

**User Information**

Last Name:	First Name:
Employee ID (9 digits, not SSN):	CSUMB Email:
Dept ID (4 digits) or name:	CSUMB Phone Number:
Dept name:	Dept Contact (if other than user):

**Primary Campus Affiliation:**

CSUMB Staff	University Corporation Staff	Student Assistant
Faculty	POI (3 <sup>rd</sup> Party, Consultant, Vendor, etc.)	Other: _____

**Access Type**

<b>New User – No Previous Access to CFS</b> <i>Select this option if you have never had access to CFS before. Please select all the roles &amp; units you need access to.</i>	<b>Modify or Update Existing Access</b> <i>Select this option if you have access to CFS, but need to modify your role. Please select all the roles you currently have &amp; any new roles needed.</i>
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**Business Unit(s)**

<b>MB000</b> – CSUMB	<b>MB075</b> – Corporation	<b>MB104</b> - Foundation	<b>MB112</b> - Otter Student Union
<b>MBCSU</b> – Monterey Bay CSU BU <i>(Finance Service Providers Only)</i>	<b>MBGAP</b> – Monterey Bay GAAP BU <i>(Finance Service Providers Only)</i>		

**Access Roles for CSUMB Departments**

<b>Data Warehouse/COA/Finance Inquiry</b> <i>This security role provides all necessary Finance inquiry access for department administrative users in CFS including Finance Data Warehouse and Chart of Accounts (COA).</i>	<b>Create Purchase Requisitions</b> <i>This security role provides access to create purchase requisitions.</i>	<b>Have you completed these trainings?</b> <div style="text-align: right; margin-bottom: 5px;"> <u>Yes</u>      <u>No</u> </div>
<b>ProCard</b> <i>This security role provides all necessary access for CSUMB ProCard users to maintain purchasing information and update card holder transactions and perform reconciliations.</i>	<b>Budget Transfers* (MB000 Only)</b> <i>Training Required. This security role provides access to enter budget transfers journal entries.</i>	<b>Data Warehouse</b> <b>Chart of Accounts</b> <b>Requisitions</b> <b>Budget Transfers *</b> <i>*Required. Budget Transfer access will be provided once OSI is notified that training is complete. Check your email for an invitation to the training.</i>
<b>AR/BI (MB000 Only)</b> <i>This security role provides inquiry access to Accounts Receivable/Billing</i>		

**Access Roles for Finance Service Providers (For Finance Roles Only)**

<b>Accounting &amp; AP (MB000)</b> Accounting Director Accounting Manager GAAP Accountant GL Accountant Asset Accountant Post Journal Entries A/P Lead A/P Technician Print Checks	<b>Accounting &amp; AP (MB075, MB104, MB112)</b> Accounting Management Asset Accountant Grants Accountant Accounts Receivable Accountant Billing Accountant Accountant Post Journal Entries Admin Integration A/P Technician Print Checks	<b>Purchasing Roles (All Units)</b> Procurement Director Buyer / Contracts Analyst Procurement Assistant Property Receiving Vendor Management
<b>Budget Roles (MB000)</b> Director of Budget & Planning Lead Budget Analyst Budget Analyst Student Fees Manager Student Fees User	<b>Other Roles (All Units)</b> OSI Analyst – Finance CFS Security LCD Dashboard IT – IB Support & Process Scheduler	<b>Student Assistant (All Units)</b> Accounts Payable General Ledger Purchase Orders
		<b>Additional Instructions:</b>

**Name of a Person with the Same Role (Optional):**
**Signatures**

<b>Employee Signature:</b>	<b>Date:</b>
<b>Manager Signature:</b>	<b>Date:</b>
<b>Manager Name:</b>	

Return this signed & completed form to the Operations Support and Innovation Department at [osi@csumb.edu](mailto:osi@csumb.edu) via email attachment (preferred) or as a Certified Recipient (no additional authentication) in Adobe Sign. For any questions or issues with completing the form, contact OSI.