User Guide: Viewing FERPA status in Salesforce

Last Updated: 2/23/2023

Overview: This user guide will walk through the process of viewing FERPA release information for a student within Salesforce and in The Lumberjack Family Hub (CampusESP). As of March 2023, The Lumberjack Family Hub (CampusESP) parent portal will be the system of record for FERPA release management. (https://families.nau.edu/)

More information about FERPA can be found on the NAU Registrar website: https://in.nau.edu/ferpa/

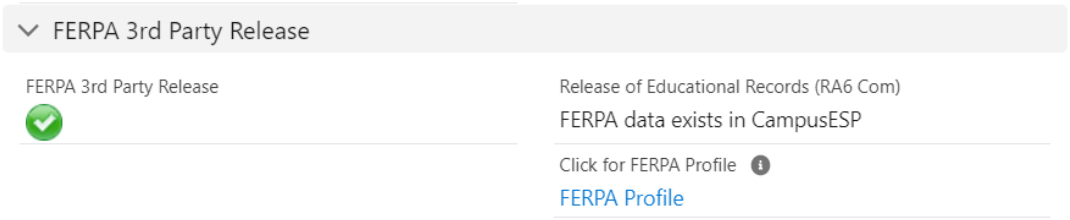
---

1. Log into Salesforce

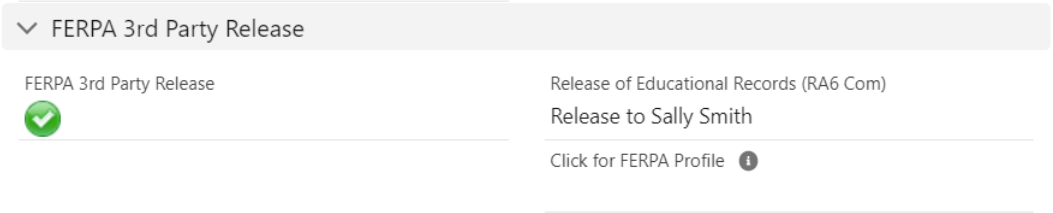
2. Navigate to the contact record of the student by using the search bar at the top of the screen. You can search by name or emplID.

3. Within the contact record in Salesforce, scroll until you can view the section titled 'FERPA and Release of Information Authorized'. Here you will see one of the three possible indicators:

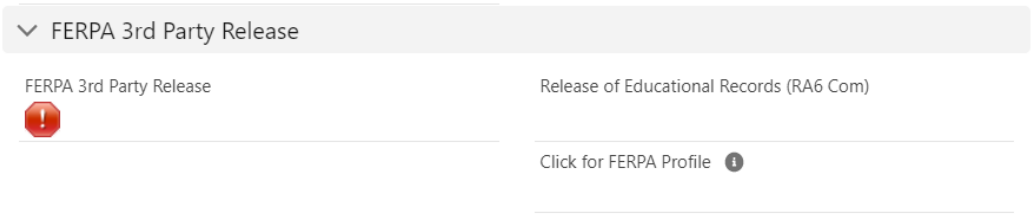
    a. Release of educational records (CampusESP) with **Green** Checkmark – This indicates that the student has granted FERPA access within the Lumberjack Family Hub. A link will be displayed (FERPA Profile) that will take you directly to the CampusESP portal to check release details (see step 4)



    b. Release of educational records (RA6 Com) with **Green** Checkmark – This indicates that the student has a FERPA release on file via the old process. The name of the person authorized to receive information will be listed.

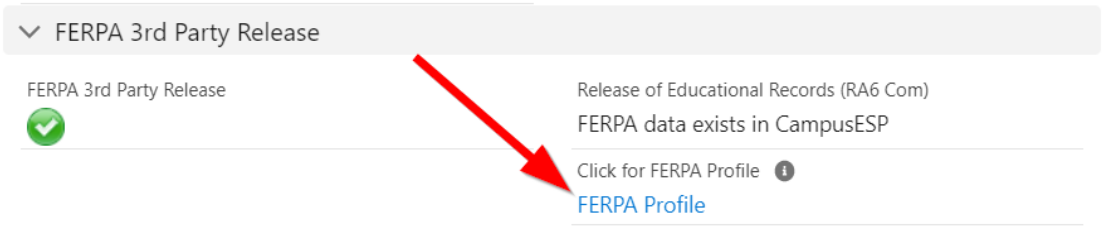


c. Release of educational records with **Red** exclamation point – This indicates that the student does not have a FERPA authorization on file and information should not be released.

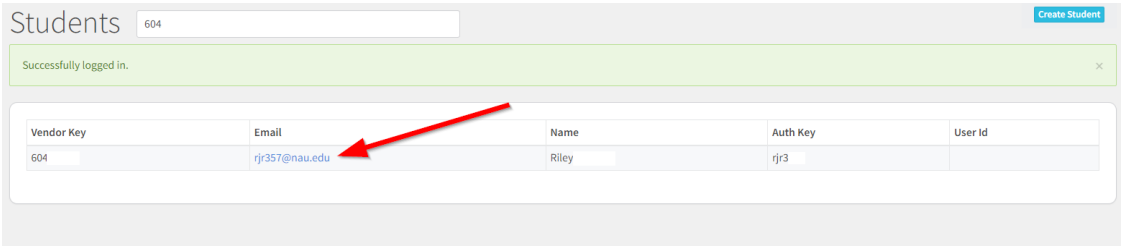


4. If the CampusESP indicator exists, then click the hyperlink: FERPA Profile. This will take you directly to the Lumberjack Family Hub portal student search screen.

   Note: If not already logged into the portal you will land on the sign-in page. Select login for faculty/staff near the bottom of the page. This will log you in via CAS authentication.



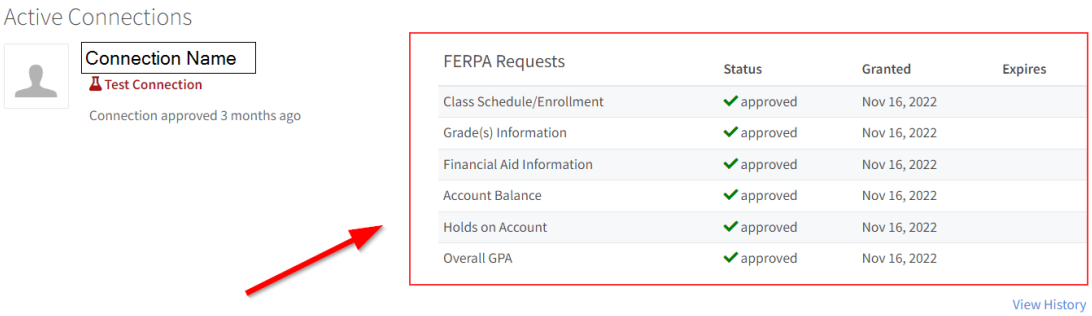
5. Once in the Lumberjack Family Hub portal, you will see the search results page. The link out should automatically search for the student and you will just need to click the email address to view the FERPA details.



6. Within the details page you must enter a PIN code to see FERPA grant information for a specific individual. This PIN will need to be provided by the family member over the phone. The PIN code is set-up at the time the family member requests a connection to a student. Additionally, the email address of the family member can be entered.

7. If the PIN code or email address entered is correct, then you will see the current FERPA grant information for that student, along with the name of the family member who has been granted FERPA information by the student.

   This page will show what information is available to be released to that specific family member.



8. END