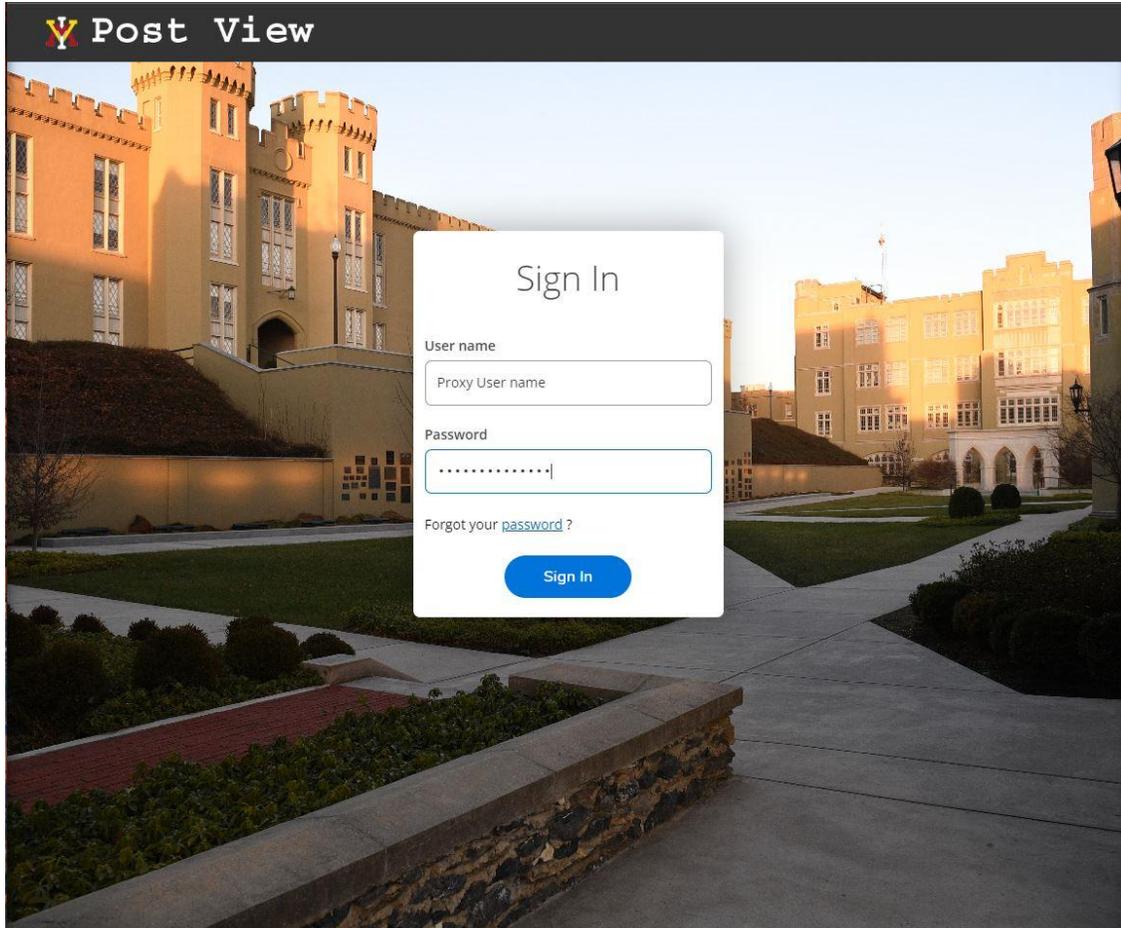


- You will then need to enter your assigned “User name” on this screen.
- The User name is sent by email after the cadet designates Proxy Access.





# Proxy User Sign In



- Proxy Users will be requested to supply their password on this page.
- A separate email is sent that contains the temporary password after the cadet has designated Proxy Access. The Proxy User will be prompted to change this password during the first Sign In.





# Proxy User Choices When Logging In

Person Proxy

Select the cadet you want to view and press Continue:

[Unselected Cadet 1] [Unselected Cadet 2]

Continue

- Upon login by the proxy user, they will be presented a choice of whom they would like to work with. If a proxy for more than one cadet, each cadet will be listed.

- Choose the cadet's name and select Continue to be provided options to act on behalf of that cadet.

Person Proxy

Select the cadet you want to view and press Continue:

[Selected Cadet 1] [Unselected Cadet 2]

Continue





# Proxy User Acting on Behalf

The screenshot shows the 'Post View' interface of the VMI system. At the top, there is a dark navigation bar with the 'Post View' title, a user profile icon, and links for 'Sign out' and 'Help'. Below this is a green banner indicating the user is acting on behalf of another user, with a 'Change User' button. The main content area features a welcome message: 'Hello, Welcome to VMI Post View! Choose a category to get started.' Below the message are four category tiles: 'Student Finance' (with a dollar sign icon), 'Financial Aid' (with a document icon), 'Tax Information' (with a document icon), and 'Grades' (with a book icon). Each tile includes a brief description of the available actions. At the bottom, a footer contains the copyright notice: '© 2000-2022 Ellucian Company L.P. and its affiliates. All rights reserved. [Privacy](#)'.

- The proxy user will be provided options to act on behalf of that cadet.
- Specific options available to the proxy user are dependent on what the cadet chose while setting the proxy user up.



# FERPA Release

In accordance with the Family Educational Rights and Privacy Act (FERPA) cadets must designate authorized individuals who can be given information and the type of information to be provided by the **Cadet Accounting and Financial Aid Office.**

- Complete FERPA & e-Commerce Sheet in Etrieve
- Required prior to registration
- Completed annually



# To access FERPA/e-Commerce

- An Ecommerce-FERPA hold is placed on cadet's accounts each fall
- Cadet's will receive an email annually with a link to an retrieve FERPA form
- Once the form is completed the hold will be removed within 24 hours allowing cadets to register
- When a family member calls or visits cadet accounting or financial aid the FERPA form will be checked to confirm you have authorized information to be released



# Contact Information

- Additional information concerning your bill and payment options can be found on our website [www.vmi.edu/cadetaccounting.](http://www.vmi.edu/cadetaccounting)

Cadet Accounting Office 540-464-7217

Email: **cadetaccounting@vmi.edu**



# Contact Information

- Additional information concerning Information Technology at VMI can be found on our website [www.vmi.edu/about/offices-a-z/it/](http://www.vmi.edu/about/offices-a-z/it/)

Information Technology 540-464-7643

Email: **help@vmi.edu**