



United States
Department of
Agriculture

Office of the
Chief Financial
Officer

Associate Chief
Financial Officer –
Shared Services

13800 Old Gentilly Road
New Orleans, Louisiana
70129

Bulletin: OCFO 26-02, Workiva Platform Access
Date: August 4, 2026
To: OCFO Staff Offices
Subject: Procedures for Requesting Workiva Platform Access

Purpose

This bulletin establishes the policy and procedures for all Agency and Staff Office personnel to request user access to the Workiva reporting platform.

Background

The Office of the Chief Financial Officer (OCFO), Accounting Policy and Consolidated Reporting Division (APCRD) has adopted Workiva as the standard enterprise platform for collaborative financial reporting, compliance tracking, and data management of the Agency Financial Report (AFR). The migration to Workiva, a cloud-based system, streamlines federal data aggregation, ensures audit readiness, and enhances security. Standardized access controls are required to protect sensitive financial data and optimize license allocation.

Policy

All personnel requiring access to Workiva must be formally authorized under one of three specific user roles based on their official duties.

- **Viewer Role:** Grants read-only permissions to view dashboards, track report progress, and input review comments.
- **Editor Role:** Grants full operational permissions to input financial data, modify templates, format reports, and link source documentation.
- **Owner Role:** Grants full administrative permissions to manage workspaces, configure user permissions, design document templates, and final-approve reporting structures.

No user account will be provisioned without official supervisor approval.



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Procedures

Approval and Provisioning Workflow

1. **Users:** The user should complete and sign the [Workiva User Access Request Form](#) Section A, Boxes 1 - 7 for submission to their immediate supervisor.
2. **Supervisor/Manager Review:** The supervisor/manager must review and sign Section A, Box. 8 to approve the requested access.
3. **APCRD Verification:** OCFO/APCRD will verify the user roles and approve access allocation by completing Section B. OCFO/APCRD will also verify sections of the AFR needed by the user.
4. **Fulfillment:** OCFO Financial Management Services (FMS) will complete Sections C and D, then provision the account within **3 to 5 business** days of final APCRD approval.

Inquiries

Questions concerning this bulletin should be directed to the APCRD by submitting an email to OCFOLANEO-ACFO-FO-APCRD@usda.gov.

Effective Date

This bulletin is effective immediately and remains in effect until officially superseded or canceled.

Eric D. Still
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