



## FINANCE INFORMATION SYSTEM (FIS) APPLICATION/ AUTHORIZATION

### with PAYROLL details

#### Section 1. Applicant / Finance User Profile Information

Name: (last name / first name)

Position Title:  Org Code:   
(see [www.mcgill.ca/apb/unit](http://www.mcgill.ca/apb/unit))

McGill ID:

Email Address:  Phone No:  Fax No:

Have you transferred Unit/Department? (check one box only)  Yes  No

Unit/Dept:  Address:

Building Name:

Room #:

I understand and agree that I will use my Banner userid and/or McGill ID for legitimate administrative use only, and will use it in compliance with the **Policy on Responsible Use of McGill Information Technology Resources**. (For details: <https://www.mcgill.ca/it/training-how/policies>). I understand that most if not all of the financial policies and regulations that may apply to my finance role are available on the [Financial Services](#) website. Once this form has been processed, I understand that I will be automatically subscribed to the FIS listserv. The FIS listserv is used to communicate monthly notifications when Financial Statements are ready for pick-up and other Finance related announcements.

Applicant's Signature/Approval: \_\_\_\_\_ Date: (DD/MMM/YEAR) P

#### Section 2. FIS Access Requirements - please check one:

**MINERVA & BANNER Access**  
 (Budget Query for Fund Holders, Financial Statements, IDC, Deposits, JE15) Pre-requisites: GEN 300, FIS 301/FIS 401, FIS 330/FIS 430

**MINERVA Web Access only**  
 (Budget Query for Fund Holders, Financial Statements) Pre-requisite: FIS 301/FIS 401

Training is **mandatory** for all **NEW** FIS users. This form should only be submitted once the access requirements have been met.

#### Section 3. Fund Query Access P

Do NOT fill out this section if you ONLY need access to process deposits, IDCs, JE15s. All FIS Users can process (post) transactions against any fund.

Fund Holders may use this section to **authorize** FIS users **query** access (i.e. **view** transaction details and balances) to their **funds**. Indicate the fund codes in the table below: *If additional space is needed attach a spreadsheet to the form.*

Note: The spreadsheet will need to be signed by the individual completing Section 4.

<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

OR

Unit/Department Head (Dean, Chair, Director) may **authorize** FIS users **query** access to **ALL** funds under the responsibility of the Unit/Dept.'s **Organization** code. Please indicate the Org code:

#### Section 4. AUTHORIZATION - Fund Financial Manager (Principal Investigator) or Unit Head (Org Manager/Delegate)

Name: (last name / first name)

Title:  Phone No:

Signing the form below indicates that you:

- **approve** access to the Finance Information System, as specified above.

- **authorize** viewing rights to payroll details (i.e. individual names and pay events) for the funds/org listed above.

**Important:** Once salary access has been granted, it applies to **all** funds to which the user has access (including those previously granted).

Signature/Approval: \_\_\_\_\_ Date: (DD/MMM/YEAR) P

#### RESERVED FOR FIS SECURITY:

Date Received: (DD/MMM/YEAR)	Date Processed: (DD/MMM/YEAR)	Banner Userid
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