Banner Account Request Form Directions & FAQ

Revision 021011

Step 1

To request Banner user access for a new staff member or modify the access of an existing staff member, complete the Banner Account Request Form, found online [HERE](#).

**Q:** Do I complete this form to request an ASAP account/Banner ID Number/Email Account/Network Account?

**A:** No. This form is intended to be used in requesting user access to our various campus Student Information Systems. Questions about other systems, including ASAP, network accounts, and UTSA email accounts, please contact OIT Support Services.

**Q:** I’m in the process of hiring a new staff member. At what point can I submit the Banner Account Request Form?

**A:** You can submit the form once the staff member has been issued a Banner ID number. However, the Banner Security Team will not process the request until the staff member has:

a.) officially started employment;
b.) been issued network access;
c.) been issued a staff email account (@UTSA.edu);
d.) successfully completed the Banner Users & FERPA Compliance Awareness Module (CT927).

**Q:** My new staff member is a work-study and will not get a staff email account. How will they be notified when their Banner account is ready?

**A:** Work-studies not issued an @UTSA.edu email address will be notified by emailing their supervisor (as listed on the request form). However, the work-study will still need to complete the required Banner Users & FERPA Compliance Awareness Module (CT927) before the account is released, and the work-study will need to login to RowdySpace with their own network ID in order to retrieve the temporary password.

**Q:** I submitted a form for my new staff a week ago. Why doesn’t he/she have an account yet?

**A:** You can call or email the Banner Security Team to check the status of a completed form. Forms are typically processed within 2 business days of being received.

**Q:** Can I fax my request?

**A:** No, faxed forms are not accepted. However, completed forms can be submitted to the Banner Security Team in person ([Main Campus, Office of the Registrar, JPL 1.01.14](#)), by Campus Mail ([Banner Security, Office of the Registrar](#)), or by email as a PDF document ([BannerSupport@UTSA.edu](#)).
Step 2

Complete Parts 1 and 2 of the Banner Account Request Form online before printing.

**Part 1: User Information**
Type in the information of the new user requesting access. A user must be appointed and issued a Banner ID number before a Banner Account Request Form will be processed.

**Part 2: Access Requested**
Though the Banner Security Team only creates/modifies/deletes Banner accounts, we do begin the process for other accounts as listed on the form.

*Profiles Requested (optional)* — If you know specifically the profile the user should be using, enter that in the space provided. This is not a mandatory field. If you wish to make adjustments to an account from a copied user (see next question), you can type in the adjustments here.

*Copy Current User (required)* — Type in the name and Banner ID of an existing and active Banner user within your department that you want to copy access. If you do not wish to replicate a current users’ access exactly, please contact the Banner Security Team.

If only basic, query-only access is required, you can request a BASIC STUDENT account. Basic Student Accounts do not require Department or Data Custodian signatures. However, it is up to the discretion of Banner Security what type of access a Basic Student Account has.

**Q:** What profile should I request?

**A:** A profile is not necessary if there is a user within your department with access you can copy. If the new staff is replacing a Banner user who has left UTSA, we may still be able to match access. If there is not a Banner user within your department that can be copied, contact the *Banner Security Team*. If only basic, query-only access is required, a BASIC STUDENT account can be requested.

**Q:** I have very specific access needs and/or need to clarify something. How do I include this on the form?

**A:** You are more than welcome to write additional information where there is clear space on the form, including the *Profiles Requested* line in Part 2.

**Q:** What if I need to add/subtract access later?

**A:** Contact the Banner Security Team. Depending on your situation, we may need you to submit a new Banner Account Request Form.

**Q:** What if the user I want to copy is no longer in our office?

**A:** If the Copy User has separated from UTSA within 90 days, we will usually still have their profile on record and be able to copy it. If the Copy User’s account has already been cleaned, we will contact you for more information. If the Copy User has transferred to another department at UTSA, please determine a different Copy User.
Step 3

Once all the required information is typed in, print the form. The new user will need to sign under Part 3: Compliance. All Banner users are required to read and agree to the FERPA and compliance guidelines before an account will be issued.

Additionally, the requested user must successfully complete of the Banner Users & FERPA Compliance Awareness Module (CT927) before a Banner User Account will be released.

Step 4

Proper authorization is required for Banner access to be issued.

*Employee/User and Supervisor signatures* are absolutely required for any level of Banner access.

The *Department Custodian* will depend upon the position and department of the user. If your Department is not represented by the list below, please contact the *Banner Security Team*.

