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COURSE OVERVIEW

What is Profile Information?

Within Web Grants 4 Students there is a profile information section. In this section the student will be able to view and directly update their contact information, and 3rd party representative information. Students will also be able to view their demographic information.

1 UPDATING PROFILE INFORMATION

Lesson Objectives:
- The student will learn how to update their ‘Contact Information’.
- The student will learn how to update their ‘Demographic information’.
- The students will learn how to add a 3rd Party Representative.

1.1 Expanding the ‘Welcome’ box

(Figure 1 – WebGrants for Students)

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The student will need to log into their WebGrants 4 Students account.</td>
<td>Log into WebGrants 4 Students</td>
</tr>
<tr>
<td>2.</td>
<td>Once logged in the student will see a ‘Welcome’ box (Figure 1) with their name, CSAC ID and a ‘Show More’ drop down option displayed. The student will need to click the ‘Show More’ drop down option to expand the box.</td>
<td>Click ‘Show More’</td>
</tr>
</tbody>
</table>

1.1.1 Key Points

- Log into WebGrants 4 Students.
- Click the ‘Show More’ drop down icon to expand the ‘Welcome’ box.
1.2 ‘Edit Profile’ Menu Access

(Figure 2 – WebGrants for Students)

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Once the student expands the ‘Welcome’ box (Figure 2) they will be able to view their currently saved profile information. If the student notices something is no longer valid or needs to make an update, they need to click the ‘Edit Profile’ button to access the ‘Edit Profile’ menu.</td>
<td>Click ‘Edit Profile’</td>
</tr>
</tbody>
</table>

1.2.1 **Key Points**

- Click the ‘Edit Profile’ button if you need to update or correct profile information.
1.3 Updating Contact Information

(Figure 3 – WebGrants 4 Students)  (Figure 4 – WebGrants 4 Students)

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>After the student clicks the ‘Edit Profile’ button the ‘Edit Profile’ menu (Figure 3) will pop up with the ‘Contact info’ tab selected as default. If the student needs to update their contact information all they need to do is type the updated information into the box and the outdated information will be overwritten (Example in Figure 4).</td>
<td>Type updated information into appropriate box.</td>
</tr>
<tr>
<td>2.</td>
<td>The student must then click ‘Save Changes’ or the information that they typed in will not be saved.</td>
<td>Click ‘Save Changes’</td>
</tr>
<tr>
<td>3.</td>
<td><strong>Note:</strong> Contact information includes the physical address, the primary phone number, the alternative phone number, the primary email address, and the alternative email address.</td>
<td>‘NA’</td>
</tr>
</tbody>
</table>

1.3.1 Key Points

- For updating contact information, you just type the updated information directly into the appropriate space.
  - Then click ‘Save Changes’ or the information will not be saved.
1.4 Updating Demographic Information

(Figure 5 – WebGrants 4 Students)

(Figure 6 – WebGrants 4 Students)
1.4.1 Key Points

- Click on the ‘demographics’ tab within the ‘Edit Profile’ menu.
- Click on one of the yellow icons.
- Call CSAC.
- Follow the instructions of the representative.
1.5 Accessing ‘3rd Party Access’ menu

(Figure 7 – WebGrants 4 Students)

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>After the student clicks the ‘Edit Profile’ button the ‘Edit Profile’ menu will pop up with the ‘Contact info’ tab selected as default. In order for the student to access the ‘3rd Party Access’ tab all they have to do is click on it.</td>
<td>Click on ‘3rd Party Access’ tab</td>
</tr>
<tr>
<td>2.</td>
<td>After the student clicks the ‘3rd Party Access’ tab they will have a screen (Figure 7) displaying a button to add a 3rd party and a paragraph explaining FERPA. The student should first read the FERPA statement.</td>
<td>Read FERPA statement</td>
</tr>
<tr>
<td>3.</td>
<td>After reading the FERPA statement, if the student wants to add a third party to their account, they must start by clicking the ‘+ Add 3rd Party’ button.</td>
<td>Click the ‘+ Add 3rd Party’ button</td>
</tr>
</tbody>
</table>

1.5.1 Key Points
- Click on the ‘3rd Party Access’ tab
- Read FERPA statement and determine if adding a 3rd party is what you want to do.
- If you want to add a 3rd party, click the ‘+ Add 3rd Party’ button.
1.6 **Adding a 3rd Party Representative**

(Figure 8 – WebGrants 4 Students)

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>After clicking the ‘+ Add 3rd Party’ button, a drop down will appear where the student must enter the name of, address of, and relation to the 3rd party person they would like to add.</td>
<td>Fill in fields with 3rd party identifiers</td>
</tr>
<tr>
<td>2.</td>
<td>The student should then read the disclaimer, check the box next to it, and click ‘Save Changes’.</td>
<td>Read disclaimer, click check box next to disclaimer, and click ‘save changes’</td>
</tr>
<tr>
<td>3.</td>
<td><strong>Note:</strong> A 3rd Party user can be removed anytime by going back to the ‘3rd Party Access’ tab and clicking the ‘Remove this person’ button.</td>
<td>To remove a person, click the ‘Remove this person’ button.</td>
</tr>
</tbody>
</table>

1.6.1 **Key Points**

- Fill in the fields with the 3rd party identifiers.
- Read and check the disclaimer, and save your changes
- To remove a person, click the ‘Remove this person’ button.
1.7 Verifying Updates went Successful

(Figure 9 – WebGrants 4 Students)

<table>
<thead>
<tr>
<th>Step</th>
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<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The student should verify that the information was saved and the easiest way to do this is to go back to the ‘Welcome’ box (Figure 9) on the student’s landing page and verify that all the information has updated correctly.</td>
<td>Verify information updated correctly in ‘Welcome’ box</td>
</tr>
</tbody>
</table>

1.7.1 Key Points

- Verify information updated correctly in the ‘Welcome box’ located on the Student Landing page.