

Instructions	<p>Complete all applicable sections.</p> <ul style="list-style-type: none"> • Banner Overview and Navigation Training is strongly recommended for all Banner users. • Third Party Access Agreement can be found at go.pacific.edu/ea • Sign and date the form (user, supervisor and campus rep if applicable). • Deliver signed request form to the applicable Data Steward/Information Broker to request approval of access. <p>Access will <u>not</u> be activated until approvals are obtained. An email confirmation will be sent when access is granted.</p>																
To be completed by requesting user	<p>Personal Data: Please Print</p> <p>Last Name: _____ First Name: _____ MI _____</p> <p>ID# 988 _____ TITLE: _____ EXT: _____ CAMPUS: <input type="checkbox"/> STK <input type="checkbox"/> SFO <input type="checkbox"/> SAC</p> <p>EMAIL: _____@pacific.edu DEPT/SCHOOL _____</p> <p><input type="checkbox"/> Faculty Self-Service (<i>Faculty only</i>)</p> <p><input type="checkbox"/> I have read the Confidentiality Acknowledgement Statement and agree to abide by the policies outlined therein.</p> <p><input type="checkbox"/> I have completed the FERPA online training.</p> <p style="text-align: right;">_____ Employee Signature</p> <p style="text-align: right;">_____ Date</p>																
To be completed by user's supervisor	<p><input type="checkbox"/> NEW – No Current Access <input type="checkbox"/> REMOVE – Expire account, user no longer holds this position. Stop here, sign, scan and email to Ana Orellana or fax this form to OIT/Configuration Management Specialist at 209-946-3269</p> <p><input type="checkbox"/> ADD – Additional Access Requested for current End-User.</p> <p><input type="checkbox"/> Regular Faculty <input type="checkbox"/> Temporary Casual, Expiration Date: _____</p> <p><input type="checkbox"/> Regular Staff <input type="checkbox"/> Student, Expiration Date _____</p> <p><input type="checkbox"/> Third Party, Expiration Date: _____</p> <p>Module (Select as Applicable) <input type="checkbox"/> Accounts Receivable <input type="checkbox"/> Admissions <input type="checkbox"/> Advancement <input type="checkbox"/> Faculty <input type="checkbox"/> Finance <input type="checkbox"/> Financial Aid</p> <p style="margin-left: 100px;"><input type="checkbox"/> Housing <input type="checkbox"/> Human Resources <input type="checkbox"/> ODS <input type="checkbox"/> QAS <input type="checkbox"/> Registrar <input type="checkbox"/> SDA <input type="checkbox"/> Student</p> <p>User needs access to perform the following job functions:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Authorization: I approve the access requested by the above employee. If the employee leaves the University or transfers to a different department, I will notify OIT so the departmental access is terminated.</p> <table style="width:100%; border: none;"> <tr> <td style="width: 33%; border: none;">_____</td> <td style="width: 33%; border: none;">_____</td> <td style="width: 15%; border: none;">_____</td> <td style="width: 19%; border: none;">_____</td> </tr> <tr> <td style="border: none;">Print Name Supervisor/Department Head/Dean/Director</td> <td style="border: none;">Approval Signature Supervisor/Department Head/Dean/Director</td> <td style="border: none;">Date</td> <td style="border: none;">Phone Ext.</td> </tr> <tr> <td style="border: none;">_____</td> <td style="border: none;">_____</td> <td style="border: none;">_____</td> <td style="border: none;">_____</td> </tr> <tr> <td style="border: none;">Print Name Campus Representative (SAC, SFO)</td> <td style="border: none;">Approval Signature Campus Representative (SAC, SFO)</td> <td style="border: none;">Date</td> <td style="border: none;">Phone Ext.</td> </tr> </table>	_____	_____	_____	_____	Print Name Supervisor/Department Head/Dean/Director	Approval Signature Supervisor/Department Head/Dean/Director	Date	Phone Ext.	_____	_____	_____	_____	Print Name Campus Representative (SAC, SFO)	Approval Signature Campus Representative (SAC, SFO)	Date	Phone Ext.
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_____	_____	_____	_____														
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Data Steward/OIT	<p>Access Type (select one) Banner: <input type="checkbox"/> QUERY (view only) <input type="checkbox"/> DATA ENTRY (update) Discoverer: <input type="checkbox"/> VIEWER <input type="checkbox"/> PLUS</p> <p>Security Class: _____ OR Banner Objects (forms and/or procedures): _____</p> <p>Business View or Area: _____ Primary Reporting View: _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Signatures</p> <table style="width:100%; border: none;"> <tr> <td style="width: 50%; border: none;">Data Steward _____</td> <td style="width: 50%; border: none;">Data Steward _____</td> </tr> <tr> <td style="border: none;">Print Name _____ <input type="checkbox"/> DENIED Date _____</td> <td style="border: none;">Print Name _____ <input type="checkbox"/> DENIED Date _____</td> </tr> </table>	Data Steward _____	Data Steward _____	Print Name _____ <input type="checkbox"/> DENIED Date _____	Print Name _____ <input type="checkbox"/> DENIED Date _____												
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ERP Data Access Request Procedures

