Gportal Financial Aid
Business Process Guide

Rev. 0

May 2007
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</table>
PeopleSoft Gportal Financial Aid

This document covers the basic steps related to awarding RA/TA, UGF and Fellowship Awards. Some of the items are covered briefly because we assume you have taken the following online training classes (if not please take them in the next day or two):

- OASIS: FERPA Refresher
- OASIS: General Navigation in PeopleSoft

To enroll in the class, log into the Blackboard system and click on the “Courses” tab. Next, type OASIS in the Course Search box and click the “GO!” button. Finally, locate the courses listed above and begin your journey through the OASIS system.

Agenda

- Find Students who will be given awards
- Grant an RA/TA award
- Grant a UGF award
- Grant a Fellowship
Navigating to the Gportal Financial Aid Functions

Before you can begin any work, you must login to the system.

The link to do so is https://hrsa.oasis.asu.edu/
You should see a login screen similar to the one below:
This is the PeopleSoft Home Page.
To access the Gportal Financial Aid pages, you start by clicking on the *ASU Customization* menu item.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click on <strong>ASU Customizations</strong></td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td></td>
<td>Click on the <strong>Gportal for Financial Aid</strong> link</td>
</tr>
</tbody>
</table>
This is where you search for students.

You must fill in three or more fields before searching.

If you are searching for students who do NOT have awards yet, you must fill in at least one of the Academic Program, Plan or Organization fields.

For any field with a magnifying glass next to it, click on the magnifying glass to see a list of acceptable values for that field. When the list appears, you simply click on the item on the list to enter it in the field.

Once you have entered the data that you know about the student, click on Search.

On the next few pages we will show you one example of using the lists to find data.
Step | Action
--- | ---
| Click on Advanced Lookup |

Each time you click on a magnifying glass, you will be presented with a list of the valid items for that field.

In this case, we clicked on the magnifying glass next two Academic Org, and got a list of 215 academic Orgs to choose from.

Let's say in our example that we want to select electrical engineering.

We can scroll through the list, or we can do an advanced search, to shorten the list a bit. For this example, click on the Advanced Search link.
Table: Look Up Academic Organization

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Type the search criteria into the field.</td>
</tr>
</tbody>
</table>

We want to list only those organizations that have "eng" in their description, so that we can find the electrical engineering department.
Step | Action
---|---
| Change the comparator field from "begins with" to "contains" (optional)

You can switch the comparator field so that you search for fields with letters at the beginning, end or even in the middle.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click on <strong>Look Up</strong></td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
 | Click on the Academic Org of your choice.
You will continue to fill in the search fields in the same manner.

In this example, we have chosen to search for students in the Electrical Engineering Department, for the Fall 2007 term, with an Aid year of 2008 who have no award.

Once you set the fields the way you want, click on Search
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click on <strong>Financial Detail</strong></td>
</tr>
</tbody>
</table>

This is the results from the search settings in the previous screen.

Notice that in the upper right corner of the table how there are 531 entries, but you are only looking at the first 9.

You can use the links in the upper right corner of the table to see more data.

When you find your student, click on **Financial Details**
Click on Edit Award

This screen shows the data about the student.

At the bottom of the screen is where any awards for the student are displayed.

To add an award, you will click on the *Edit Awards* link.
Type in the term and tab out of the field.

The next step is to identify the term that the award will relate to.

In this example, the award(s) are for Fall 2007.

Type 2077 (the code for fall 2007) in the term field, and press Tab.

Type 2077 and press Tab
Notice that there are three tabs. To record different awards, you would click on the tab you want. For our example, we will first record an RA/TA award, so we will stay on the first tab. You can select whether or not the Student needs TA orientation. In this example, let's check the box.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select the TA Orientation Required check box (if desired)</td>
</tr>
</tbody>
</table>
**Step** | **Action**
--- | ---
Choose an advisor

The Start Dates indicate the week an award goes into effect. This field coincides with the Time Period.

