CaneLink Security Role Access
Request Form Submission Guide

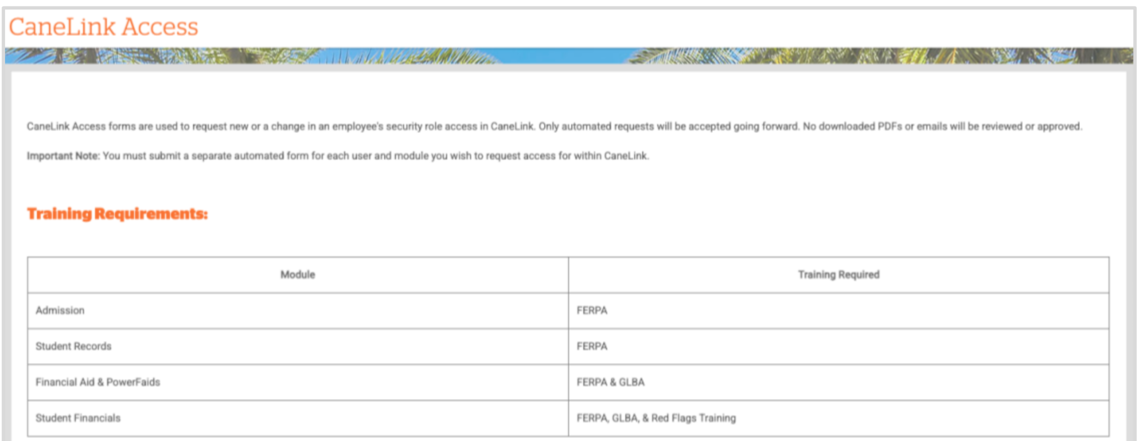
Use this guide to complete a security role access request in CaneLink using the **automated submission process**.

Important Notes:

- **Only automated requests will be accepted**. No downloaded PDFs or email submissions will be reviewed or approved.
- A **separate form must be submitted for each user and module**.
- **Supervisor approval is required** for all submissions.

STEP 1

- Visit canelink.it.miami.edu/access-form to start your access request form submission.



CaneLink Access

CaneLink Access forms are used to request new or a change in an employee's security role access in CaneLink. Only automated requests will be accepted going forward. No downloaded PDFs or emails will be reviewed or approved.

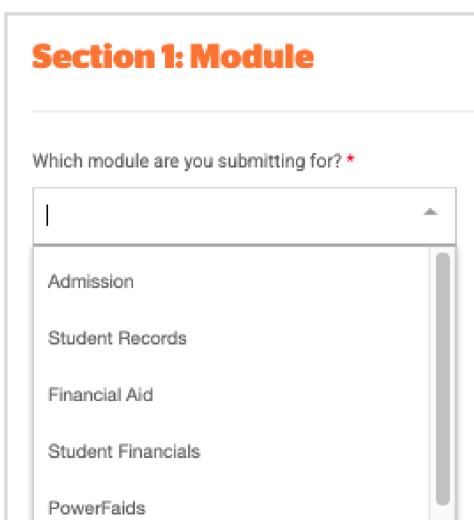
Important Note: You must submit a separate automated form for each user and module you wish to request access for within CaneLink.

Training Requirements:

Module	Training Required
Admission	FERPA
Student Records	FERPA
Financial Aid & PowerFaids	FERPA & GLBA
Student Financials	FERPA, GLBA, & Red Flags Training

STEP 2

- Under **Section 1: Module**, select the category for which you are requesting access.
  - Modules include: Admissions, Financial Aid, PowerFAIDS, Student Financials, and Student Records (Academic Advisement and Campus Community).



Section 1: Module

Which module are you submitting for? *

Admission

Student Records

Financial Aid

Student Financials

PowerFaids

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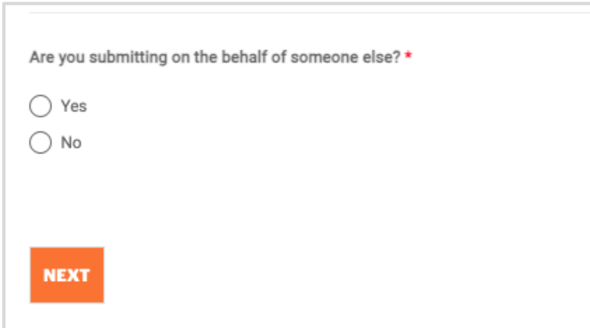
STEP 3

- Indicate whether you are submitting the request for yourself or on behalf of another user. (This option only appears for certain modules.)
  - If you select **Yes**, enter the other person's name or EMPLID, CaneID, or C Number.


