

Banner Account Management

I. Banner User Information			
Full Name:		Job Title:	
User ID:		Department:	
Location:			
Employee type:	<input type="checkbox"/> Regular Employee <input type="checkbox"/> Temporary employee <input type="checkbox"/> Student Aide <input type="checkbox"/> Faculty <input type="checkbox"/> Adjunct faculty		

II. Requesting Supervisor			
Full Name:		Phone:	
Job Title:		Department:	
Banner User Qualifications			
Has the Banner user completed the new employee orientation of Banner training?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Has the Banner user read and signed the Introduction to FERPA? ¹	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Has the Banner user read and signed the Acceptable Use Standard? ^{2,3}	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Has the Banner user read the Data Classification Standard? ⁴	Yes <input type="checkbox"/>	No <input type="checkbox"/>	

As the employee's direct supervisor, I understand the importance of protecting student and college information in Banner, and attest that all information above is correct:

Supervisor Name:

Date:

As the Business Office Representative, Vice President, or Human Resources representative, I attest that the Banner user and requesting supervisor information is correct:

Name:

Date:

¹ <http://www.pima.edu/admin/it/ITforms/Intro-to-FERPA.pdf>

² <http://www.pima.edu/admin/it/documents/Acceptable-Use.pdf>

³ A copy of the Introduction to FERPA and the Acceptable Use Standard should be sent to :HR Employment Processing at DO-1180

⁴ <http://www.pima.edu/admin/it/documents/Data-Classification.pdf>

Banner Access Rights

Please indicate **ALL** access necessary for current job functions.

Financial Aid (Terra Benson module leader --- Anna Reese backup module leader)		
<input type="checkbox"/> 1. Cashiers & Welcome Center ⁵	<input type="checkbox"/> 4. Executive & Assistant Directors	
<input type="checkbox"/> 2. Student Services Advanced Specialists	<input type="checkbox"/> Auditor full query	
<input type="checkbox"/> 3. Financial Aid staff		
Finance (Ina Lancaster module leader --- Charlie McConnell backup module leader)		
<input type="checkbox"/> Basic Access		
<input type="checkbox"/> Campus Business Office	<input type="checkbox"/> Grants	<input type="checkbox"/> Financial System Analyst
<input type="checkbox"/> Receiving	<input type="checkbox"/> Property Control	<input type="checkbox"/> Unit Business Monitor
Highly Restricted Access		
<input type="checkbox"/> A/P Supervisor	<input type="checkbox"/> A/P Checks-Intellectcheck	<input type="checkbox"/> A/P Checks-Banner
<input type="checkbox"/> A/P Specialist	<input type="checkbox"/> Approval Queue Maintenance	<input type="checkbox"/> Approval Queues
<input type="checkbox"/> Procurement	<input type="checkbox"/> Budget and Reporting	
Human Resources (Leslie Weng module leader --- Doreen Armstrong backup module leader)		
<input type="checkbox"/> 1. Query for PAR Completion	<input type="checkbox"/> Benefits Administration	
<input type="checkbox"/> 2. Employee/Job Creation	<input type="checkbox"/> HR Administration	
<input type="checkbox"/> 3. Applicant/Certification Update	<input type="checkbox"/> Payroll Operations (query)	
<input type="checkbox"/> Budget/Position Control	<input type="checkbox"/> Payroll Operations (update)	
<input type="checkbox"/> EEO/IPEDS		
Accounts Receivable (Henry Rillos module leader --- Allison Pyle backup module leader)		
<input type="checkbox"/> 1. Basic Access ⁶		
<input type="checkbox"/> 2. Technician	<input type="checkbox"/> 6. Cashiers	
<input type="checkbox"/> 3. Specialists	<input type="checkbox"/> 7. Lead Cashier	
<input type="checkbox"/> 4. Billing (DO only)	<input type="checkbox"/> 8. Supervisor/Analyst/Director (DO only)	
<input type="checkbox"/> 5. Collections (DO only)		
Student (Michael Tulino module leader – Craig Winters backup module leader)		
<input type="checkbox"/> Basic Access ⁷		
<input type="checkbox"/> Admit Students	<input type="checkbox"/> Enter/Change Grades, Print Official Transcripts	<input type="checkbox"/> Enter Assessment Test Scores
<input type="checkbox"/> Register Students	<input type="checkbox"/> Award/ Deny Degrees	<input type="checkbox"/> View Grades, GPA, Class Rosters
<input type="checkbox"/> Place/ Expire Holds	<input type="checkbox"/> Build CRNs, Assign Faculty/Contracts	<input type="checkbox"/> Print Unofficial Transcripts
Highly Restricted Access		
<input type="checkbox"/> Create Location Records	<input type="checkbox"/> Evaluate Incoming Transcripts	<input type="checkbox"/> Build Course Catalog
<input type="checkbox"/> DO Financial Aid Office Management	<input type="checkbox"/> DO Student Accounts Office Management	<input type="checkbox"/> DO Registrar Office Management
Special Access (Examples include requesting access to Pima reports. Access requests in this section <i>cannot</i> include any forms from the Student, HR, AR, Finance, or Financial Aid modules.)		
<input checked="" type="checkbox"/> Banner General Forms (required for all accounts).		

