Raiser's Edge Training & Access Policies

Access to Raiser's Edge (RE) is granted to current, regular employees of the UA and UAF that have had UA FERPA compliance training. UA employees classified as student employees, interns, and agents are not authorized for system access.

- **NEW USERS**
  Employees will only be granted access to RE by attending the RE 101 class and signing a user agreement in the class.

- **LAPSED USERS**
  Users who have not logged an active launch of Raiser's Edge will have their accounts made inactive. To reactivate a disabled account, lapsed users must retake trainings and sign a new user agreement.

  If a user takes the appropriate classes to belong to a certain security group but allows their access to lapse, they will be required to take all classes required to once again belong to that security group. *(For example, if you previously had gift processing access, you will need to take the RE 101, Constituent Maintenance and Gift Processing classes to regain that level of access.)*

- **CURRENT USERS THAT TRANSFER POSITIONS**
  If an employee gains access to RE but then transfers to a different UA/UAF position where they intend to use RE, they must submit a new user access form to retraining@uafoundation.org.

  If the UAF learns of their transfer and has not received a new form, the user's account will be disabled. To re-activate a disabled account, the user must submit a new user access form to retraining@uafoundation.org and will be asked to sign a new user agreement.

  The user will not be required to retake RE training to regain the security rights they previously had so long as their account was active at the time of their transfer and 90 days have not passed since they last accessed RE.

LEVELS OF ACCESS

Level of access is determined by the needs of one's position. There are three types of access: View Rights, Constituent Maintenance, and Gift Processing

- **View Rights**
  By attending the RE 101 class, users will gain access to view information in RE and generate reports, queries, and exports. This is the basic training and access required for all levels.

- **Constituent Maintenance**
  By attending the Constituent Maintenance class, users will gain the ability to manage constituent information including creating constituent, event, and action records.

- **Gift Processing**
  By attending the Gift Processing class, users will gain the ability to enter gift information into RE.

*Any exceptions to the aforementioned policies must be approved by the University of Arizona Development Program leader that oversees your unit or college.