Instructions for using DocRoute Banner HR/Payroll Security Form:

Navigate to the Faculty and Staff Logins page of the USA Website and expand Faculty/Staff Applications A-Z at the left. Click on Document Routing (DocRoute):

At the prompt, enter your Jag Number and SSO password:
Enter a Jag Number or an email address, then click on Search. This form will allow you to request Banner Security for yourself, or on behalf of another employee. The fields in gray will prefill.

Enter the Department Head/Approving Supervisor’s Jag Number or email address. The gray areas will prefill.
Requesting NEW ACCESS

If the user is requesting new access, the only option available in the “Requested Action” drop-down is “Create a new account and assign security items.” Add a phone number where you can be reached in the next field. Choose “HR/Payroll” from the drop-down for “Security Type.”

Next, click on “Add ORGN Access” button to indicate which Organizations you need access to:

Repeat this process for each Organization’s access you are requesting.

Next, choose the “Security Source.” You can either request us to copy from an existing employee or describe what type of access you need in the box provided:
Once you are done, read the attestation at the bottom and click on “Submit.” Your request will process through the appropriate approval queues and you will be notified once your Banner Finance access has been set up.

**CHANGING YOUR EXISTING BANNER HR/PAYROLL ACCESS:**
Here is an example of someone who already has Banner Finance access, but has transferred to another department and needs access to different Organizations, Funds and reports. You can also choose the option to copy an existing user’s access under “Security Source” (not pictured, see instructions in new Banner users section)
Managers can also use this form to request Banner access to be removed for terminated employees:

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Details
Requested Action *
Remove all security items and lock the account □
Additional Notes / Comments
Jane Doe’s last day was 12/7/23. Please remove Banner Access.

By submitting or approving this request I understand that, I may be given access to one or more administrative computer systems. The information contained in these systems is private and confidential in nature and I acknowledge it is my responsibility to maintain the privacy of these records.

I have read the University’s Information Systems Security Policy and understand all the requirements and guidelines stated therein. I understand that I am responsible for passwords which I have been given and that I will be held accountable for any invalid use of my user identification. I further acknowledge that my failure to follow these rules will subject me to disciplinary action up to and including dismissal and possible legal action.
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If you have any questions or need assistance completing the form, please call the Business Office at 251-460-6241 and we will be glad to help.