

# Instructions for Supervisors filling out the Request for Access to Banner For an Employee or School Official

**If the person who needs access to Banner is a NEW Faculty Member:**

Once it has been determined that the person will be hired, the President's Office will forward the Request for Access to Banner form to the employee with the new employee's contract. The new employee should sign Section 3 (FERPA Compliance) and then initial Section 4 and return it to the President's Office with the signed contract. The President's Office should then forward the Request for Access to Banner form to the hiring department who will fill out the rest of the form by following the instructions found at the top of Section 1.

**If the person who needs access to Banner is a NEW Staff Member who will need access the first day on the job:**

Once it has been determined that the person will be hired, the hiring department may mail the Request for Access to Banner form to the new employee to sign Section 3 (FERPA Compliance) and then initial Section 4. Once the hiring department receives the form back from the new employee, they can fill out the rest of the form by following the instructions found at the top of Section 1.

**All other persons requesting access to Banner should follow the instructions found at the top of Section 1 of the form.**

A **School Official** is a person employed by the University in an administrative, supervisory, academic or research, or support staff position (including law enforcement unit personnel and health staff); a person or company with whom the University has contracted as its agent to provide a service instead of using University employees or officials (such as an attorney, auditor, or collection agent); a person serving on the Board of Trustees; or a student serving on an official committee, such as a disciplinary or grievance committee, or assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibilities for the University.

NOTE: If you are having trouble determining what type of access your new employee needs, please contact your Head Data Custodian. See Section 4C on the Request for Access to Banner Form to determine who your Head Data Custodian is.



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**Section 3 -COMPLIANCE (continued)**

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All other information is private and may be released outside the University only with the student's written permission. No information, public or private, on an applicant's record may be released outside the University, except to an agent designated by the applicant, until the applicant becomes a registered student and has a chance to initiate a suppress. No information on financial aid records may be released outside the University except as authorized or required by federal and state regulations. **Also, within the University, publishing of non-directory information, especially social security numbers and campus ID's, should be kept to an absolute minimum. (Publishing includes, but is not limited to, copies of the information for office or workgroup use, formal reports, and factbooks.) Such publishing should be limited to within office or workgroup use. Identification numbers should never be published in documents intended for general consumption. Hard-copy documents should be kept in secured locations, and electronic files should not be kept on laptop hard-drives.**

Staff granted access to Banner student institutional databases or batch files agree to:

- Comply with all data standards policies as presented in the Guidelines for Data Standards, Data Integrity and Security;
- Store information under secure conditions;
- Make every effort to ensure students' privacy;
- Destroy information when it is no longer needed;
- Use information only as described in the request for data or access to institutional data base files;
- Release information to a third party only if authorized approval is given;
- Never represent summary data from files as "official" University data.

**Violations.** Violation of federal law, System policy, or University policy constitutes grounds for rescinding access to Banner records or imposing disciplinary action, up to and including dismissal. Violations include the following offenses and any other comparable action:

- Not adhering to data standards guidelines as presented in the Guidelines for Data Standards, Data Integrity and Security;
- Releasing public information about student requested on the basis of non-public information (e.g., names of all international students, name of all students with a GPA lower than 2.0);
- Altering a student's record without appropriate supporting documentation/authorization, regardless of whether you benefit from this alteration;
- Accessing a student record outside of your assigned duties;
- Releasing suppressed or private information without authorization;
- Publicly discussing a student's record in a way that might personally identify that student;
- Sharing computer security passwords.

\_\_\_\_\_ I have read this compliance statement and agree to the conditions and terms outlined herein.

Signature of Employee

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**Section 4 - AUTHORIZATION**

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- A. Access to Banner must be authorized by an employee's supervisor (Director/Department Head/Dean). By signing below, the supervisor certifies that the access requested is required to carry out the responsibilities of this employee's position and that the Information Technology Department will be notified if the employee's duties change during the course of his/her employment at Angelo State University.

\_\_\_\_\_

Printed Name

Phone Number

- B. **For Employees Entering General Person Information in Banner ( %PAIDEN, SPATELE, SPAPERS, GOAEMAL, SOAHOLD, SPACMNT, GOAMTCH) Only.**

As the employee's Supervisor, I understand it is my responsibility to explain and create a level of awareness in the employee concerning the Angelo State University Banner Data Standards. The Data Standards Document is available at <http://www.angelo.edu/services/banner/>

(Supervisor's initials)

As the employee, I understand I must score 80% or more on the Data Standards Quiz within two weeks of receiving access to Banner.

(Employee's initials)

- C. **This form must be forwarded to your Head Data Custodian for approval before IT will give you access to Banner.** Please use the chart below to determine who your Head Data Custodian is.

**If you primarily work with:**

Student Related Data  
Employment & Payroll Data  
Financial Data  
Alumni/Development Data  
Financial Aid Data

**Your Head Data Custodian is the:**

Registrar  
Director of Budget and Payroll Services  
Controller  
Director of Development  
Director of Financial Aid

**FAX:**

325-942-2553  
325-942-2228  
325-942-2522  
325-942-2218  
325-942-2082

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**For Head Data Custodian Use Only**    Date Copied and Sent to IT \_\_\_\_\_    Approved for Cross Access \_\_\_\_\_    Initials \_\_\_\_\_

**For IT Use Only**    Date Completed \_\_\_\_\_    Initials \_\_\_\_\_    Last Revised 05/20/15

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### Banner Access

- Admissions / Recruiting/
- Advancement / Alumni
- Advising
- Budget
- Center for Academic Excellence
- Deans Secretary
- Departmental Secretary
- Financial Aid
- Holds Query Access
- Holds Update Access
- Honors
- Library Query Access
- Library Update Access
- Nursing
- Requisitions: List Organizations \_\_\_\_
- Schedule Build
- Transfer Credit
- Up and Coming Scholars
- Other: \_\_\_\_\_

### Additional Access

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- Cognos