



APPLICATION FOR FINANCE ACCESS (Banner and Lawson)

(To request INITIAL ACCESS to the Banner and/or Lawson finance systems)

Applicant Responsibilities (signature below indicates acceptance of these responsibilities)

1. Access is restricted to University employees performing official duties of their position.
2. Comply with the University's policy on Responsible Use of Information Technology (<http://www.utoledo.edu/policy/index.asp?id=68>).
3. Comply with the Family Education Rights and Privacy Act (FERPA) (<http://www.utoledo.edu/policy/index.asp?id=45>). Please contact the Registrar's Office for FERPA related questions.

Instructions

1. Complete the Applicant Information below and sign where indicated.
2. Obtain supervisor approval.
3. Email the completed form to **Laura Hallauer**: Laura.Hallauer@UToledo.edu
4. If selecting Requestor access, please be sure there are Approvers established for the index.
5. To review existing access by index or UTAD please run the applicable report in the Finance/Department folder of Web Report Library. Academic (non-hospital) indexes should use the report with Banner in the title.

Applicant Information:			
Name (Last, First, Middle Initial):			
Title/Position:			
College/Department:			
Rocket ID:		UTAD ID:	
Mail Stop:		Phone #:	
Employment Status:	<input type="checkbox"/> Faculty <input type="checkbox"/> Staff <input type="checkbox"/> Grad Assistant <input type="checkbox"/> Student Assistant		
Access Needed: Note: if access to more than 3 indexes is needed please use the Excel file Approver_Requestor_Template.xlsx. https://www.utoledo.edu/offices/controller/accounting_reporting/pdfs/Approver_RequestorTemplate.xlsx	Requestors are those initiating requisitions for the purchase of goods or services. Approvers then approve those requests. Requestors and Approvers should be separate individuals. Approver Level 1: purchases less than \$10,000 Approver Level 2: purchases between \$10,000 and \$25,000 Approver Level 3: purchases greater than \$25,000		
Index 1: <input style="width: 150px; height: 20px;" type="text"/>	Requestor	Approver-1	Approver-2 Approver-3 View Only
Index 2: <input style="width: 150px; height: 20px;" type="text"/>	Requestor	Approver-1	Approver-2 Approver-3 View Only
Index 3: <input style="width: 150px; height: 20px;" type="text"/>	Requestor	Approver-1	Approver-2 Approver-3 View Only
Indicate any additional access needed or other comments:			
User Signature & Date:			
Supervisor Approval:			
Print Name:			
Title/Position:			
Signature & Date:			