Annually Review Third-Party Agreements

Third-party agreements (agreements) grant third parties access to your school’s Great Lakes website account so they can work on behalf of your school (e.g., perform default management services). As part of our commitment to security, we require agreements be reviewed annually to determine whether third parties should retain access. Otherwise, the agreement (and access granted to third parties) expires.

If you’re a school signee on an agreement, Great Lakes Client Services sends you an email 45 days before the agreement expiration date to remind you of the review. If not completed, we send a follow-up email 30 days before the expiration date. School signees for multiple agreements may receive several emails each time period.

You can use our Access Review Tool to easily review agreements and then renew or expire them.

1. Open the Access Review Tool directly from an agreement review email you received from Client Services.
   a. Click the link provided in the email to perform the review.
   -or-
   b. Click Third Party Agreement Administration under Tools in the vertical menu.

2. Locate the agreement you want to review.
   Tip: To easily find an agreement, enter all or part of a search term (e.g., the third party’s name) in the Search field, or click the column headers to sort the columns (e.g., sort the Status column to review agreements by status).

<table>
<thead>
<tr>
<th>Status</th>
<th>When Does it Display, and What Actions Can I Take?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Needs</td>
<td>Displays for agreements requiring review (i.e., agreements set to expire in 45 days or less). You can review third-party signee details or enter notes and renew or expire these agreements.</td>
</tr>
<tr>
<td>Expired</td>
<td>Displays for expired agreements. You can review third-party signee details and enter notes for these agreements, as necessary. If agreements should not expire, contact Client Services at <a href="mailto:clientservices@glhec.org">clientservices@glhec.org</a> or (888) 686-6919.</td>
</tr>
</tbody>
</table>
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**Status**

<table>
<thead>
<tr>
<th>When Does it Display, and What Actions Can I Take?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active</strong> Displays for active agreements that don’t need to be reviewed at this time. You can review third-party signee details, enter notes for these agreements, and expire these agreements.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Action</th>
<th>Third Party</th>
<th>Effective Date</th>
<th>Expiration Date</th>
<th>Status</th>
<th>Notes</th>
<th>View Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Access</td>
<td>THIRD PARTY A</td>
<td>10/14/2015</td>
<td>10/14/2016</td>
<td>ACTIVE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select Access</td>
<td>THIRD PARTY B</td>
<td>10/14/2015</td>
<td>10/30/2015</td>
<td>NEEDS REVIEW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>THIRD PARTY C</td>
<td>10/9/2015</td>
<td>10/14/2015</td>
<td>EXPired</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

3. View details about the third-party signee.
   a. Click the View Details column to expand the section, and then review the details in the Details section.
   b. In the Notes field, review any current notes for the third-party signee, or enter new notes, if appropriate.
   
   **Tip:** If there are any 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 third-party signee 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*

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**.

![Save Changes button](image)

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

You receive a confirmation email indicating your changes.