Click on the “Plus Option” in the RA/TA Term area to add an award to a semester. The Award Detail Plus and Minus options is the area to add the award and then it is viewed in the Award Detail.

Te Plus and Minus option in the Award Detail area will add an effective sequence. It should be noted that you cannot delete an award with the minus option. All awards are recorded. The FTE Detail is the area to add the RA/TA Award.
You can record multiple RA/TA awards given to one student by clicking on the plus option on the FTE Detail area. You cannot delete an award, but you can modify it by adding a new field of information.

We have a temporary work around to speed up the search. This work around will be in place until the system is upgraded in 2008. If you type a 9 in the field, and click on the magnifying glass, you will quickly get to the search page where you can search for the advisor.
Delete the 9, type the last name in the *Last Name* field and click on **Look Up**
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select the advisor from the list.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td></td>
<td>Type the percentage of full time in the FTE% field</td>
</tr>
<tr>
<td></td>
<td>Enter a start date</td>
</tr>
<tr>
<td></td>
<td>Select a Department (click on the magnifying glass.)</td>
</tr>
<tr>
<td></td>
<td>Click Save when you have set your data correctly.</td>
</tr>
</tbody>
</table>
Award an UGF

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click on the <strong>UGF Tab</strong></td>
</tr>
</tbody>
</table>

(Explanation of the 3 plus signs.)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Type in the Term and press Tab</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
 | Type in the dollar amount of the allocation in the *Total Allocation* field and press Tab.
 | Click Save.

(Explanation of the plus signs.)
Record a Fellowship

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click on the <strong>Fellowship</strong> tab</td>
</tr>
</tbody>
</table>

This function is to record any fellowship award a student has received from the unit, the college, by Graduate Education or at the national level…….
Use the magnifying glass to show the valid values for Aid Year and Agency code.

You will choose the Agency Code from a drop-down menu to select the fellowship. If the name of a fellowship is not listed, contact the Graduate Education so they can assign an agency code.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Input the <strong>Academic Advisor</strong></td>
</tr>
<tr>
<td></td>
<td>Type in the <strong>Amount for Aid Year</strong></td>
</tr>
<tr>
<td></td>
<td>(optional) Click on the <strong>Multi-Year Award</strong> (if appropriate)</td>
</tr>
<tr>
<td></td>
<td>Click on <strong>Save</strong></td>
</tr>
</tbody>
</table>

This is the end of the procedure.
FERPA

The purpose of this lesson is to provide an introduction to FERPA and the disclosure of student information. Much of this information has been excerpted from the Office of the Registrar website (http://www.asu.edu/registrar).

GENERAL INFORMATION
The federal Family Educational Rights and Privacy Act (also known as FERPA, and/or the Buckley Amendment) afford students certain rights with respect to their education records. They are:

1. **The right to inspect and review the student’s education records within 45 days of the day the university receives a request for access.**
   Students should submit to the registrar, dean, head of the academic department, or other appropriate official, written requests that identify the record(s) they wish to inspect. The university official will make arrangements for access and notify the student of the time and place where the records may be inspected. If the records are not maintained by the university official to whom the request was submitted, that official shall advise the student of the correct official to whom the request should be addressed. **Note: Students must provide photo identification in order to access their education records.**

2. **The right to request the amendment of the student’s education records that the student believes is inaccurate or misleading.**
   Students who believe their record is inaccurate or misleading should write to the university official responsible for the record. Clearly identify the part of the record they want changed, and specify why it is inaccurate or misleading.
   If the university decides not to amend the record as requested by the student, the university will notify the student of the decision and advise the student of his or her right to a hearing about the request for amendment. Additional information about the hearing procedures will be provided to the student when notified of the right to a hearing. **Note: FERPA does not address grade disputes or grievances, which are pursued through other university and/or college procedures.**

