

# VIEWING and Uploading a FERPA DOCUMENT STAFF JOB AID

## Overview:

Staff members may now view and upload FERPA documents for students through the Campus Community section of the student's record.

Students also can now upload their FERPA document (as well as other documents) on their To Do List from the comforts of their homes or any other place that is convenient for them. This new process eliminates the need for students to wait in lines to submit documents in order to resolve items on their To Do List.



1. To View a previously uploaded FERPA document:
  - a. Navigate to **Main Menu>Campus Community>Checklists> Person Checklists> Person Checklist Detail**.
  - b. Enter the ID for the Student.
  - c. Click "Search".

### Person Checklist Detail


Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

<b>ID:</b>	begins with ▼	<input type="text"/>	
<b>Sequence Number:</b>	= ▼	<input type="text"/>	
<b>Administrative Function:</b>	begins with ▼	<input type="text"/>	
<b>Checklist Code:</b>	begins with ▼	<input type="text"/>	
<b>National ID:</b>	begins with ▼	<input type="text"/>	
<b>Campus ID:</b>	begins with ▼	<input type="text"/>	
<b>Last Name:</b>	begins with ▼	<input type="text"/>	
<b>First Name:</b>	begins with ▼	<input type="text"/>	

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

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d. Select the FERPA record to view.

NOTE: The first FERPA item is most likely the uploaded FERPA form to be viewed. However, you should verify that the correct document is selected by reviewing each.

e. Click on a FERPA item and continue.

### Person Checklist Detail

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

ID:	begins with ▼	<input style="width: 95%;" type="text"/>
Sequence Number:	= ▼	<input style="width: 95%;" type="text"/>
Administrative Function:	begins with ▼	<input style="width: 95%;" type="text"/>
Checklist Code:	begins with ▼	<input style="width: 95%;" type="text"/>
National ID:	begins with ▼	<input style="width: 95%;" type="text"/>
Campus ID:	begins with ▼	<input style="width: 95%;" type="text"/>
Last Name:	begins with ▼	<input style="width: 95%;" type="text"/>
First Name:	begins with ▼	<input style="width: 95%;" type="text"/>

Case Sensitive

Search
Clear
Basic Search
Save Search Criteria

#### Search Results



View All First 4 1-2 of 2 ▶ Last

ID	Administrative Function	Checklist Code	National ID Country	NID Short Description	National ID	Date of Birth	Gender	Name	Campus ID	Last Name	First Name
<input style="width: 100%;" type="text"/>	STRM	FERPA	USA	SSN	*****	**/**/****					
<input style="width: 100%;" type="text"/>	STRM	FERPA	USA	SSN	*****	**/**/****					

# VIEWING and Uploading a FERPA DOCUMENT STAFF JOB AID

- f. Click on the "Checklist Detail 2" tab.
- g. Click on "View Document".

[Checklist Detail 1](#) **Checklist Detail 2**

ID:   

**Checklist Date Time:** 06/13/2014 3:40:03PM

**Administrative Function:** Student Term **Status:** Initiated

**Academic Institution:** University of Houston **Status Date:** 06/24/2014

**Checklist Code:** Record Release Authorization **Due Date:** 01/01/9999

**Checklist Item Table**

Sequence	Item	RecRelse	Status	Status Date	Due Date
100	FERPA	RecRelse	Received	06/24/2014	01/01/9999

**Responsible ID:** 0783354 **Name:** Mantell,Michael Wynton

**Document Uploaded** Yes

[Checklist Detail 1](#) | [Checklist Detail 2](#)

# VIEWING and Uploading a FERPA DOCUMENT STAFF JOB AID

h. View the "Authorization To Release Educational Records" (a.k.a. FERPA) form.