⁵ Numbered classes indicate cumulative access: when selecting a number check all access below that number as well.

⁶ All module leaders are authorized to approve Basic Access for Accounts Receivable.

⁷ Any users with Accounts Receivable or Financial Aid accounts will receive Basic Access to student. The module leaders for AR or Financial Aid are authorized to approve this access.

Banner Form Procedures

The Supervisor of the employee who needs Banner access (“the supervisor”) is responsible for initiating and monitoring the overall process. This process will take between 3 to 5 business days to complete.

1. The supervisor will begin the process:
 - a. The supervisor will ensure their employee (“banner user”) has met all “Banner User Qualifications”.
 - b. The supervisor will ensure the form specifies all access the employee needs to fulfill their job function.
 - c. The supervisor will complete the “Banner Account Management” form and e-mail it accordingly:
 - i. Most supervisors on campus will e-mail the campus business office.
 - ii. Student services supervisors will e-mail the form to the Vice President of Student Services.
 - iii. District Office supervisors will e-mail the form to the HR module leader.

2. Campus Business Office/VP Student Services/District HR will verify form : (within 1 day of form receipt)
 - a. Verify all user and supervisor information on page 1, sections I & II.
 - b. If the form is incomplete or inaccurate, the supervisor will be immediately notified via e-mail.
 - c. After verification, the original e-mail⁸ from the supervisor will be forwarded to every appropriate module leader, as indicated on page 2 of the form. This e-mail will include an updated copy of the form with the business office, VP or HR representative’s name and date of verification.
 - d. Send e-mail to both the primary & backup module leader to ensure response.

3. Banner Module leaders will determine authorization: (within 2 days of form receipt)
 - a. Appropriate authorization will be determined so long as process #2 above has been completed.
 - b. Denied access requests will be noted in an e-mail to the supervisor.
 - c. If approved, the original e-mail from steps 1 & 2 will be forwarded to banner_account_request@pima.edu (the supervisor will be cc’ed), along with an updated copy of the “Banner Account Management” form, with only approved access indicated on page 2, and the approving module leader’s name and date indicated on page 1.

4. IT will implement changes: (within 2 days of form receipt)
 - a. IT check form to ensure it is complete. Incomplete forms will be returned to module leaders.
 - b. IT will digitally store all “Banner Account Management” forms and e-mailed approvals.
 - c. IT will ensure an account *only* has the access indicated on the form. Pre-existing access will be removed if it has not been explicitly specified on the most recent form.
 - d. After changes have been implemented, IT will notify the supervisor, the banner user, and module leader(s).

⁸ Using the original e-mail is essential to ensure that a history of all appropriate approvals are documented.