3. **The right to consent to disclosures of personally identifiable information contained in the student’s education records, except to the extent that FERPA authorizes disclosure without consent.**
   One exception which permits disclosure without consent is disclosure to school officials with legitimate educational interests. A school official is a person employed by the university in an administrative, professional, supervisory, academic, research, or support position; staff in the Alumni Association and ASU Foundation offices; a person or company with whom the university has contracted (such as an attorney, auditor or collection agency); a person serving on the Board of Regents; or a student serving on an official committee, such as a disciplinary or grievance committee, or assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility. **Note: A parent of a dependent student may challenge denial of access to the dependent student’s record by producing the most current copy of Internal Revenue Form 1040. (Dependency is defined in Section 152 of the Internal Revenue Code.) If that form lists the student in question as a dependent, the parent will be required to sign an Affidavit of Dependency which affirms that the student is his/her tax dependent. The affidavit will be retained by the University Registrar’s Office, and must be renewed each tax year.**

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Receipt of these documents, the dependent student records will be made available to the parent as specified under FERPA.

4. The right to file a complaint with the U.S. Department of Education concerning alleged failures by Arizona State University to comply with the requirements of FERPA.

Students are encouraged to first contact the University Registrar’s Administrative Office at (480) 965-7302. A complaint may be filed with the Department of Education at the following address:

**Family Policy Compliance Office**

U.S. Department of Education  
400 Maryland Avenue, SW  
Washington, DC, 20202-4605

NOTE: While FERPA applies only to students (as opposed to applicants), ASU employees are urged to err on the side of caution whenever disclosing information. When in doubt, do not disclose the information and refer to your supervisor or the Office of the Registrar as appropriate.

Now that you know what FERPA is, how can you tell if the student has elected to place a FERPA hold on their record? The answer lies on the page displayed below:

![FERPA privacy shade](image)

When you apply FERPA control to restrict data for a student, the system attaches a FERPA window shade privacy button to that individual's records in your database. This icon indicates the student has a FERPA hold on their record. You can click the icon to see the specific information about the hold.
Terminology and Shortcuts

SIS to PeopleSoft

Some of the common fields you have used in SIS will have new names in PeopleSoft:

<table>
<thead>
<tr>
<th>SIS</th>
<th>PeopleSoft</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASU ID</td>
<td>Campus ID</td>
</tr>
<tr>
<td>Affiliate ID</td>
<td>ID</td>
</tr>
<tr>
<td>SSN</td>
<td>National ID</td>
</tr>
</tbody>
</table>

Common Values

Some of the common fields you have used in SIS will have new names in PeopleSoft:

<table>
<thead>
<tr>
<th>Field</th>
<th>Common Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Institution</td>
<td>ASU00</td>
</tr>
<tr>
<td>Term</td>
<td>2077 (Fall 2007)</td>
</tr>
<tr>
<td></td>
<td>2081 (Spring 2008)</td>
</tr>
<tr>
<td></td>
<td>2084 (Summer 2008)</td>
</tr>
<tr>
<td></td>
<td>2079 (Winter 2007)</td>
</tr>
<tr>
<td>Academic Career</td>
<td>UGRD or GRAD</td>
</tr>
</tbody>
</table>

Moving Among Fields

To move among the data-entry fields on a page, press the tab key or click the field once. Pressing tab moves you one field at a time in a sequence determined in the page definition. Pressing tab also rests on prompts to give you the option of viewing the prompt table or calendar. To open a prompt or calendar, you can press enter. Or, to get to the next field, press tab again. Press Shift Tab to move backward rather than forward in the tabbing order.
**Required Fields**
In most applications, required fields are marked with an asterisk. You must enter data into that field to continue on to the next field or save the page. If you save the page without entering required data, the field turns red and an error message appears on the page. Click OK within the error message, and then enter the correct data in that field. Required fields are often drop-down list boxes or are accompanied by a prompt button to help you enter the correct data.