Form No. OGC-SF-2006-02

**AUTHORIZATION TO RELEASE EDUCATIONAL RECORDS**  
Family Educational Rights and Privacy Act of 1974 as Amended (FERPA)

I \_\_\_\_\_ hereby voluntarily authorize officials in the  
[Print Name of Student]  
University of Houston department(s) identified below to disclose personally identifiable information from my  
educational records. (Please check the box or boxes that apply):

- Registration and Academic Records
- Scholarships and Financial Aid
- Student Financial Services
- Undergraduate Scholars @ UH (formally USD)
- University Advancement
- Dean of Students Office
- Other (Please Specify) \_\_\_\_\_

Specifically, I authorize disclosure of the following information or category of information. (Please check the box or  
boxes that apply):

- Grades/Transcripts
- Financial Aid
- Disciplinary
- Housing
- Scholarship and/or Honors
- Photos
- Academic Records
- All University Records
- Billing
- Other (Please Specify) \_\_\_\_\_

This information may be released to: \_\_\_\_\_  
[Print Name(s) of Individual(s) To Whom University May Disclose Information]

\_\_\_\_\_ for the purpose of informing:  
[List Additional Individuals if Necessary]

- Family
- Educational Institution
- Honor or Award
- Employer/Prospective Employer
- Public or Media of Scholarship
- Other (Please Specify) \_\_\_\_\_

Please provide a password to obtain information via the phone: \_\_\_\_\_. The password  
should not contain more than ten (10) letters. You must provide the password to the individuals or agencies listed  
above. The University will not release information to the caller if the caller does not have the password. A new  
form must be completed to change your password.

**This is to attest that I am the student signing this form. I understand the information may be released  
orally or in the form of copies of written records, as preferred by the requester. This authorization will  
remain in effect from the date it is executed until revoked by me, in writing, and delivered to Department(s)  
identified above.**

\_\_\_\_\_  
Student Name (please print) PeopleSoft I.D. Number \_\_\_\_\_

\_\_\_\_\_  
Student Signature Date \_\_\_\_\_

Office of the General Counsel  
FERPA Authorization Form  
OGC-SF-2006-02 Revised 03.10.08  
Page 1 of 1

*Note: Modification of this Form requires approval of OGC*

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2. To Upload a FERPA document:
  - a. Navigate to **Main Menu>Campus Community>Checklists> Person Checklists> Person Checklist Detail**.
  - b. Enter the ID for the Student.
  - c. Click "Search".

### Person Checklist Detail

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

ID:	begins with ▼	<input type="text"/>	
Sequence Number:	= ▼	<input type="text"/>	
Administrative Function:	begins with ▼	<input type="text"/>	
Checklist Code:	begins with ▼	<input type="text"/>	
National ID:	begins with ▼	<input type="text"/>	
Campus ID:	begins with ▼	<input type="text"/>	
Last Name:	begins with ▼	<input type="text"/>	
First Name:	begins with ▼	<input type="text"/>	

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

## VIEWING and Uploading a FERPA DOCUMENT STAFF JOB AID

d. Select the FERPA record to view.

NOTE: The bottom FERPA item is the most likely item for uploading another FERPA form. However, you should verify that the correct document is selected by reviewing each.

e. Click on the FERPA item and continue.

### Person Checklist Detail

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

ID: begins with ▼

Sequence Number: = ▼

Administrative Function: begins with ▼

Checklist Code: begins with ▼

National ID: begins with ▼

Campus ID: begins with ▼

Last Name: begins with ▼

First Name: begins with ▼

Case Sensitive

Basic Search

#### Search Results

View All First 1 1-2 of 2 2 Last

ID	Administrative Function	Checklist Code	National ID Country	NID Short Description	National ID	Date of Birth	Gender	Name	Campus ID	Last Name	First Name
<input style="width: 20px; height: 20px;" type="checkbox"/>	STRM	FERPA	USA	SSN	*****	**/**/****					
<input style="width: 20px; height: 20px;" type="checkbox"/>	STRM	FERPA	USA	SSN	*****	**/**/****					

## VIEWING and Uploading a FERPA DOCUMENT STAFF JOB AID

- f. Click on Checklist Management 2 tab to locate the Record Release Authorization item with a Status of "initiated". You will also notice that the "Upload Document" button is highlighted and the "Document Uploaded" status is "No".
- g. Click "Upload Document".

