

UCSC - Financial Information System Access Form

(To be completed by employee's business office)

Important: Form must be filled out in [Adobe Reader](#) or Acrobat Professional 8.1 or above. To save completed forms, Acrobat Professional is required. For technical and accessibility assistance, contact the [Campus Controller's Office](#). Form questions: Email fis_probs@ucsc.edu

Section 1: General Information

Name:

Last Name,

First Name

Email:

Phone:

Division:

Campus Unit:

If employee has current FIS Banner access at another division, please note division here : _____

Please select UCSC status:

☐ Staff

☐ Student

☐ Faculty

☐ Temp/Other

Employee ID:

Effective Access Dates:

From:

☐ Temporary

To:

☐ Ongoing

Please select one:

☐ New Account

Change To

☐ Existing Account

Section 2: Query Access

Indicate the type(s) of inquiry the employee is authorized to perform:

- ☐ Acquisitions inquiry (Purchase Orders and Invoices, includes FOIDCH, 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.

Section 3: Journal Vouchers

Input: Select all that apply

☐ XTOE - Transfer of Expense (TOE)

☐ XTOF - Transfer of Funds - budgetary (TOF)

☐ XEPT / XEQT - Plant and Inventorial Equipment transfers

☐ XJVB / XPRA - Balance Sheet / Allowable Payroll Adjustment transfers

☐ XECG - Contracts & Grants / Special State Appropriations expense transfers

☐ XDCC - Contracts & Grants / Special State Appropriations budgetary transfers

☐ X032 - Purchase Order encumbrance liquidation

☐ XTAX / XPTX - Sales Tax accrual/Procard Sales Tax accrual

☐ _____

Section 3: Journal Vouchers *(continued)*

Use predecessor organization codes

Approvals: Select which types of journals employee is authorized to approve	\$ 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

Section 5: Authorization *All signatures are required*

FIS Divisional Access Authorizer and Primary Contact List is available here:

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

or Fax: 459-3601

or mail to FIS Account Administration Mailstop: Accounting Office