*Transact Access Request Form*

*Application Process Steps*

1. *Accountholder/employee completes pages 2 & 3 of the form.*
2. *Accountholder/employee and manager signs and dates page 3 of the form.*
3. *Completed form is emailed to Transact Operations (transactops@northeastern.edu).*
4. *Access request is reviewed. Unsigned forms will not be accepted.*
5. *Once access is granted, accountholder/employee will be contacted with access information.*

***NOTICES TO APPLICANT***

***NOTICE OF APPROPRIATE USE POLICY (AUP) and RIGHT TO CHANGE APPROPRIATE USE POLICY***

All individuals accessing Northeastern University systems are required to read and comply with the Policy on Appropriate Use for Computers and Network Resources. The current policy is located [at](http://www.infoservices.neu.edu/)  <https://cpb-us-w2.wpmucdn.com/sites.northeastern.edu/dist/b/620/files/2020/09/Policy-on-Appropriate-Use-050621.pdf>.

The University reserves the right to change the policy or any portion of the policy, at any time, without prior notice. Changes to the policy are effective upon posting to <https://www.northeastern.edu/policies/>, where the most current version resides.

***NOTICE OF REQUIREMENT TO MAINTAIN CONFIDENTIALITY***

All individuals engaged by the University are required to keep all Northeastern University information strictly confidential. No use or disclosure of any kind is permitted, except only as may be authorized under the terms and scope of employment, engagement and/or as may be explicitly authorized in writing by an officer of the University.

***NOTICE OF ACCOUNTHOLDER AND MANAGER RESPONSIBILITY***

Accountholders are responsible for all transactions conducted under their Transact operator ID.

Managers are responsible for notifying Treasury when an individual whom they have approved for access is transferred or terminated from their department.

Credit card and banking information is NOT to be written down or stored in any type of media, paper or electronic, by the accountholder/employee.

***This page should be kept by the person requesting system***

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| http://www.northeastern.edu/rise/info_for_presenters/documents/neu_R.png |  |

## Transact Access Request Form

|  |
| --- |
| Operator Information |
|  |
| |  |  |  |  | | --- | --- | --- | --- | | Employee Name: |  |  |  | |  | Last | First |  | |
| NUID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone Ext. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| |  |  | | --- | --- | | Job Title: |  | |
| |  |  |  |  | | --- | --- | --- | --- | | |  |  |  | | --- | --- | --- | | Department/Building: |  |  | | |
|  |
| NEU Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| |  | | --- | | Request Information | |
| Request Type:  \_\_\_\_\_\_ New Access  \_\_\_\_\_\_Change Existing Access Transact Operator ID \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Explanation for change to existing access, including duration and expiration date (if any): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
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# Transact Accountholder/Employee Agreement

Northeastern University systems are to be used according to the terms of the Policy on Appropriate Use of Computer and Network Resources (https://www.northeastern.edu/policies). By requesting access, I agree to the terms of the Appropriate Use Policy and further agree to: access, use, distribute and share data only as needed to conduct University business as specified in my position/engagement description, respect the confidentiality and privacy of individuals whose records or data I access, observe all ethical and legal restrictions that may apply to data I view or handle, protect my password and be personally accountable for all work performed under my Operator ID and password, logout when leaving my workstation, report knowledge of security breaches or information security policy violations to NU Information Security and comply with all department and University policies and procedures.

NOTICE: THIS APPLICATION IS NOT AN EMPLOYMENT CONTRACT IN ANY FORM, ALTHOUGH ADHERENCE TO THESE STANDARDS IS A CONDITION OF EMPLOYMENT OR CONTINUED ROLE. ACCESS GRANTED PURSUANT TO THIS APPLICATION DOES NOT GIVE RIGHTS OF ANY KIND AND MAY BE CHANGED BY NORTHEASTERN UNIVERSITY WITHOUT NOTICE AT ANY TIME.

Accountholder/Employee understands that credit card and banking account information is **NOT** to be written down or stored in any type of media including but not limited to electronic media (i.e. Excel, Word, note pad etc.).

**I have read and will abide by the above agreement and the Appropriate Use Policy. Under these terms, I request access to Transact.**

**Employee Name (printed): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Management Approval and Certification**

As the manager or supervisor of the accountholder/employee named above, I approve this request for access to Transact in accordance with University policy. I certify the access requested is necessary to allow the accountholder/employee to perform assigned work-related duties.

In addition, I agree to notify Treasury if the accountholder/employee changes positions, leaves or is terminated from his/her position.

**Please replicate the following employee’s Transact profile (name and operator ID):**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Manager’s Name (printed): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Manager’s Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |
| --- | --- |
| |  | | --- | | Treasury Use Only | |

Operator ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Group Code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Department Code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_