<p>Step 1</p> <p>Requesting User</p>	<ul style="list-style-type: none"> ❖ Complete the Personal Data Section. ❖ Sign the Confidentiality Acknowledgement Statement and complete the FERPA online training certificate (<i>To access the FERPA online test, please log on to insidePacific select the Administrative tab and select FERPA tutorial or test.</i>) Send signed copies to Human Resources. ❖ Faculty members must check box for Faculty Self Service ❖ Third-party access (consultants, contractors and agency temporaries) must complete the "Third Party Access Agreement" found at go.pacific.edu/ea . ❖ Sign the Banner Access Form and forward it to your immediate supervisor for signature.
<p>Step 2</p> <p>Requestor's Supervisor</p>	<ul style="list-style-type: none"> ❖ Complete middle section of the form. ❖ Select all modules needed by end-user. ❖ Describe the need for access based on the requesting user's job functions. ❖ Sign form. ❖ Forward form to campus representative (SAC or SFO only). ❖ Forward form to the Banner Data Steward (DS)/Information Broker (IB) that is first on the list of Modules selected.
<p>Step 3</p> <p>Data Steward (DS) and or Information Broker (IB)</p>	<ul style="list-style-type: none"> ❖ Once all requirements are met, the DS/IB grants or denies approval for his/her assigned module. If denying request make sure DENIED box is checked off. ❖ DS/IB details access based on security class or direct object access with query or update for Banner or viewer or plus for Discoverer identified. ❖ Sign form and forward it to the next DS/IB of the modules selected. DS/IB turn around time is typically two business days. ❖ Once approval for all modules is obtained, the last approving DS/IB forwards form to the EA Group Configuration Management Specialist. Scanned email documents preferred. EA Group Banner DBA turn around time is typically one full business day. Email scanned forms to Ana Orellana.
<p>Step 4</p> <p>Banner DBA</p>	<ul style="list-style-type: none"> ❖ Banner DBA notifies the DS/IB(s) when the end-user has been created.
<p>Step 5</p> <p>DS/IB</p>	<ul style="list-style-type: none"> ❖ DS/IB completes the process and notifies the end-user and/or the supervisor.
<p>Please note that issuing "generic" Banner accounts is no longer possible. We will work with you to ensure that you can accomplish your business processing while adhering to University data and security policies.</p> <p>Banner Overview and Navigation Training is strongly Recommended for all Banner users. Contact: Kim Cose, IT Trainer Coordinator.</p>	
Banner Module	Data Steward / Info Broker/Campus Representative
Accounts Receivable	<p>Suzette Calderone, Information Broker Bob Murta – SAC Campus Representative Audrey Goodell – SFO Campus Representative</p> <p>Contains financial information related to student account activity.</p>
Admissions & International Students	<p>Robyn Grace Jennings, Information Broker AnneMarie Meyer – SAC Campus Representative</p> <p>Contains information on inquiries and all applicants for admission.</p>
Advancement	<p>Caroline Darsie, Information Broker – In all three campuses</p> <p>Contains Information on Alumni and donors. Access is strictly limited to staff who report through Advancement Department.</p>

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Faculty	<p>Mike Rogers, Information Broker – In all three campuses</p> <p>Contains information pertaining to an individual faculty member's academic appointment.</p>
Finance	<p>Audrey George, Data Steward Bob Murta – SAC Campus Representative Audrey Goodell – SFO Campus Representative</p> <p>Contains financial information related to the procure-to-pay process and budget management.</p>
Financial Aid	<p>Lynn Fox, Data Steward Joe Pinkas – SAC Campus Representative</p> <p>Contains financial information applicable to student aid toward tuition fees.</p>
Housing & Location Management	<p>Silvina Sousa-Ransford, Information Broker Nancy Whalen – SAC Campus Representative</p> <p>Contains on-campus student housing information, including student placements and meal plan history.</p>
Human Resources & Position Control	<p>Jane Lewis, Data Steward Patrice Coss, Information Broker Elisa Levy – SAC Campus Representative Kara Bell – SFO Campus Representative</p> <p>Contains demographic and employment information. As well as all related payroll information and position control with related budgeting and labor distribution.</p>
Registrar	<p>Dede Sanchez, Information Broker Carol Hunter – SAC Campus Representative Daniel Bender – SFO Campus Representative</p> <p>Contains registrar related information applicable to Registrar staff only.</p>
Student	<p>Cecilia Rodriguez, Data Steward Carol Hunter – SAC Campus Representative Daniel Bender – SFO Campus Representative</p> <p>Contains all student records such as, grades, advising, schedules, registration, course catalogs.</p>

CONFIDENTIALITY ACKNOWLEDGEMENT

V1.0 Finalized April 24, 2008

University of the Pacific policy treats certain information and communications as Confidential or Restricted Access information (*Computing and Communications Confidentiality Policy*, Information Technology Policies <http://www.pacific.edu/oit/policies>)

It is also University policy that users of University computing and communications resources are responsible for taking appropriate steps to safeguard Confidential and Restricted Access information (*Acceptable Use Policy*, Information Technology Policies <http://www.pacific.edu/oit/policies>).

Pacific, through its employees, must protect the confidentiality of all aspects of Confidential and Restricted Access information in accordance the Family Educational Rights & Privacy Act (FERPA) as amended (20 U.S.C. 1232(G)), Gramm-Leach-Bliley Act (GLBA), the Health Insurance Portability and Accountability Act (HIPAA) and other laws.

By signing this form, I understand my responsibilities to adhere to University policies and I agree that I will not, outside of the performance of my authorized duties, access, print, copy, or disclose Confidential or Restricted Access information to anyone. I understand that any breach of my responsibilities may result in disciplinary action in accordance with University policies.

Signature

Date

Print or Type Name

988

Identification Number

Department/Unit

Phone

Please return completed form to Human Resources.