Request for Access to Student Information

Use this form to request access to one or more of the following systems:

- PeopleSoft, the student information system
- Class lists (for non-instructors of record, to access class lists for the entire department/school/college/campus)
- Advisee lists (to access advisee lists for the entire department/school/college/campus)
- Textbook (for non-instructors of record, to access class lists for the entire department/school/college/campus)

Faculty / Instructors and Advisors: If you only use advisee lists, class lists, and/or online grading to access **your** students/advisees data, then you **do not** need to complete this form.

This form should be completed after discussion with your supervisor about appropriate level of access. Once this form is complete and signed, return it to the OIT Service Desk at Grosvenor 138 or servicedesk@ohio.edu. You must also return a signed FERPA Compliance Statement in order for this form to be processed.

Section I – Employee Information

Name: _____ OHIO ID (username): _____

Department/School: _____ Campus: _____

Position Title (include all titles, i.e. department chair and advisor): _____

Phone: _____ PID: _____

Is this employee replacing someone? Yes ☐ No ☐ If yes, please provide Ohio ID of former employee: _____

Should this employee have the same access as someone else in the department? Yes ☐ No ☐ If yes, who: _____

Section II – Inventory of Job Functions/Responsibilities

Student Records/Registrar

PeopleSoft Access

Please consider, do you … (If you provide coverage for other employees, please include those functions)

☐ View general student records (For office use: SR1).

☐ Add or remove student record holds. If so, what hold code/reason (SR2): _____

☐ View grades. Please note, this is for viewing grades in PeopleSoft. For viewing grades in Faculty & Advising Center, select Advisee Lists in order to view a student's DARS (SR3).

☐ Register students. If so, which departments/schools/colleges/campuses (SR4): _____

☐ Schedule classes, assign rooms, update class section information. Please list (SR5): _____

☐ Change or update students' academic advisor (SR6).

☐ Update students' programs (add, delete, or update students' majors, minors, and/or certificates) (SR7).

☐ Review undergraduate students on academic probation and update their academic probation statuses (SR8).

☐ Work in a college student services office and process DARS exceptions (SR9).

☐ Enter/update the following student groups (SR10): _____

Faculty and Advising Center Access

☐ Access Class lists for departments/schools/colleges/campuses. If yes, which ones (SR11): _____

☐ Access Advisee lists for departments/schools/colleges/campuses. Includes DARS access. If yes, which ones (SR12): _____

☐ Issue and approve online class permissions. If yes, which college/department/subjects (SR13): _____

Textbook

☐ Enter/update textbook information for the following departments/schools/colleges/campuses (SR14): _____

Financial Aid

- ☐ I use information regarding a student's financial aid eligibility or specific award eligibility (For office use: FA1).
- ☐ I perform selections for awards/scholarships (FA2).

Admissions and Transfer Credit

- ☐ I need to view applicant information and application detail in the student information system (For office use: AD/TC1).
- ☐ I work in one of the University's admitting centers and need to update applicant information and/or admission status (AD/TC2).
- ☐ I need to view a student's transfer credit (including coursework, credit by exam, and non-traditional credit) and the status of the evaluation of those credits (AD/TC3).
- ☐ I evaluate transfer credit and need to enter course equivalences for students (AD/TC4).

Student Financials/Bursar

- ☐ I assist with student account inquiries regarding charges, payments, anticipated financial aid, financial aid disbursements, refunds, and due dates (For office use: SF1).
- ☐ I post payments (via CASHNet) (SF2).
- ☐ I research PeopleSoft transactions that post to accounts in the General Ledger or Grant Accounting module of Oracle Financials (SF3).

Please include any additional information that may help determine appropriate access, such as job functions, populations you work with, etc. Please be specific. If you need more space, please attach a separate page.

Section III – Signatures and Approvals

Employee

I understand that by circumstance of my employment with Ohio University, I may have access to student educational records or to personally identifiable student information, the disclosure of which is governed by the Family Educational Rights and Privacy Act of 1974, as amended (FERPA), State of Ohio law, and by University policy. I am aware that I must manage the data, materials, and records to which I may have access in a professional and confidential manner.

I agree, therefore, that I will not disclose, or cause to be disclosed, student education records or personally identifiable information of which I have knowledge or to which I have access only in accordance with FERPA, State of Ohio law, and University policy.

I agree to maintain the confidentiality and privacy of student education records during and after my period(s) of employment at the University. I understand that any disclosure of such records may be grounds for termination, prohibition of future employment, and/or (if applicable) student disciplinary action under the student code of conduct.

I understand that information from my University Human Resources record may be used in order for my access to be granted.

Name (Print): _____ Date: _____

Signature: _____

Immediate Supervisor <u>or</u> Department Chair/Director/Dean

I, the undersigned, verify that the employee requesting access has a legitimate need to access the PeopleSoft student information system to fulfill responsibilities within their current position. I will inform the OIT Service Desk of any change in the job responsibilities of this employee.

Name (Print): _____ Date: _____

Signature: _____