Checklist Detail 1
Checklist Detail 2

Sergio Gutierrez
ID: 1022814

**Checklist Date Time:** 06/13/2014 3:40:03PM

**Administrative Function:** Student Term **Status:** Initiated

**Academic Institution:** University of Houston **Status Date:** 06/24/2014

**Checklist Code:** Record Release Authorization **Due Date:** 01/01/9999

**Checklist Item Table**

Sequence	Item	RecRelse	Status	Status Date	Due Date
100	FERPA	RecRelse	Initiated	06/23/2014	01/01/9999

**Responsible ID:** 0783354 **Name:** Mantell,Michael Wynton

Upload Document

View Document

**Document Uploaded** No

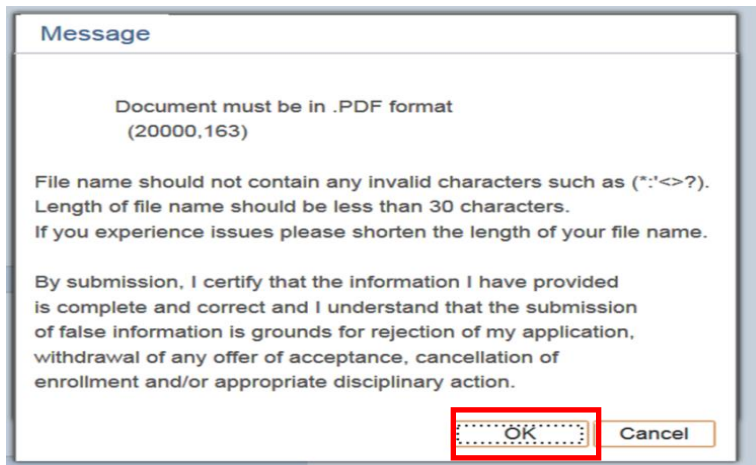
Save
 Return to Search
 Previous in List
 Next in List
 Notify

[Checklist Detail 1](#)
[Checklist Detail 2](#)

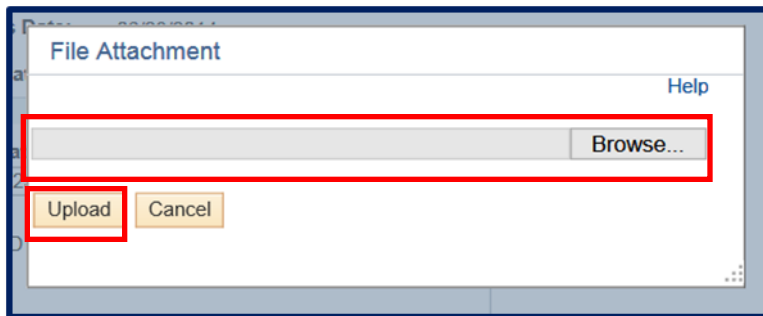
NOTE: All uploadable documents must be a PDF format. An electronic version of the FERPA form to be uploaded should already be saved. Please confirm the availability of the electronic form and that it is compliant with the upload naming conventions and file format requirements on the next page.

## VIEWING and Uploading a FERPA DOCUMENT STAFF JOB AID

- h. A “Message” window containing important file naming information will appear.  
NOTE: all FERPA forms to be uploaded MUST be saved as PDF files.
- i. Click “OK”.



- j. Browse to locate the correct FERPA form for the student and click “Upload”.



## VIEWING and Uploading a FERPA DOCUMENT STAFF JOB AID

k. You will be returned to the “Checklist Detail 2” page.

Checklist Detail 1
Checklist Detail 2

Sergio Gutierrez
ID: 1022814

**Checklist Date Time:** 06/13/2014 3:40:03PM

**Administrative Function:** Student Term
**Status:** Initiated

**Academic Institution:** University of Houston
**Status Date:** 06/24/2014

**Checklist Code:** Record Release Authorization
**Due Date:** 01/01/9999

**Checklist Item Table**

Sequence	Item	Status	Status Date	Due Date
100	FERPA RecRelse	Received	06/24/2014	01/01/9999

**Responsible ID:** 0783354      **Name:** Mantell,Michael Wynton

Upload Document
View Document

**Document Uploaded** Yes

Save
 Return to Search
 Previous in List
 Next in List
 Notify

[Checklist Detail 1](#) | [Checklist Detail 2](#)

l. Click on “View Document” to see the form and confirm it is correct.

**Checklist Item Table**

*Sequence	*Item	*Status	*Status Date	*Due Date
<input type="text" value="100"/>	<input type="text" value="FERPA"/>	RecRelse	<input type="text" value="06/16/2014"/>	<input type="text" value="01/01/9999"/>

**Responsible ID:**

**Name:** Stott,Anthony D

Upload Document
View Document

**Document Uploaded**