

## Request for Access to Student Academic and Financial Records

### Personnel needing access to student records:

Name \_\_\_\_\_ OUNetID (4x4) \_\_\_\_\_ Sooner ID \_\_\_\_\_ Date \_\_\_\_\_

Email \_\_\_\_\_ Title \_\_\_\_\_ Department \_\_\_\_\_

Office phone \_\_\_\_\_ Role(s)? Faculty instructor  Academic advisor  Departmental staff  Student worker

Requesting same level of access as previous employee?

YES  NO

If YES, previous employee name: \_\_\_\_\_

Previous employee OUNetID (4x4): \_\_\_\_\_

Requesting same level of access as existing employee?

YES  NO

If YES, existing employee name: \_\_\_\_\_

Existing employee OUNetID (4x4): \_\_\_\_\_

*If this is not a request for the same access as a previous or existing employee, indicate below what access is requested.*

### Job functions requiring access to student **ACADEMIC** records (check all that apply):

view student status, registrations, contact information<sup>1</sup>

(View Student Info, The Book)

view class rosters (Faculty Schedule<sup>2</sup>, The Book)

clear advisement indicators<sup>3</sup> (Advising Flags)

Degree Navigator/Stellic

enroll and add/drop students

submit grades (Faculty Grade Assignment)

view student academic transcripts<sup>1</sup> (Advisor Tools)

issue course overrides<sup>3</sup> (The Book)

Dept \_\_\_\_\_ Course \_\_\_\_\_ Sec \_\_\_\_\_

### Job functions requiring access to student **FINANCIAL** records (check all that apply):

#### Bursar

view student bursar account charges to administer scholarships/aid, account balances

enter student bursar account charges

#### Financial Aid

view student scholarship/financial aid information to administer scholarship/aid programs

### Internal INB access – limited to administrative offices

Recruitment class(es) needed to perform job functions:

\_\_\_\_\_

Admissions class(es) needed to perform job functions:

\_\_\_\_\_

Registration class(es) needed to perform job functions:

\_\_\_\_\_

Authority to create person records (SPAIDEN-M) needed to perform these job functions.

Academic Records class(es) needed to perform job functions:

\_\_\_\_\_

Bursar class(es) needed to perform job functions:

\_\_\_\_\_

Financial Aid class(es) needed to perform job functions:

\_\_\_\_\_

**I certify that I took the mandatory FERPA training and read the attached FERPA information prior to submitting this request. I certify that I will follow the University FERPA policies and will limit my use of student data created, obtained, and/or maintained by the University the types and uses indicated in those FERPA policies. I understand that if I use or disclose FERPA protected information in violation of the University's FERPA policies or federal privacy laws, I will be subject to sanctions, which may include, but are not limited to, termination.**

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

I verify the requestor has a legitimate educational interest in accessing OU student information.

\_\_\_\_\_  
Department Chair/Director Name

\_\_\_\_\_  
Department Chair/Director Signature

\_\_\_\_\_  
Date

**Norman main campus, PACS, and OU-Tulsa** – Email completed form to [systemsaccess@ou.edu](mailto:systemsaccess@ou.edu).

<sup>1</sup> For departmental staff to be used to support instructors/advisors, and/or determine eligibility for programs/scholarships

<sup>2</sup> Faculty only

<sup>3</sup> For departmental staff to be used as delegated by instructors and advisors



## Access to Student Records and Release of Student Information

**Information about students and former students gathered by the University of Oklahoma is of two types: directory and confidential.**

Any office gathering such information and/or having custody of it shall release it only in accordance with the Family Educational Rights and Privacy Act (FERPA). FERPA is the federal law that governs the rights of students and university responsibility with respect to student records.

When a student enters a university and furnishes data required for academic and personal records, there is an implicit and justifiable assumption of trust placed in the University as custodian of such information. This relationship continues with regard to any data subsequently generated during the student's enrollment. A student's education record includes any records maintained by the University that are directly related to that student, including but not limited to, handwriting, print, computer media, video or audio tape, film, microfilm, and microfiche.

While the University fully acknowledges the student's rights of privacy concerning this information, it also recognizes that certain information is part of the public record and may be released for legitimate purposes.

### Directory Information

This is information, which routinely appears in student directories and alumni publications and may be freely released. The University of Oklahoma has designated specific information as Directory Information:

- Name
- local and permanent addresses
- email address
- telephone number
- college
- major
- classification
- current enrollment status
- participation in recognized student activities & sports
- dates of attendance
- degrees and awards received and dates of receipt
- posting of individual student's grades and interim class evaluations by code number which does not identify the student
- anticipated date of graduation based on completed hours.

The University of Oklahoma may disclose any of the above listed items, without the student's prior written consent, unless the student elects to withhold directory information by notifying the Office of Academic Records in writing.

### Withholding Directory Information

A student may elect to withhold directory information by filling out the [Directory Information Hold Form \(PDF\)](#) and submitting it to the Office of Academic Records, 1000 Asp Avenue, Buchanan Hall room 230. **For students who withhold directory information, University officials are prohibited from releasing any information without a written release from the student.**

### Confidential Information

Any information that is not included in the definition of the institution's directory information is confidential and may not be disclosed without the student's signed and dated release, except as otherwise provided by law:

- school officials within the institution who have a legitimate educational interest - A school official is a person employed by the University in an administrative, supervisory, academic or research, or support staff position (including law enforcement personnel and health staff), a person serving on the Board of Regents, a person or company under contract to the University to perform a service or function instead of using University employees or officials, a student serving on an official committee such as a disciplinary or grievance committee or who is assisting another school official in performing his/her tasks;
- officials of schools to which the student seeks to transfer;
- the Comptroller General of the United States, the HEW Secretary, the administrative head of an educational agency, or State educational authorities;
- in connection with the student's application for, or receipt of, financial aid if the information is necessary to determine eligibility, amount of or conditions for the aid or to enforce the terms and conditions of the aid;
- State and local officials or authorities to which such information is specifically required to be reported under the State statute and adopted prior to November 19, 1974;
- organizations or educational agencies conducting legitimate research, provided no personal identifiable information about the student is made public;
- accrediting organizations;
- parents of a dependent student upon proof of dependency (exclusive of international students);
- in connection with an emergency when such information is necessary to protect the health or safety of the student or other persons, and
- to comply with a judicial order or lawfully issued subpoena provided that the educational institution makes a reasonable effort to notify the student of such prior to compliance, unless the existence or contents of the subpoena or order may not be disclosed by law.

Personal information shall only be transferred to a third party, however, on the condition that such party will not permit any other party to have access to the information without the written consent of the student.

**University employees may not disclose personally identifiable information to anyone other than the student about whom the information pertains.** Personally identifiable information is information that directly identifies a student or would make the student's identity easily traceable, including but not limited to: the student's name, the name of the student's parent or other family members, the address of the student or the student's family, personal identifiers such as the student's social security number or biometric record, other indirect identifiers such as the student's date of birth or mother's maiden name, or other information that, alone or in combination, is linked or linkable to a specific student that would allow a reasonable person in the school community, who does not have personal knowledge of the relevant circumstances, to identify the student with reasonable certainty, or information requested by a person who the educational agency or institution reasonably believes knows the identity of the student to whom the education record relates.

You should always check and double check your recipient list before sending non-directory, student education information via email. You must ensure that you are not disclosing non-directory, student education information to anyone other than the student about whom the information pertains.

**Remember,** just because you have **access** to student data does not mean you have the **authority** to release the information without the student's consent.