

# UCSC - Financial Information System Access Form

(To be completed by employee's business office)

Important: For full functionality, it may be necessary to download a copy of this form to your computer and open with [Adobe Reader](#) or [Acrobat Professional](#). To save a completed form, you may need [Acrobat Professional](#). For technical and accessibility assistance, contact [finaff-tech@ucsc.edu](mailto:finaff-tech@ucsc.edu). For questions on how to complete form, email: [fis\\_probs@ucsc.edu](mailto: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       Existing Account       Change To

## 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.

_____	_____	_____	_____	_____	_____
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## Section 3: Journal Vouchers

<b>Input:</b> Select all that apply
<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"/> XTAX / XPTX - Sales Tax accrual/Procard Sales Tax accrual
<input type="checkbox"/>

### 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

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### 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](https://financial.ucsc.edu/Pages/Access_Authorizers_FIS.aspx)

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

**If you are requesting a NEW FIS Account, submit this form to:**

ITS Support Center, 54 Kerr Hall

Fax: 459-4171

**IMPORTANT:** Additional forms are required for all new FIS Banner accounts. Please refer to this ITS URL for complete instructions.

**If you are requesting a MODIFICATION to an existing FIS account, submit this form:**

Scan and e-mail to [fis\\_probs@ucsc.edu](mailto:fis_probs@ucsc.edu),

or mail to: FIS Account Administration, Mailstop: Accounting Office