**Navigating through different areas**
The following table describes the buttons and links that might appear on your grid or scroll area.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Add</td>
<td>Click to insert a new row after the current row.</td>
</tr>
<tr>
<td>− Delete</td>
<td>Click to delete the current row of data.</td>
</tr>
<tr>
<td>(Show Next Row)</td>
<td>Click to display the next row or set of rows of data.</td>
</tr>
<tr>
<td>Note.</td>
<td>The Show Next Row and Show Previous Row buttons are disabled if you are viewing all rows of data.</td>
</tr>
<tr>
<td>(Show Previous Row)</td>
<td>Click to display the previous row or set of rows of data.</td>
</tr>
<tr>
<td>(Show All Columns)</td>
<td>In a tabbed grid only, click to expand grid columns to the right so that tabs are no longer needed.</td>
</tr>
<tr>
<td>(Show Tabs)</td>
<td>In a tabbed grid only, click to return the expanded grid to its tabbed state.</td>
</tr>
<tr>
<td>Customize</td>
<td>Click to access the customization page for that grid, which enables you to sort by column and reorder, hide, and freeze columns.</td>
</tr>
<tr>
<td>(Download)</td>
<td>Click to display a new browser window, showing the contents of the grid in a spreadsheet-like format.</td>
</tr>
<tr>
<td>View All</td>
<td>Click to display the maximum number of rows available to be viewed at once on a page. When this feature is enabled, the link morphs to read View x so that you can return to the original setting. The value of x can change, and is set by the application developer.</td>
</tr>
<tr>
<td>Find</td>
<td>Click to find a row of data containing a specified search string.</td>
</tr>
<tr>
<td>First</td>
<td>Click to access the first row or set of rows of data.</td>
</tr>
<tr>
<td>Note.</td>
<td>The First and Last links are not available if you are viewing all rows at once, in which case you scroll to see your data.</td>
</tr>
<tr>
<td>Last</td>
<td>Click to access the last row or set of rows of data.</td>
</tr>
</tbody>
</table>
Key board Shortcuts

There are also keyboard shortcuts for all of the above buttons and links listed below:

(Hot keys perform immediate actions. When you press one, the designated action occurs. Note that several hot keys perform different functions depending on the page that you are on, such as a transaction page or a search page.)

- **ALT+1**  
  Saves a page in a transaction.
  
  Moves to the Search or Add button on a search or look up page.

- **ALT+2**  
  Returns to the search page from the transaction page.

- **ALT+3**  
  View the next row in the list when the button is active.

- **ALT+4**  
  View the previous row the in list when the button is active.

- **ALT+5**  
  Accesses the Look Up page.

- **ALT+6**  
  Opens the calendar prompt.

- **ALT+7**  
  Opens the pop-up window on a page.

- **ALT+8**  
  Inserts a row in a grid or scroll area.

- **ALT+0**  
  Deletes a row in a grid or scroll area.

- **ALT+.**  
  When in Expert Entry mode, activates the Refresh button, which validates the data entered on the page.

- **ALT+,**  
  View the next set of rows in a grid or scroll area.

- **ALT/-**  
  View a previous set of rows in a grid or scroll area.

- **ALT+/**  
  Finds data in a grid or scroll area.

- **ALT+’**  
  View all rows of data in a grid, scroll area, or search page results list.

- **ALT+\**  
  Toggles between Add a New Value and Find an Existing Value on a search page.

- **CTRL+J**  
  Displays the system information page.

- **CTRL+K**  
  When on a search or transaction page, accesses a page with a list of keyboard navigation shortcuts using hot keys and access keys.

- **CTRL+Y**  
  Toggles the menu pagelet between collapse and expand.

- **CTRL+TAB**  
  Toggles the focus through the frame set.

- **ENTER**  
  Activates the OK button, where appropriate.

On a search page, activates the Search button.

On a look up page, activates the lookup button.

