Budget Office Data Policy Statement

Constituents

The Budget Office interacts with a broad range of constituents both internal and external to the University. The constituent list includes all areas that interact with the University on a budgetary level. This list includes, but is not limited to, University Financial Managers/Budget Officers, Deans, Vice Presidents/Direct Reports to the President, the University President, the University Board of Trustees, Outside Agencies, Contracted Services, and Related Organizations.

Minimum Data Items

At a minimum, all offices are expected to share with our office budget, financial, and associated non-financial data required for planning and managing the University budget. This includes advancement, budget/financial data (transaction detail, chart of account information, etc.), employee related position information (position budget/labor distribution, salaries, employee information, etc.), student financial/general information (Bursar billing, student major/college, credit hour detail, etc.), and any other data required for financial projections, data analysis, and incentive based calculations and distributions.

Guarantees Offered Regarding Security and Privacy

Our office has access and reports on numerous data from all major University Banner modules. The specific details of the data are limited to the appropriate VP, Dean, Budget Officer, or Financial Manager. Much of this access is already defined in the appropriate Banner module through built in security procedures (Financial Manager, Authorized Signer, etc.) or by strictly limiting the access to the specific module (Banner Human Resources). Any request that falls outside the established authorization procedures is referred to the appropriate individual (VP, Dean, Financial Manager, Data Stewards, etc.) for discussion and approval prior to any release of data.

Allow access to or publication of individual data

The Budget Office publishes or participates in numerous University reports that are publicly available to the Lehigh community (University’s Annual Budget book, etc.). The Budget Office generally has access
to all the details that go into creating the specific document. Our office will not release the details (salary position budgets, student registration information, etc.) without the proper authorizations or approvals.

In numerous instances, authorizations are coordinated through other University offices such as the Office of Institutional Research, Controller’s Office, Human Resources, President’s Office, VP for Finance and Administration, etc.

During the budget development process for the New Year, the Budget Office grants access to online budget data entry forms. During the fiscal year, all budget related requests are submitted directly to the Budget Office for approval prior to entering directly into Banner.

Employee access and distribution of data

Because of the work requirements of the budget office, access to highly confidential information is required. This data are strictly protected and not released without proper authorizations. The majority of authorizations occur through systems security and/or related information (Financial Managers, Authorized Signers, etc.) stored in the Banner system. Request for data access outside the normal University procedures is done in consultation with the appropriate parties.

When do you collect or maintain data

Data are collected throughout the year. Depending on the type and history required, data can be stored indefinitely.

Keywords: Data Policy