Role Documentation for Student Financials

Please request no greater access than is needed to perform job responsibilities. The Office of the Bursar reserves the right to review and revise the access requested and/or assigned to any individual and also to modify all SF roles.

SF - Bursar Student Account View

- Permits access to view student account detail via *Campus Community > Student Services Center*. This view presents the bursar account exactly as it appears to students on the Self-Service pages.
- This role is available to many staff members across campus, including graduate field administrators and other staff who need visibility to student bursar account detail.
- **Before requesting this role, please check that other requested roles do not include equivalent access.**

SF - Bursar Customer Account View

- In addition to all the access provided by the **SF - Bursar Student Account View** role, this role permits access to view student account detail via the *Student Financials > View Customer Account* menu. It also provides the 'General Info' and 'Finances' tabs in the Student Services Center.
- This role is available to core administrators that require a complicated view of student account details. It is unsuited for graduate field administrators and staff in similar positions. Undergraduate Financial Aid administrators should be given **SF - FA UG Packaging Staff** instead.
- Before requesting this role, please check that other requested roles do not include equivalent access.

SF - Group Data Entry Staff

- In addition to all the access provided by the **SF - Bursar Student Account View** role, this role permits users inquiry access to the *Campus Community > Service Indicators (Student)* menu and transactional access to the *Student Financials > Charges and Payments > Group Processing* menu.
- This role is available to staff who need to post charges and credits to student accounts OTHER THAN tuition credits, insurance credits, stipends and other financial aid awards. **The role can not be authorized for anyone with Financial Aid awarding access** because of potential data integrity implications.

SF - FA Graduate Packaging

- This role is identical to the **SF - FA Grad/Prof Packaging Staff** and **SF - FA Professional Packaging** roles.
- In addition to all the access provided by the **SF - Bursar Student Account View** role, this role permits users inquiry access to item type setup data on the *Set Up SACR > Product Related > Student Financials > Item Types* menu.
- This role is recommended for all staff in the graduate departments who have access to post tuition/insurance credits, stipends and other financial aid awards.

SF - FA Professional Packaging

- This role is idential to the **SF - FA Grad/Prof Packaging Staff** and **SF - FA Graduate Packaging** roles.
- In addition to all the access provided by the **SF - Bursar Student Account View** role, this role permits users inquiry access to item type setup data on the *Set Up SACR > Product Related > Student Financials > Item Types* menu.
- This role is recommended for all staff in the professional schools who have access to post tuition/insurance credits, stipends and other financial aid awards.

SF - FA UG Packaging Staff

- This role is identical to the **SF - Bursar Customer Account View** role except that it also includes view access to **CU Account Summary View**.
- This role is available to staff members of the undergraduate Financial Aid office.

SF - FA Manager Staff

- In addition to all the access provided by the **SF - Bursar Customer Account View** role, this role permits users inquiry access to item type setup data on the *Set Up SACR > Product Related > Student Financials > Item Types* menu and view access to **CU Account Summary View**.
- This role is available to managers in the undergraduate Financial Aid office and also to service representatives in the Graduate School.

SF - Admissions Deposit Staff

- This role permits users inquiry access to the *Campus Community > Service Indicators (Student)* menu and transactional access to the *Student Financials > Charges and Payments > Group Processing* menu.
- This role is available to members of the undergraduate admissions office who need to post admission deposit charges to student accounts, however **it can not be authorized for anyone with Financial Aid awarding access** because of potential data integrity implications.

SF - Registrar Admin

- In addition to all the access provided by the **SF - Bursar Customer Account View** role, this role permits users inquiry access to the *Campus Community > Service Indicators (Student)* menu and also allows users to initiate tuition calculation for individual students using the 'Calculate Tuition' button on the 'Finances' tab in the Student Services Center.
- This role is available to core administrators within the Office of the University Registrar and the college registrar offices.

SF - CE Administrator View Only

- In addition to all the access provided by the **SF - Bursar Customer Account View** role, this role permits users inquiry access to the *Campus Community > Service Indicators (Student)* menu, inquiry access to item type setup data on the *Set Up SACR > Product Related > Student Financials > Item Types* menu, access to comments on the *Campus Community > Comments > Comments - Person* menu, view access to individual and batch tuition calculation activity and broad view-only access to Student Financials setup values.
- This role is available to a select group of administrators in the Continuing Education and the University Budget offices.

SF - CE Administrator with TCalc

- Identical to the "**SF - CE Administrator View Only**" role, except it also includes the ability to calculate tuition on individual students.
- This role is available only to a select group of core administrators in the Continuing Education office.

SF - Tuition Waiver Staff

- Permits access to add, update and view student equation variables via the *Student Financials > Tuition and Fees* menu.
- This role is available to a select group of administrators in the Continuing Education and Benefit Services departments.

SF - CIT Production Control

- Permits CIT Production Control staff to execute batch processes that support Bursar operations.
- This role is only available to CIT Production Control staff.

SXR-Stud-Fin-No-Tax-Reports

- Permits access to the Student Financials datamart reports, excluding any that might return sensitive tax-related data.

SXR-Stud-Fin-No-Tax-Models

- Permits model-level access to the Student Financials datamart tables, excluding tables that contain sensitive tax-related data.
- Knowledge of query building and an understanding of the SDM data structure is essential for model-level access to be useful.