

University of Oregon IDR Access Form – Finance & HR Data

Use this form to request additional Finance and HR data. You must have already completed the [Business Application Access Request](#). After approval from your Department Head, **send this form to the Data Owner indicated** for the data you are requesting. See page two of this form or <https://service.uoregon.edu/TDClient/2030/Portal/KB/ArticleDet?ID=78759> for definitions of each of the items listed below.

Requestor and General Information

Name: _____ UO ID: _____ Office Phone: _____
 Department: _____ Job Title: _____
 Email Address: _____
 Requestor Signature: _____ Date: _____

Contact Information Requested

Contact Information included in Core data: Employee UO address, phone, and email. Vendor address, phone, and email. Last 4 of Student IDs.

<input type="checkbox"/> Common Employee & Vendor: Core plus Employee mailing and permanent contact info; Vendor mailing contact info.	HR Data Owner Signature _____	Date: _____
<input type="checkbox"/> All Employee & Vendor: Core plus all Employee & Vendor contact info.	_____	_____
<input type="checkbox"/> Student Detail within Finance/HR Reports: Core plus Student name, full ID, mailing and permanent contact info, and UO email.	Student Data Owner Signature _____	Date: _____

Finance Data Requested

<input type="checkbox"/> Sensitive Finance (bank, collection agency) <input type="checkbox"/> Private Finance (SSN, tax ID, bank account)	<input type="checkbox"/> Sensitive A/R (charges, payments, deposits, disbursements, holds, degree, ethnicity, race, visa, etc.) <input type="checkbox"/> Private A/R (tax ID)
Finance Data Owner Signature: _____	Date: _____

HR Data Requested

<input type="checkbox"/> Sensitive HR (ethnicity, race, citizenship, visa, veteran status, benefits, deductions, taxes, leaves, etc.)	<input type="checkbox"/> Private HR (tax ID, beneficiary tax ID)
HR Data Owner Signature: _____	Date: _____

For each box checked, describe your business reason for requesting this access:

Department Head Approval

I confirm that this employee requires additional access within Integrated Data and Reporting (IDR) to perform the duties of their position. I understand that this access includes the data indicated above.

_____ Dean/Department Head Approval (Signature)	_____ Dean/Department Head Approval (Printed)	_____ Date
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Department Head: Please route to Data Owners listed above for required signature.

Information Services Only

Username: _____ **Completed by:** _____ **Date:** _____

IDR Access Form Information

Data Owner Signatures

For any data requested, other than Core data, please route your form to the appropriate data owner for approval:

- **Finance** – Mark McCulloch, Director of Business Affairs Office Information Systems
- **HR** – Catherine Bonomini-Smith, Senior Associate Director, HR Operations
- **Student** – Julia Pomerenk, Asst VP and University Registrar

Data Definitions

The results you see on Cognos reports within the Finance & HR modules will be filtered by the contact information for which you are approved. For example, if a report contains a Vendor Mailing address (MA) and you are not approved for Vendor Mailing addresses, that information will be blank on your report.

If you require any of the contact information listed below, please apply for that access.

Contact Information

- **Core Contact Information – Automatically granted with Core data**
 - **Employee UO** and **Vendor VO, VP and VR** address, phone and email
 - VO is Vendor Orders, VP is Vendor Payments and VR is Vendor Remit
- **Common Employee & Vendor**
 - **Core** plus **Employee MA, PR** and **Vendor MA, PR** address, phone and email
 - MA is Mailing and PR is Permanent
- **All Employee and Vendor**
 - **Core** plus **Employee & Vendor** contact info
- **Student Detail within Finance/HR Reports**
 - **Student unmasked name** and **ID; MA, PR** address, phone and UO email
 - MA is Mailing and PR is Permanent

Additional Data

- **Core Data** includes all Banner data from Finance, HR and Student that isn't deemed sensitive or private. Examples are departmental budgets, grants, payroll, employee positions, course catalog, faculty assignments
- **Sensitive Finance** includes bank and collection agency data
- **Private Finance** includes SSN, tax ID, bank account
- **Sensitive AR** includes charges, payments, disbursements, deposits, holds, degree, ethnicity, race, veteran, athletics, visa, tax
- **Private AR** includes tax ID
- **Sensitive HR** includes ethnicity, race, citizenship, veteran status, benefits, deductions, visa, taxes, leaves, degrees, employment history, academic outcomes
- **Private HR** includes tax ID, beneficiary tax ID