Are you submitting on the behalf of someone else? *

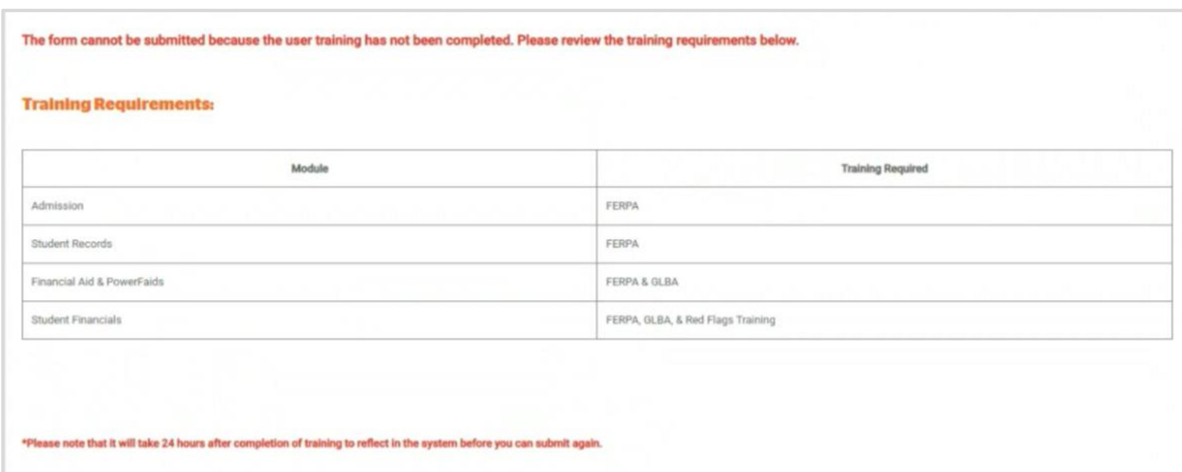
Yes

No

NEXT

STEP 4

- The system will check whether required training has been completed for the selected module.
- If training has not been completed:
  - For **Student Financials**, you will need to **email** sarequests@miami.edu as prompted.
  - For all other modules, prerequisite training must be completed before the request can proceed.
  - **It will take 24 hours after completing the required training before you can submit again.**


The form cannot be submitted because the user training has not been completed. Please review the training requirements below.

Training Requirements:

Module	Training Required
Admission	FERPA
Student Records	FERPA
Financial Aid & PowerFaids	FERPA & GLBA
Student Financials	FERPA, GLBA, & Red Flags Training

*Please note that it will take 24 hours after completion of training to reflect in the system before you can submit again.

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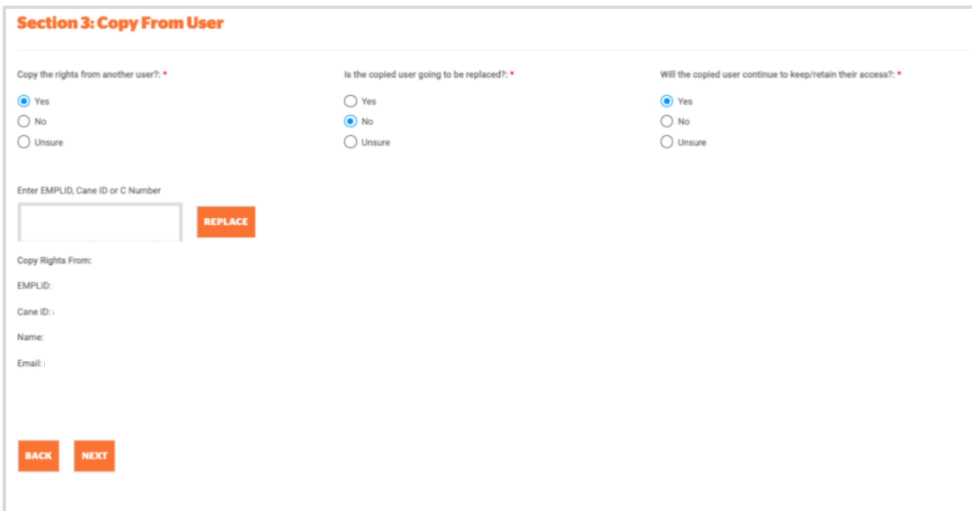
STEP 5

- After training is verified, complete **Section 2: Request Info** by entering all required details specific to the module you selected.

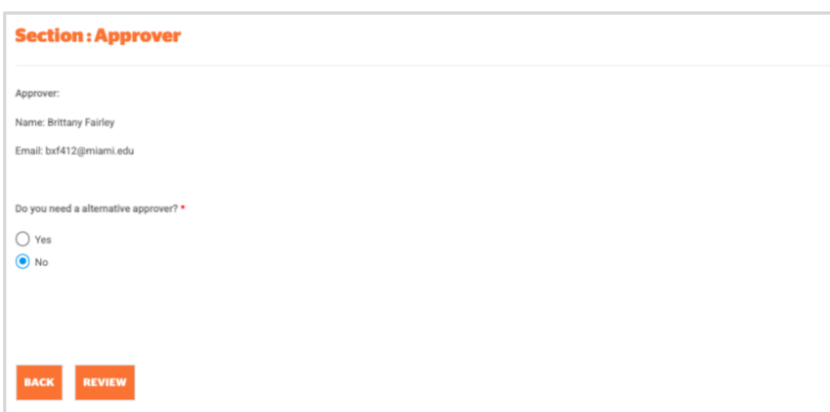
STEP 6

- If desired, **you can copy access roles from an existing user** in Section 3 by entering their name or EMPLID, CaneID, or C Number. (This option only appears for certain modules.)



STEP 7

- The system will automatically pull the requestor's immediate supervisor from Workday as the default approver.



- Review this assignment and indicate whether you would like to designate an alternate approver.
    - If you select an alternate, the system will automatically assign the next-level manager as the approver. *Be sure to confirm the approver before proceeding.*

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STEP 8

- A snapshot of your form with the details you provided will be shown.
  - After reviewing your form, click **Submit**.

- A confirmation screen with a ‘Thank You!’ message will appear. No further action is required. You may now close your browser or return to the dashboard.