

UCSC - Financial Information System Access Form

(To be completed by employee's business office)

Important: Form must be filled out in [Adobe Reader](#) or Acrobat Professional 8.1 or above. To save completed forms, Acrobat Professional is required. For technical and accessibility assistance, contact finaff-tech@ucsc.edu. Form questions: Email fis_probs@ucsc.edu

Section 1: General Information

Name:

Last Name,

First Name

Email:

Phone:

Division:

Campus Unit:

Please select UCSC status:

Staff

Student

Faculty

Temp/Other

Employee ID:

Effective Access Dates:

From:

Temporary

To:

Ongoing

If employee has current FIS Banner access at another division, please note division here : _____

Please select one:

New Account

Change To

Existing Account

Section 2: Query Access

Indicate the type(s) of inquiry the employee is authorized to perform:

- Acquisitions inquiry (Purchase Orders and Invoices, includes FOIDOCH, FAIVNDH)
- Financial/Budgetary inquiry (includes FGIBDST, FGIDOCR, FGITRND, FZIABAL, FZIJVCD)
(List authorized organization codes below)
- Encumbrance inquiry (General and PO encumbrances, includes FGIENCD, FGIOENC)
(List authorized organization codes below)
- _____

Indicate the organization codes which may be accessed by this employee for financial and encumbrance inquiry. Use predecessor organization codes when possible.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Section 3: Journal Vouchers

Input: Select all that apply

XTOE - Transfer of Expense (TOE)

XTOF - Transfer of Funds - budgetary (TOF)

XEPT / XEQT - Plant and Inventorial Equipment transfers

XJVB / XPRA - Balance Sheet / Allowable Payroll Adjustment transfers

XECG - Contracts & Grants / Special State Appropriations expense transfers

XDCCG - Contracts & Grants / Special State Appropriations budgetary transfers

X032 - Purchase Order encumbrance liquidation

XTAX / XPTX - Sales Tax accrual/Procard Sales Tax accrual

Section 3: Journal Vouchers (continued)

Use predecessor organization codes

Approvals: <i>Select which types of journals employee is authorized to approve</i>	\$ Limit	Org Codes
<input type="checkbox"/> XTOE - Transfer of Expense (TOE)		
<input type="checkbox"/> XTOF - Transfer of Funds - budgetary (TOF)		
<input type="checkbox"/> XEPT / XEQT - Plant and Inventorial Equipment transfers		
<input type="checkbox"/> XJVB / XPRA - Balance Sheet / Allowable Payroll Adjustment transfers		
<input type="checkbox"/> XECG - contracts & grants / special state appropriations expense transfers		
<input type="checkbox"/> XDCG - Contracts & Grants / Special State Appropriations budgetary transfers		
<input type="checkbox"/> X032 - Purchase Order encumbrance liquidation		
<input type="checkbox"/>		

Section 4: Special Instructions

Section 5: Authorization *All signatures are required*

FIS Divisional Access Authorizer and Primary Contact List is available here: https://financial.ucsc.edu/Pages/Access_Authorizers_FIS.aspx

Signing indicates agreement to abide by UCSC Information Security policy as specified at: <http://its.ucsc.edu/security/restricted.html>

Employee Signature:	Print Name:	Date:
<input type="text"/>	<input type="text"/>	<input type="text"/>
Supervisor Signature:	Print Name:	Date:
<input type="text"/>	<input type="text"/>	<input type="text"/>
FIS Divisional Access Authorizer:	Print Name:	Date:
<input type="text"/>	<input type="text"/>	<input type="text"/>

Section 6: Next Steps / Submit Information

Please submit this form to Enterprise Financial Systems:

Scan and e-mail to fis_probs@ucsc.edu or mail to FIS Account Administration Mailstop: Accounting Office

IMPORTANT: Completion of the [Access to Information Statement](#) is required for all **new** FIS Banner accounts. (CruzID Gold login required.) For more information, please visit: <http://its.ucsc.edu/accounts/forms.html#fis>.

You will be notified by email when your account is ready with instructions on how to pick up your account login information.

For more information, please visit https://financial.ucsc.edu/Pages/FIS_User_Manual.aspx.