Department of Financial Services | Division of Accounting and Auditing

Workiva User Account Request Form

Last Name	First Name	Middle Initial	Email Address	Phone Number	Agency OLO	Action	Workiva User Role	File Folder Access
						Add Role	Editor	ACFR
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Workiva User Roles:

Editor – Can complete surveys and forms as well as view, edit, and comment on all files/ documents in Workiva.
Viewer – Can view and comment on all files/documents in Workiva.
Agency Access Control Custodian - Must be independent from the user requesting access.

File Folder Access Types:

GASB 87 & 96 Lite – Used to complete surveys and obtain output data related to leases and SBITA.
ACFR – Used to complete form packages and submit required documents used in the ACFR preparation.
SEFA – Used to complete form packages and submit required documents used in the SEFA preparation.
PENSION & OPEB (DMS only) -- Used to complete Pension & OPEB allocation process.

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Access Control Custodian Name: _____
Access Control Custodian Approver Title: _____
Access Control Custodian Signature:_____
Date:_____