<table>
<thead>
<tr>
<th>Department and/or Profile Types</th>
<th>Signature required for…</th>
<th>Primary Department Custodian</th>
<th>Typical Data Custodian(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Department Staff/Faculty</td>
<td>Anyone requesting access to Faculty classes/objects</td>
<td>Bennie Keckler</td>
<td>REG</td>
</tr>
<tr>
<td>Admissions</td>
<td>Anyone working in Admissions</td>
<td>Jamie Satterwhite or Cindy Dermody</td>
<td>REG</td>
</tr>
<tr>
<td>Athletics</td>
<td>Anyone working in Athletics/Athletics Advising</td>
<td>Colin Howlett</td>
<td>REG</td>
</tr>
<tr>
<td>Basic Access/Basic Student/Basic+FERPA</td>
<td>Anyone requesting query only access to basic Banner forms</td>
<td>Not Required</td>
<td>--</td>
</tr>
<tr>
<td>Business Auxiliary Services/Parking/UTSACard Office</td>
<td>Anyone working in BAS/Parking/Card Office</td>
<td>Clay Haverland</td>
<td>FS</td>
</tr>
<tr>
<td>Counseling Services</td>
<td>Anyone working in Counseling Services</td>
<td>N/A</td>
<td>REG</td>
</tr>
<tr>
<td>Disability Services</td>
<td>Anyone working in Disability Services</td>
<td>Diane Hengst</td>
<td>REG</td>
</tr>
<tr>
<td>Graduate School</td>
<td>Anyone working in Graduate School</td>
<td>Monica Rodriguez</td>
<td>REG</td>
</tr>
<tr>
<td>Health Services</td>
<td>Anyone working in Health Services</td>
<td>N/A</td>
<td>REG</td>
</tr>
<tr>
<td>Housing</td>
<td>Anyone working in Housing</td>
<td>Lionel Maten</td>
<td>FS/REG</td>
</tr>
<tr>
<td>Human Resources</td>
<td>Anyone working in HR</td>
<td>N/A</td>
<td>REG</td>
</tr>
</tbody>
</table>
The **Data Custodian** will depend upon the access requested. This should be determined by the Department Custodian before authorization. The Data Custodians will also serve as Department Custodians for users within their office, and can authorize requests if a Department Custodian is not determined or unavailable. If you are unsure who the proper Data Custodian is for the access requested, forward the form to Banner Security, and we will determine the correct Data Custodian.

### Data Custodians
- **Financial Aid** – Lisa Blazer or Gabriel Mendiola
- **Fiscal Services** – Gary Lott or Stacie Garza
- **Registrar** – Sally Bench or Bryan Heard

### Step 5

**Send in the form.**

**COMPLETED FORMS SHOULD BE SUBMITTED TO:**
- **Banner Security Team**
- **Office of the Registrar**
- **JPL 1.01.14 – Main Campus**
- **BannerSupport@UTSA.edu**

**Q:** Can I fax my request?

**A:** No, faxed forms are not accepted. However, completed forms **can** be submitted to the Banner Security Team in person (**Main Campus, Office of the Registrar, JPL 1.01.14**), by Campus Mail (**Banner Security, Office of the Registrar**), or by email as a PDF document (**BannerSupport@UTSA.edu**).
Q: Can walk over my request?
A: Yes. Completed forms can be submitted in person to receptionist in the Office of the Registrar, Main Campus, JPL 1.01.14. The person turning in the form may be asked to present their UTSACard for verification.

Step 6

Once received, the form will be reviewed by the Banner Security Team. Forms are typically processed within 2 business days of being received. Should there be any issues with the form, the appropriate people will be notified. Once Banner access is completed, the form will be forwarded to the proper departments for any additional requested access.

Q: I submitted a form for my new staff a week ago. Why doesn’t he/she have an account yet?
A: You can call or email the Banner Security Team to check the status of a completed form. Account release can be delayed if authorization has not been received, the requested user has not completed the required FERPA training, the requested user has not been issued a staff email address, or the requested user is awaiting an active appointment. Completed forms are typically processed within 2 business days of being received.

Q: I have a question about the access I’ve been granted. Who should I contact?
A: You can contact the Banner Security Team if you have any questions regarding your access. However, depending on your question, we may need to forward you or consult another department. For example, OIT Support Services is better able to assist with issues involving printing from Banner.

Q: I have Banner, but I still can’t see what I want. Why?
A: You are only granted access as requested and authorized by the form. If you need additional access, contact the Banner Security Team for instructions. A new Account Request Form may be required for some modification requests.

Q: I can login to Banner now, but I still can’t access Xtender and/or AppWorx. Why?
A: Xtender and Appworx requests are reviewed and granted by another department. If you requested Xtender or AppWorx access on your Banner Account Request Form, the form was forwarded to the proper department once the Banner portion was completed. You will be notified separately once your Xtender or AppWorx access is ready.

Q: I’m only requesting Xtender/AppWorx/BOXI – not Banner. Do these directions still apply?
A: Parts 1-3 or the Account Request Form are still required to request access to one of the other systems listed. The Department and Data Custodian signatures will be determined by the department who gives access to the requested system.

Q: How do I contact the Banner Security Team?
A: To contact the Banner Security Team, email BannerSupport@UTSA.edu or call x6925 or x5068.
Q: I forgot my username and/or password. What do I do?
A: Email BannerSupport@UTSA.edu from your @UTSA.edu email account with your name and Banner ID #. You will be notified by email when your password has been reset.