Annually Review Your Users' Portal Access

The Great Lakes website (https://home.mygreatlakes.org) allows users at your institution to securely access the tools and resources they need to support student loan borrowers. As part of our commitment to security, we require users' portal access be reviewed annually to ensure all users who have access should retain it. Otherwise, their portal access expires.

If you're a security administrator at your institution, Great Lakes Client Services sends you an email 45 days before your users' portal access is set to expire to remind you of the review. If not completed, we send a follow-up email 30 days before the expiration date. Security administrators for several institutions may receive several emails each time period. If you're a user who doesn't have a security administrator assigned to them, you receive these emails prompting you to review your own portal access.

Note: The pages you see may look slightly different based on your user type.

You can use Great Lakes' Access Review Tool to easily review users' portal access and then either renew or expire it.

1. Open the Access Review Tool directly from a portal access review email you received from Client Services.

    a. Click the appropriate link in the email to perform the review.

    b. Log into your portal on the Great Lakes website when prompted.

   -or-

   Open the Access Review Tool via your portal.

    a. Access and log into your portal on the Great Lakes website.

    b. Click User Account Administration under Tools in the vertical menu.
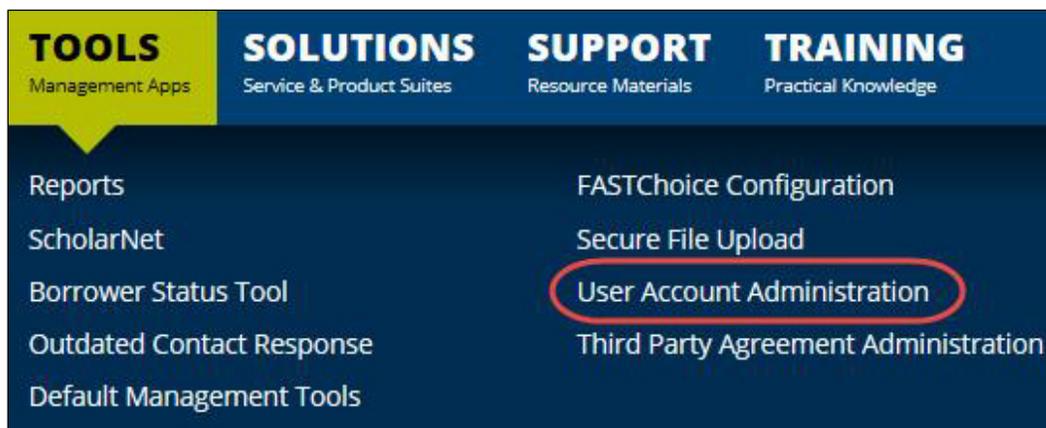
Figure 1. Example of the vertical menu indicating the User Account Administration link

2. Locate the user whose portal access you want to review.

    Tip: To easily find a user, enter all or part of a search term (e.g., the user's name) in the *Search* field, or click the column headers to sort the columns (e.g., sort the Status column to review access by status).

Status	When Does it Display, and What Actions Can I Take?
Active	Displays for users who currently have access to the appropriate portal, but whose portal access doesn't need to be reviewed at this time. You can review user details, enter notes for these users, and expire these users' portal access.
Expired	Displays for users whose portal access has expired. You can review user details and enter notes for these users, as necessary. If these users' portal access should not expire, contact Client Services at clientservices@glhec.org or (888) 686-6919.
Needs Review	Displays for users whose portal access needs to be reviewed (i.e., users whose portal access is set to expire in 45 days or less). You can review user details, enter notes for these users, and renew or expire these users' portal access, as necessary.

Figure 2. Example of the Access Review Tool indicating the Status column

3. View details about the user.

   a. Click the View Details column to expand the section, and then review the details in the Details section.

   b. If you have access rights, click <u>Review Access Roles</u> to review access roles currently assigned to a user. Refer to our *View and Update Website User Information* resource on Support Central for more information.

   c. In the *Notes* field, review any current notes for the user, or enter new notes, if appropriate.

   Tip: If there are current notes, an icon displays in the Notes column.

   Note: These notes are also visible to Client Services.

Figure 3. Example of the expanded section containing user details and the Notes *field*

4. Select *Renew Access* or *Expire Access* from the *Select Access* drop-down list in the Action column.

Figure 4. Example of selecting an option from the Select Access *drop-down list*

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5. Update the expiration date in the *Expiration Date* field, if needed.

Figure 5. Example of the Access Review Tool indicating the Expiration Date *field*

6. Click **Save Changes**.
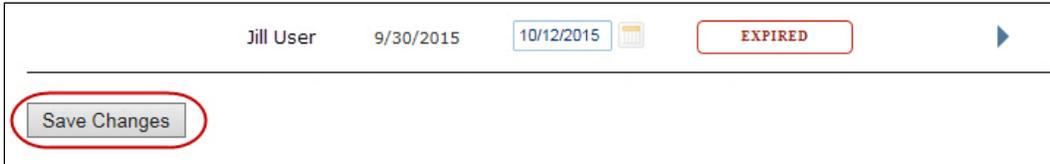
Figure 6. Example of the Access Review Tool indicating the **Save Changes** *button*

You receive a confirmation email indicating your changes.

Note: If you're a security administrator for your institution and you expire your own portal access, a pop-up opens indicating you must select a new security administrator for your assigned users. Select the appropriate security administrator from the drop-down list that displays, and then click **OK**. If you don't want to choose any of the security administrators listed, contact Client Services at clientservices@glhec.org or (888) 686-6919.