



UNIVERSITY OF
South Carolina

PeopleSoft Finance Access Form

Complete this form and have it signed by your supervisor.

Email completed form to pssecure@mailbox.sc.edu.

Employee/Affiliate Contact Information

First and Last Name:	
Email:	
Network ID/ Login ID:	
USCID/ Employee ID:	
Department Name:	
Campus/Operating Unit:	
Location: Building/ Room #	

Request updates to the employee's PeopleSoft Finance access based on the person's job responsibilities.

Note: Roles that include checkboxes are assigned by the security team, while those without checkboxes are managed by other areas. Contact details and links to the relevant forms are provided.

Inquire Only and Operational Reporting Access

- ☐ **Finance Intranet Only:** Access to review and download operational reporting information on the Finance Intranet. Includes inquiry only access to PeopleSoft financial transactions. This access is automatically included with all access listed below.

Purchasing Responsibilities

- ☐ **Requisition/Payment Request Roles:** Complete purchase requisitions, payment requests & receiving.

PCard Liaison Role: Enter reports for other employees. An approved [Purchasing Department Liaison Request Form](#) signed by the department head is required. The Liaison role is assigned by Purchasing. If you have questions, please reach out to purchasing@sc.edu.

PCard Approval: To receive this role, the [Department Head/Chair Certification Acknowledgement Form](#) is required.

Depositor Responsibilities

- ☐ **Department Depositor Role:** Deposit money with the Bursar's Office.

Accounts Payable and Expense Report Responsibilities

Travel Proxy Role: Enter travel authorizations, expense reports, and reimbursements for other employees. **Training is required** before this role is assigned. Register for training on the [PeopleSoft Finance Training](#) section of the Office of the Controller website. The role is assigned once training is completed.

Team Card/Program Card Liaison Role: Email cards@mailbox.sc.edu for access.

General Accounting Responsibilities

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General Ledger Accountant Role: Complete journal entries.

Access will not be granted until **required training is completed and the pass email is attached to this request.** Register for on-demand training on the [PeopleSoft Finance Training](#) section of the Office of the Controller website. If you have questions, please reach out to genacctg@mailbox.sc.edu. This role also includes Journal Voucher eForm and Apex eForm access.

This person's Journal Entries will be approved by: _____

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Budget Accountant Role: Complete Budget entries.

This person's Budget Entries will be approved by: _____

Grants and Funds Management Responsibilities

Sponsored Award PI Changes (USCSP): All PI updates must be submitted to the SAM Office for contract compliance evaluation.

Sponsored Award Level 1 Approver Changes (USCSP): Please contact the Post Award Accountant (PAA) for the award.

Other Project Approvers

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USCIP and USCSA Project Level 1 Approval: this applies to any chartfield combinations that include USCIP or USCSA Projects for Level 1 approval of Requisitions, Payment Requests, Expenses, and Journal Vouchers.

List 8-digit PeopleSoft Project #(s) for which this person has Level 1 approval authority. Separate by commas (attach additional information, if necessary)

Financial Transaction Approval Access

Department Transaction Approval: Choose the transactions below that this person is authorized to approve.

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Requisition/Payment
Request Approver

☐

Expense Approver
(travel and non-
travel)

☐

Journal Voucher
Approver

Level 1 Approval Departments (this does not apply to any chartfield combinations that include Projects)

List 6-digit PeopleSoft Department #(s) for which this person has Level 1 approval authority. Separate by commas (attach additional information, if necessary).

Level 2 Approval Departments (this applies to all chartfield combinations – including Projects)

List 6-digit PeopleSoft Department #(s) for which this person has Level 2 approval authority. Separate by commas (attach additional information, if necessary).

Remove Roles:

When a person completely separates from the University of South Carolina and has no remaining jobs, their PeopleSoft Finance access is automatically removed on the date of their separation.

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This person has a change in responsibilities within their current office and requires a change in roles.

Roles to be removed: _____

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This person has left their current USC office but remains employed in a different USC office.

New office (department): _____

Other:

Please explain (Examples: Run nVision reports for an Operating Unit; Physical Inventory; Department Cashier, and/or request to copy access of another user).

Univ. of South Carolina – Statement of User Responsibility (Policy ACAF 7.02)

I understand that by virtue of my employment with the University of South Carolina, I may have access to data, information, systems, or files in various forms which contain individually identifiable information, the disclosure of which may be prohibited by federal or state law or by university policy. I acknowledge that the intentional disclosure by me of this information to any person could subject me to criminal and civil penalties imposed by law. I further acknowledge that such willful or unauthorized disclosure may also violate University of South Carolina policy and could constitute just cause for disciplinary action including termination of my employment on the first offense regardless of whether criminal or civil penalties are imposed.

If I am in doubt about a request, I will consult with my supervisor prior to releasing the information. My signature denotes that I have read and understand the above statement.

Employee/Affiliate Name and Signature

Date

Supervisor Name and Signature

Date

College or Operating Unit Level Finance Approval Name and Signature (Add if applicable)

Date

College or Operating Unit Level Grant Head Approval Name and Signature (Add if applicable)

Date

Campus Level Finance Director or Controller Name and Signature (Add if applicable)

Date

This form and any updates to the form can be found on the University of South Carolina website
www.sc.edu

Navigation: Office of the Controller > Resource and Training Toolbox