



## The Ohio State University Foundation Advancement System Fund View Permission Request Form

Name: \_\_\_\_\_ Name.#: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Department: \_\_\_\_\_ Department #: \_\_\_\_\_

Supervisor Name: \_\_\_\_\_

Supervisor Email: \_\_\_\_\_ Supervisor Phone: \_\_\_\_\_

The Advancement System (TAS) Fund View is a web-based application that aggregates information from the University's Office of Financial Services, Office of Student Financial Aid (SIS), General Ledger, and Foundation databases. The Family Educational Rights and Privacy Act of 1974 and amendments (federal), Gramm-Leach-Bliley Act (GLBA), and Ohio Revised Code Section 102 address the confidentiality and security of information displayed in Fund View. Users should be familiar with these laws.

As an employee of an office that has access to records in computer information systems or any other source, you are required to maintain this information in a confidential manner. The unauthorized access to, modification, deletion or disclosure of information in any such system may compromise the integrity of the system or otherwise violate individual rights of privacy and/or constitute a criminal act.

Distribution and/or reproduction of any record or information outside the intended and approved use is strictly prohibited. Illegal access or misuse of this information is punishable by fine and/or imprisonment. Further, University computer systems are for the use of authorized users only.

I \_\_\_\_\_, hereby affirm that I have read and will comply with the standards and requirements put forth in this document and the University's institutional data policy. I have read and initialed, where indicated, on page two of this document and have retained in my possession a copy of the document for future reference.

\_\_\_\_\_  
Print Employee Name

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Date

**FOR OFFICE USE ONLY**

Date Training Completed:

Alumni ID:

Date Submitted & Account Created:

Administrator:

Send completed form to:  
**Donor Relations & Stewardship**  
**The Ohio State University Foundation**  
**1480 West Lane Avenue**  
**Columbus, OH 43221**



## The Ohio State University Foundation Advancement System Fund View Permission Request Form

### Family Educational Rights and Privacy Act (FERPA)

The Family Educational Rights and Privacy Act [FERPA (20 U.S.C. 1232g; 34 CFR Part 99)] is a Federal law that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department Education.

Generally, schools must have written permission from the parent or eligible student in order to release any information from a student's education record. However, FERPA allows schools to disclose those records, without consent, to certain parties or under certain conditions. These include, but are not limited to (34 CFR 99.31):

- School officials with legitimate educational interest;
- Other schools to which a student is transferring;
- Specified officials for audit or evaluation purposes;
- Appropriate parties in connection with financial aid to a student;
- Organizations conducting certain studies for or on behalf of the school;
- Accrediting organizations;
- To comply with a judicial order or lawfully-issued subpoena;
- Appropriate individuals in cases of health and safety emergencies; and
- State and local authorities, within a juvenile justice system, pursuant to specific State law.

Schools may disclose, without consent, "directory" information such as a student's name, address, telephone number, date and place of birth, honors and awards and dates of attendance. However, schools must tell parents and eligible students about directory information and allow parents and eligible students a reasonable amount of time to request that the school not disclose directory information about them. Schools must notify parents and eligible students annually of their rights under FERPA. The actual means of notification (special letter, inclusion in a bulletin, student handbook, or newspaper article) is left to the discretion of each school.

I have read and understand my obligations in complying with the Family Education Rights and Privacy Act of 1974, as Amended.

Initialed: \_\_\_\_\_ Date: \_\_\_\_\_

### Gramm-Leach-Bliley Act (GLBA)

The Financial Modernization Act of 1999, also known as the "Gramm-Leach-Bliley Act" or GLB Act, includes provisions to protect consumers' personal financial information held by financial institutions. There are three principal parts to the privacy requirements:

- Financial Privacy Rule – governs the collection and disclosure of customers' personal financial information by financial institutions.
- Safeguards Rule – requires all financial institutions to design, implement, and maintain safeguards to protect customer information.
- Pretexting provisions – protect consumers from individuals and companies that obtain their personal financial information under false pretenses.

I have received training on the Gramm-Leach-Bliley Act and understand my responsibilities.

Initialed: \_\_\_\_\_ Date: \_\_\_\_\_

### Ohio Revised Code, Section 102.03(B)

"No present or former public official or employee shall disclose or use, without appropriate authorization, any information acquired by him in the course of his official duties which is confidential because of statutory provisions, or which has been clearly designated to him as confidential when such confidential designation is warranted because of the status of the proceedings or the circumstances under which the information was received and preserving its confidentiality is necessary to the proper conduct of government business."

I have read and understand my obligations in complying with Ohio Revised code, Section 102.03(B).

Initialed: \_\_\_\_\_ Date: \_\_\_\_\_

Send completed form to:  
**Donor Relations & Stewardship**  
**The Ohio State University Foundation**  
**1480 West Lane Avenue**  
**Columbus, OH 43221**