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	Training Completion Date
						Add	Workspace Member	GASB 87 Lite	
						Add	Workspace Member	GASB 87 Lite	
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Workiva User Roles:

Workspace Member – Can view workspace details and memberships.

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.

Limited Starter – Can view and comment on certain files/documents in Workiva.

Authorizing Agency Access Control Custodian - Must be independent from the user requesting access.

File Folder Access Types:

GASB 87 Lite – Used to complete surveys and obtain output data related to leases.

GASB 96 Lite – Used to complete surveys and obtain output data related to SBITAs.

ACFR – Used to complete form packages and submit required documents used in preparation for the ACFR.

Access Control Custodian Name: ______________________________________

Access Control Custodian Approver Title:__________________________________

Access Control Custodian Signature:__________________________________

Date: ____________________