

**OREGON STATE
UNIVERSITY FOUNDATION**

**Advance Account Request
(For non-OSUF employees)**

___PS ___JR
___LU 2/23/10

Name: _____ o Staff o Student o Other _____
Last First MI

Department: _____ Telephone: _____

Job Title: _____

Supervisor Name: _____

Primary Location: OSU Campus OSU Cascades Campus Other _____

FORM INSTRUCTIONS

Please Complete UN-SHADED Areas in sections A. Read and sign the OSU Foundation's Security & Confidentiality Policy in Section B.

Return To: Information Technology, OSU Foundation, 850 SW 35th Street, Corvallis, Oregon 97333

SECTION A: ACCESS TO ADVANCE (DEVELOPMENT SYSTEM)

Have you had previous access to Advance? Yes No If Yes, Username: _____

Access Requested:

Biographical Inquiry

Users who have been approved to access the Advance database must complete an appropriate formal training program, commensurate with their level of access, prior to receiving their Login ID to Advance.

OSU Dean, Department Head/Chair

or other Supervisor's Signature: _____ **Date:** _____

OSU Foundation Director Data Management Group Signature: _____ **Date:** _____

Advance ID: _____ Date DMG Notified: _____ Username: _____

SECTION B:

OSU FOUNDATION CONFIDENTIALITY AGREEMENT

All individuals seeking access to biographical and financial data maintained by the Oregon State University Foundation (OSUF) must first read and sign the following Confidentiality Agreement. The purpose of this agreement 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. Those who are granted access must adhere to the regulations stated below and should report violations immediately to their supervisors and to the OSUF Chief Financial Officer. Failure to operate within the dictates of this agreement 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.

OSUF maintains the university's central databases containing 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 for the

purposes of furthering the University's relationships with its alumni, donors, and other constituents. (Limited information may also be made available to volunteers and consultants working with the University, Foundation, or Alumni Association on external relations matters.)

Biographical/Contact Information: Publicly available information, or "directory" information as it is often called, such as name, address, and phone number will be made available to OSU, OSUF, or OSUAA employees who need it to perform their assigned University advancement duties. If an employee's job duties justify a need for access, the Director of OSUF Data Management will review the access request for reasonableness and approve the necessary access to biographical information via Advance, the OSUF's alumni and donor database application.

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, will be granted only to OSUF and OSUAA staff. Information pertaining to fundraising activities, such as that contained in the Prospect Management and Tracking 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 and critical staff as needed.

OSUF staff will provide gift data to University departments regarding gifts to their programs for the purpose of generating thank you notes for those gifts.

The OSUF's databases contain other highly confidential, non-directory-type information. Examples of confidential information includes, but is not limited to:

- Year of birth
- Gender
- Ethnicity
- Social Security Number

Information provided by the University has been made available to the Foundation with the understanding that only OSUF employees will have access to it and only for development purposes. Foundation employees must not release this type of information to any non-Foundation employees without the approval of the OSUF Chief Financial Officer.

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.

Additionally, OSUF employees may release biographical, directory-type information in the form of lists, data files, and reports to OSUF staff and to representatives of officially recognized University groups who require the information for fundraising or broader University advancement purposes. (Special approval from the OSUF Chief Financial Officer is required for any request involving the use of alumni or donor information for non-advancement or non-University purposes.) Examples of how this data may not be used includes (but is not limited to):

- Sales i.e. selling insurance, products, real-estate
- Political i.e. lobbying, ballot measure support

Data Security: An individual with access to data from the OSUF's information systems must take precautions to ensure that documents and electronic files are secure while in his/her possession and that they are properly disposed of (i.e. shredded or permanently deleted). Further, a person with access to the OSUF's databases, hard-copy files, or other information systems will **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.
- Reveal to others his/her username and password for any OSUF data system. (Shared log-ins are not permitted.)
- 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.
- Retain data for uses other than what was originally specified or transfer data to be stored in any system not approved by OSUF.
- Store unencrypted information on any removable media ex: USB device, Ipad, Blackberry, laptop, CD, PC, etc.
- Transmit information in an unsecured manner, such as an email attachment or over an open network.

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

Printed Name: _____

Signature: _____ **Date:** _____

Inquiries on this agreement should be directed to the Chief Financial Officer @ 541-737-4218