- **ESC**  
  Activates the Cancel button, where appropriate.

One last important item to know is the online Help. There is a link in the upper right hand corner that says “Help” and this link will take you to the help topic related to the page you are currently working with. You must be in the element for the help topic to be connected.
Glossary

academic career - In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution - In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization - In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan - In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program - In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

administrative function - In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type - In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish different types of applications such as first-year applications, transfer applications and readmitted applications.

campus - In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit that belongs to a single academic institution that uses a unique course catalog and that produces a common transcript for students within the same academic career.

category - In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

checklist code - In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
course - In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

effective date - A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

inquiry access - In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

institution - In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

personal portfolio - In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

primary name type - In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

prospects - In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

QBU (Query Based Update) a process in PeopleSoft that runs overnight which identifies a select population of applicants and performs predefined actions on the population. There are many different QBU processes running every night.

search/match - In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

service impact - In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator - In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

update access - In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.
Next steps

In order to get access to PeopleSoft, you must complete these steps:

1. **Complete the on-line FERPA training**
   a. Log into Blackboard from the ASU homepage. Click on “ASU Interactive”, then the “MyASU Courses” link. The blackboard login screen will appear. Log in with your ASURITE ID and password.
   b. Click on the Courses tab in the upper left corner of the screen.
   c. In the search field, type in OASIS, and click search.
   d. Available courses will be listed, click on the enroll button on the far right side of the page for the OASIS: FERPA refresher course.
   e. Click Submit.
   f. Click OK.
   g. This will put you into the FERPA class.
   h. You must score at least 140 points on the test to get credit for the class. You can take the test multiple times.

2. **Set your user profile in the PeopleSoft System**
   a. Log in to the PeopleSoft system
      i. [https://hrsa.oasis.asu.edu/](https://hrsa.oasis.asu.edu/)
      ii. Log in with your ASU RITE ID and network password.
      iii. The system will create your user profile
   b. Click the “Sign out” link to log out.

3. **Apply for access to Peoplesoft;**

   This class makes you eligible for these roles:

   **TBD**

   Be sure to include specific information about your job responsibilities so the data trustee will have the necessary information to approve your request.

   Here is the link to apply for access: [https://ep.oasis.asu.edu/](https://ep.oasis.asu.edu/)

   Here are step by step instructions for how to apply: [http://www.asu.edu/oasis/support/documents/RequestAccessForYourself.pdf](http://www.asu.edu/oasis/support/documents/RequestAccessForYourself.pdf)

   Here is a link to all of the different instructions related to this process. [http://www.asu.edu/oasis/support/Access.html](http://www.asu.edu/oasis/support/Access.html)
What will happen next?
After you request access:
1) Your supervisor will get an email and will go into the system to approve your request.
2) You will get an email and go into the system to acknowledge your new role.
3) The data trustee will go into the system and ensure that your job responsibilities require the roles you requested and verify that you have had the correct training. and everything looks correct
4) The OASIS security team will complete your request and grant you access
5) You and your supervisor will get an email notifying you of your new access.

Here’s what you can do to speed your request and save time for everyone who is part of the manual process behind the electronic form.

1. Spend a couple of minutes and look at the description of the role you are requesting. Check the roles you need or that employee will need. Avoid asking for update access to items that are outside your area of responsibility.
2. Include information in the comments field. Give a good description of why you need the access you are requesting. Include your department or unit. In the future, the security process will know the department where you work but this will not happen until the human resources job data is converted. If you don’t give your department, the data trustee may need to research that before granting you access.
3. Watch the process of your request. Using the on-line system you can tell the steps that have been completed for your request.

Remember the project wants everyone equipped to do their job and be prepared to do it in the new system. The data trustees are advancing toward this goal by being important members of the project teams as well as serving as a data trustee. And finally, we will work to improve the access process as we adapt to the new system.

Questions? Email the Oasis security team

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