PeopleSoft HCM Account Request Form

(Revised 12/02/2019)

Based on the type of security access needed, obtain all required signatures and save an electronic copy of this signed security form with the naming convention: **EmplID_HCMsecurity_MMYYDD**. This naming convention is required for records retention. Submit the file and copies of any related HCM course completion certificates through HSM with the PeopleSoft HCM Security Access service request.

SECTION 1 - User Information. Complete this form to create a new HCM User Account or to change/update an existing account because the User's department or job responsibilities have changed.

*Request Type: ○ New Account ○ Change Account	*Effective Date:
*User ID:	*Employee ID:
*Name:	
*Department ID (8-digits):	*Inter-Institutional Address/Mail Code:
*E-mail:	
*Work Phone:	*Fax:

I understand individuals using information assets and computer resources owned by UTHealth/UTP will be held accountable for such use and are expected to familiarize themselves and comply with published UTHealth and departmental security procedures and guidelines. Failure to comply with these policies, procedures, and guidelines may result in disciplinary action up to and including termination of employment or contract and may constitute a basis for legal proceedings. In compliance with the Handbook of Operating Procedures. I will not share or reveal my password under any circumstances. I understand that I am responsible for the specific use and protection of my password.

I understand the provisions described in thie Guidelines above, and I accept personal responsibiity for complying with them.

UTHealth Email Address	Employee Signature	Date

SECTION 2 - HCM Departmental Security: This security level controls which employees the User can access. Review the **HCM Departments** file to identify the required approval signature(s) for the selected department(s). Select **ONLY ONE** option (1-5) in Section2.

1. One HCM Dept ID (for access to all employees in the selected DeptID only):

2. Consecutive HCM Dept IDs (enter range of Dept. IDs or the first 4 digits for access to all employees in the selected Dept range) :

3. Multiple, non-consecutive HCM Dept IDs (enter Dept IDs here or attach a list for access to all employees in the specified DeptIDs) :

4. One Operating Unit (for access to all employees in the selected Operating Unit):

- ○ Oper Unit 1 - Administration and Finance
- ○ Oper Unit 2 - Medical School
- ○ Oper Unit 3 - School of Dentistry
- ○ Oper Unit 4 - Graduate School Biomedical Sciences
- ○ Oper Unit 5 - School of Biomedical Informatics
- ○ Oper Unit 6 - School of Public Health
- ○ Oper Unit 7 - School of Nursing
- ○ Oper Unit 9 - Harris County Psychiatric Center

5. All UTHealth - **For Processors & PeopleSoft Support only** (access to ALL EMPLOYEES in the entire university: ○ All UTHealth

The **HCM Department Owner/approver** must sign this request form to indicate approval for granting the requested access per HOOP 17.01, section 4. The owner of all-operating unit-inclusive department codes (Example: 30000000 includes all School of Dentistry codes) may be considered the owner of all organization codes included in that area for signature purposes.

UTHealth Email Address	HCM Departmental Security Approver Authorized Signature	Date

SECTION 3 - HCM Security Roles/Profiles: This security level controls what HCM pages the User can access. You may select more than one security role based on your job role/function. Refer to the **HCM Security Roles** file for a complete list of HCM Security Role descriptions and required signatures .

Role Name	Role Description	Required Training And/Or Signature
HCM End User Security Roles		
☐ inq_role	Inquire Access - general default access for PeopleSoft HCM; includes **Query Viewer** to run public queries	PeopleSoft HCM online training is available but not required. Only HCM Departmental Security is required.
☐ queryall	**Query Manage**r access to create/edit private queries	Requires Query Manager instructor-led training. Only HCM Departmental Security is required.

Role Name	Role Description	Required Training And/Or Signature
HCM Departmental Administrator Security Roles		
☐eff_adm	Administrator role for Effort Reporting	Requires **Effort Reporting** approval
If needed, select **ONLY ONE** fund security role for access to the UT 9/1 Funding pages in HCM:		
☐fundsdr_dean	Dean-level access to UT 9/1 Funding custom pages	Requires UT 9/1 Funding online training and **SDR** approval
☐fundsdr_dept_entry	Departmental-level access to UT 9/1 Funding custom pages	Requires UT 9/1 Funding online training and **SDR** approval
☐fundsdr_dept_view	Department inquiry only access to UT 9/1 Funding custom pages	Requires **SDR** approval
☐persnid	Access to National ID and SSN data	Requires **HR** approval
☐query_ssn	Query access to tables containing SSN	Requires **HR** approval
☐pybninq	Payroll inquire access	Requires **Payroll** approval
☐pybninq_hcpc	HCPC payroll inquire access	Requires **Payroll** and **HCPC** approval
If needed, select **ONLY ONE** utbd role for access to the UT Budgets pages in HCM:		
☐utbd_dpt	Departmental-level access to UT Budgets custom pages	Requires UT Budgets online training and **BFR** approval
☐utbd_inq	Inquiry-level access to UT Budgets custom pages	Requires **BFR** approval
☐utbd_opu	Oper. unit-level access to UT Budgets custom pages	Requires UT Budgets online training and **BFR** approval

Processor Role(s) - list all needed security roles here:	
NOTE: If the User needs either PASS submitter or PASS approver security access, please specify in the Other Comments section AND submit an email request directly to sdr@uth.tmc.edu to update your account.	
Other Comments:	

The **HCM Security Role Owner(s)** must sign this request form to indicate approval for granting access to the requested PeopleSoft pages, per HOOP 17.01, Section 4. Based on the HCM security role(s) selected, obtain the appropriate approval.

UTHealth Email Address	Security Role Owner Authorized Signature	Date

SUBMISSION: Complete this form to create a new user account or to change an existing user account because the User's department or job responsibilities have changed. Obtain all required signatures and save an electronic copy of the signed form with the naming convention: **EmplID_HCMsecurity_MMDDYY**. This naming convention is required for records retention. Submit the file and copies of any related HCM training course completion certificates through HSM with the [PeopleSoft HCM Security Access service request](#).

RETENTION: Do not send the original document to Records Management; they will store the HSM **electronic** version. However, it is strongly recommended that you retain the **original** form for a period of ninety (90) days from submission of your service request to confirm that the security request was processed correctly.