

Instructions:

School Districts: CBOs submit completed form to SCOE. Charter Schools: Submit to Sponsoring District.



5340 Skylane Boulevard
Santa Rosa, CA 95403-8246
(707) 524-2600 | scoe.org

SACS Software User Security/Role Assignment Request

Name: _____ Email: _____

LEA: _____

Assign the following roles (descriptions on next page) check all that apply:

Edit Draft Dataset

Edit Dataset

Dataset Approval

Oversight

Certify/Promote to CDE

User Management

Administration

Requested by: _____ Date: _____

Approved by: _____ Date: _____

User Roles

| | | |
|---|------------------------|---|
| 1 | Edit Draft Dataset | Basic dataset editing abilities in draft area |
| 2 | Edit Dataset | Basic dataset editing abilities in draft; can request to promote dataset draft to submission dataset |
| 3 | Dataset Approval | Ability to promote a submission to reviewing agency |
| 4 | Oversight | Review or edit a submission for which the entity has oversight responsibilities; validates the fiscal solvency status |
| 5 | Certify/Promote to CDE | Staff allowed to submit (UA) data and certify it; Formerly eTransfer access users; can only be assigned by CDE |
| 6 | User Management | Manages user accounts at the associated entities |
| 7 | Administration | Superuser for associated entities |

Examples of User Role Assignments:

School District/Charter School CBO: 1, 2, 3, 6 and 7

Director of Finance: 1, 2, and 3

Accountant: 1 and 2