

First Name: _____ Middle Initial: ____ Last Name: _____
Department: _____ Telephone: _____
Job Title: _____
E-mail address: _____
Supervisor's Name: _____

FORM INSTRUCTIONS

*Please complete section A. Complete section B and/or C if directed to, read and sign the OSU Foundation's Security & Confidentiality Policy in Section D (page 2). Retain a copy for your records.
Return To: Information Technology, OSU Foundation, 850 SW 35th Street, Corvallis, Oregon 97333*

SECTION A: WHICH SYSTEM DO YOU NEED ACCESS TO?

- Fund Holders Report(s) - Requires ONID account, complete section B and D
- File Transfer - Requires ONID account and Advance entity ID, complete sections B and C and D

SECTION B: ONID ACCOUNT

You must have an active OSU ONID account to utilize Fund Holders and File Transfer systems.

Information about obtaining an ONID account can be found at: <http://www.onid.orst.edu/>

ONID User Name: _____

OSUF uses your ONID user name to identify which OSUF data resources you are authorized to view.

All communications regarding the status of the OSUF Web Reporting System and report availability will be e-mailed to your ONID e-mail account. Please be sure that you either read mail sent to this account, or that you have taken the necessary steps to have your ONID e-mail forwarded to an e-mail account that you regularly read. Information on forwarding your ONID e-mail can be found at: <http://www.onid.orst.edu/docs/emailfaq.shtml#q5>

SECTION C: ADDITIONAL INFORMATION NECESSARY TO CREATE OR VERIFY ADVANCE ID

Home Address: _____

OSUF Use Only

OSUF Distribution ID: _____

Advance ID: _____

Reports Needed: _____

Account Request approved by: _____

SECTION D:

OREGON STATE UNIVERSITY FOUNDATION DATA SECURITY AND CONFIDENTIALITY POLICY

All individuals seeking access to the OSU Foundation's information systems must first read and sign the following Data Security and Confidentiality Policy. The purpose of this policy is to ensure the integrity of records maintained by the OSUF and to establish reasonable precautions for safeguarding information about the University's alumni, donors, and other friends. Individuals who are granted access must adhere to the regulations stated below and should report policy violations immediately to their supervisors or to the OSUF Director of Development Services. Failure to operate within the dictates of this policy may result in sanctions including, but not limited to, the withdrawal of access privileges. Additional sanctions may arise under local, state, or federal laws and applicable University or Foundation policies.

The Oregon State University Foundation (OSUF) maintains biographical and financial information about University alumni and friends and their gifts to the institution. These records, whether in electronic or printed format, are to be kept confidential and may be accessed only by OSU, OSUF, or OSU Alumni Association (OSUAA) staff members who require the information to further the mission of the University and whose assigned employment duties necessitate knowledge of this information.

Biographical/Contact Information: Publicly available information, or "directory" information as it is often called, such as name, address, and telephone number will be made available to OSU, OSUF, or OSUAA employees who need it to perform their assigned duties. In most cases these employees will be granted direct access to the biographical information via Advance, the OSUF's alumni and donor database.

Additionally, employees of the OSU Foundation may release biographical, directory-type information in the form of lists, labels, data files, and reports to OSUF staff and to representatives of officially recognized University groups who require the information. However, Foundation employees and others with access to the OSUF's information systems must not knowingly release information of any kind to be used for non-University purposes.

When someone who is not an OSUF, OSU, or OSUAA employee seeks the address, phone number, or email for an alumnus/a or other individual on the OSUF's database, the Foundation's policy is to forward, as time and circumstances allow, the inquiry to the person about whom the information is requested, thereby allowing that person to decide whether to contact the requester.

Gift Data & Other Sensitive Information: The financial information (gift and pledge data) associated with these records is more sensitive in nature and access to it must be more closely guarded. Gifts processed through the OSUF presume an understanding between the donor and the OSUF that the details of the transaction will be held in confidence and will not be made part of the public record. Direct access to gift data and related financial information, as maintained in the OSUF's databases (i.e., Advance and PeopleSoft), will be granted only to OSUF staff. Information pertaining to fundraising activities, such as that contained in the Prospect Tracking and Management System of Advance, is likewise sensitive in nature and therefore, as with gift data, direct access to this portion of the database is limited to OSUF staff only.

OSUF staff may make relevant gift and prospect tracking information available to OSU and OSUAA employees via hard-copy reports and data files when it is required to carry out specific development activities. Foundation staff, for example, may provide reports to University departments regarding gifts to their programs for the purpose of generating thank you notes for those gifts.

Data Security: An individual with access to the OSUF's information systems must take precautions to ensure that documents are secure while in his/her possession and that they are properly disposed of (i.e. shredded). Further, a person with access to the OSUF's databases, hard-copy files, or other information systems may not:

- Share information about alumni, donors, prospective donors, or other University constituents with unauthorized individuals.
- Knowingly allow any unauthorized use the OSUF's information systems.
- Reveal the contents of any record or report to anyone except in the conduct of his or her work assignments on behalf of OSU, the OSUF, or the OSUAA.
- Knowingly include a false, inaccurate, or misleading entry in any report or record.
- Knowingly erase or modify data from any record, report or file, except in the performance of assigned duties.
- Remove any official record, report, file or copy of an official record or report from the office where it is maintained except in the performance of official duties.

I have read, understand, and agree to abide by the policy outlined above. I understand that failure to do so will result in the loss of access privileges and may subject me to disciplinary measures.

Signature

Date