



INSTRUCTIONS:

Print this form and complete each field in the shaded area at the top of the form as well as any functional sections for which you are requesting access. Send a **signed copy** to the ITS Support Center, Kerr Room 54, (831)459-4357, Mailstop: ITS-Kerr or FAX #: (831) 459-4171.

Name of person needing AIS access	User Phone
User Job Title	User Email Address
AIS login (previous AIS login if applicable)	Unit/College
Supervisor Name:	Supervisor Email:

If new employee should have similar access to another in your unit, please list their name (if applicable):

If employee is replacing someone in your unit who no longer needs access, please list their name (if applicable):

Academic Advising and Curriculum Management (Check *all* that apply)

Advising Constituents

- Advise Undergraduate Students
- Advise Graduate Students

Advising Functions

- View Only Access
- Contact/Advise Admissions Applicants or Admits
- Assign/Release Negative Service Indicators (Holds)
- Assign Faculty or Staff Adviser
- Review Transfer Course Work
- Assign Student to Student Group
- Monitor Test Credit (Including Placement Exams)
- Approve College Changes
- Approve Individual Major
- Approve Study Plan
- Approve Changes to Requirement Terms (Catalog Rights)
- Approve Withdrawal, Leave of Absence and Readmission
- Approve Extension of Enrollment
- Approve Term Enrollment Minimum/Maximum Credits
- Monitor Academic Standing
- Monitor Disqualification from Major
- Substitute/Waive GE and College Requirements
- Substitute/Waive Department Requirements
- Track Milestone Completion (Senior Comprehensive)
- Honors Verification
- Graduation Verification

Curriculum Management

- Curriculum Management (College or Department)
- Schedule Courses and Gating
- Monitor Independent Studies
- Provide Permission Numbers (Prerequisites)
- Monitor Course Requisites
- Enroll Students
- Maintain Faculty Grade Sheets
- Coordinate courses for Faculty

Advising Setting

- College Adviser
- Department Adviser
- Divisional/School Adviser
- Student Affairs Adviser
- Graduate Division
- Other _____

Undergraduate Admissions (Please check *all* that apply)

- Applicant Test Scores Incoming applicant evaluation information Academic interest information
 External test score processing Student group access Describe Student group Access _____

Please list Business Need/Reason for Access to Undergraduate Admissions: _____

Graduate Admissions (Please check *all* that apply)

- GARP** (Graduate Application Review Portal) – see http://graddiv.ucsc.edu/admissions/GARP_Security_Descriptions.pdf for role descriptions
- Primary Role(s): Dept Admin Faculty Reviewer
Add-on Role(s): Set Decisions Add-on Reviewer Comments Add-on

Please list Business Need/Reason for Access to GARP: _____

- Graduate Admissions** - AIS data (typically only approved for users in the Division of Graduate Studies)
- View Update N/A

Please list Business Need/Reason for Access to Graduate Admissions outside of GARP/Reporting: _____

Student Business Services/Student Financials

Please list Business Need/Reason for Access to Student Financials: _____

Does business need include ability to post charges to accounts? Yes No

If you answered Yes, please check the appropriate box below to indicate what area/unit you work in:

- TAPS OPERS Health Center Housing FSH FA Orientation Summer Session
 Registrar Other _____

Or, indicate what items type(s) you will be posting: _____

HIPAA training is required for SF access. Proof of completion must be provided to the SBS office. Contact the office at askteamsbs@ucsc.edu in order to obtain training and/or for instructions on how to submit proof of completion.

If the access approved includes posting capabilities, you must receive training from SBS on the posting screens. Send email to askteamsbs@ucsc.edu requesting training.

Financial Aid (Check *all* that apply)

- GAANN Grant Administration Academic Resource Center/EOP Campus Housing Office
 Other _____

Please list Business Need/Reason for Access to Financial Aid: _____

Student Records (Indicate if you need update or view access for *all* that apply)

- View Update Checklists View Update Service Indicators View Student Program/Plan (Student field of study)
- View Update Grade Rosters View Update Class Rosters View Update Addresses
- View Update Email View Update Phone Operational Calendar
- View Update Bio Demo View Student DOB (Provide business need below) View Student SSN (Provide business need below)

Please list Business Need/Reason for Access to Student Records: _____

Cognos Upfront Cubes and Reports (Please check *all* that apply)

We offer staff access to AIS data using the Cognos reporting tools UpFront, Impromptu, and PowerPlay. To obtain Cognos UpFront access, attend the Intro to AIS Reporting class. You will receive your User ID and password shortly thereafter.

- What type of user are you? Staff Faculty
- Have you attended the [Intro to AIS](#) class? Yes No
- Have you attended the [Intro to AIS Reporting](#) class? Yes No
- Do you need to view full SSN? Yes No Do you need to view full Date of Birth? Yes No

If you indicated that you need to view full SSN or full Date of Birth, please provide a business reason: _____

Please check any additional classes you are interested in taking. (Click the link to view the available class times)

- [Advanced Cognos Methods](#)
- Report [Writers Seminar](#)
- [Advanced Report Writers Seminar](#)

If you have completed the Intro to AIS Reporting class, please indicate which additional areas of Cognos Upfront you will need access to.

- [Admissions](#)
- [Financial Aid](#)
- [Student Financials](#)

You will need to contact the Team Lead for any of the above areas to ask for access permission. The Team Lead will then send an e-mail to ais-reports-help@ucsc.edu if permission is to be granted. Click the link for Admissions, Financial Aid and Student Financials to send email to the Team Lead.

Access to AIS requires that you take the FERPA training. If you have not taken the FERPA training, please visit the Registrar's website: <http://reg.ucsc.edu/guidelines.html>

AGREEMENT: My signature on this application constitutes my receipt of and intention to comply with the University policies, which govern the user of this account. All administrative systems account holders must have a signed "Access to Information Statement" form on file. I also understand that I am responsible for any and all service/authorization requests and I will not disclose or release my password in any manner. (All applicants must sign below.)

Applicant Signature: _____ Date: _____

AUTHORIZATION: My signature on this application constitutes verification of the need for this employee to have access to the AIS System functions above. All functions selected coincide with the employee's work duties. I also understand that I am responsible for notifying AIS and Campus Main Computing when this employee no longer requires access to either the system or functional selected above. (All authorizers must sign below.)

Supervisor Signature: _____ Phone: _____ Date: _____

IT Accounts Office Use:

Create Bio Demo in IDM: _____ Date: _____ Login: _____