

TEAMS FINANCE SYSTEM & LONG DISTANCE ACCESS REQUEST GUIDELINES

Access to Canutillo Independent School District, TEAMS Finance Modules and access to make long distance calls are controlled through a formal user registration process beginning with a formal notification from the campus/department budget authority, or in some cases from Human Resources.

Granting Long Distance Access Code

Access to a Long Distance Code must be granted based on business requirements. Authorization will be granted when a long distance access code when it is required to effectively carry out the employee's daily duties and must be specifically authorized by the campus/department budget authority.

Each employee will be provided a unique long distance access code and are accountable and can be made responsible for their actions.

- ✓ Long distance access codes require proper authorization prior to being established.
- ✓ To maintain individual accountability and system integrity, a TEAMS Finance System & Long Distance Access Request Form (Exhibit A) must be completed and submitted to the Executive Director of Financial Services for authorization.
- ✓ Authorization process may take up to 3 business days, please plan accordingly.

Granting TEAMS Finance Module Access

Access to the TEAMS Finance Modules must be granted based on business requirements. Privileges will be granted only when there is a legitimate need. The level of authorized access should be the minimum which is required to effectively carry out the employee's daily duties and the level of access, including to other services must be specifically authorized by the campus/department budget authority.

Each user has a unique login username to access the TEAMS system so that users can be linked up to, and are accountable and can be made responsible for their actions.

- ✓ User accounts require proper authorization prior to being established.
- ✓ To maintain individual accountability and system integrity, a TEAMS Finance System & Long Distance Access Request Form (Exhibit A) must be completed and submitted to the Executive Director of Financial Services for authorization.
- ✓ Each request for additional rights to business processes will be made using the access request form.
- ✓ Upon approval by the Executive Director of Financial Services, training will be provided to the 'requestor' (employee requesting the access).
- ✓ Access will be granted once the training has been completed and verified – the process may take 5 to 7 business days, please plan accordingly.

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All requests for access must be made in writing using the TEAMS Finance System & Long Distance Access Request Form (Exhibit A) by the campus/department budget authority or by Human Resources. The request must state:

- ✓ Employee Name (Requestor),
- ✓ Campus/Department Budget Authority Signature,
- ✓ Employee Job Title (i.e. Office Manager, etc.),
- ✓ Campus/Department Assignment,
- ✓ Employee's e-mail address,
- ✓ Date of Request,
- ✓ Services requested: To add, remove, or change access,
- ✓ Services required. (Default services are: Timecard Approval and Surrogate, Purchase Requisition Input and Surrogate, Purchase Requisition Approval and Surrogate, and Access Code for Long Distance Calls)

The new user request form: TEAMS Finance System & Long Distance Access Request Form (Exhibit A) can be found on the Canutillo ISD Website under the Financial Services Division Site.

The Financial Services Division will maintain a record of all written requests on file for audit purposes. The requests will be retained for two years.

Temporary Privilege Accounts

Temporary privilege access will be granted in situations when the employee with primary and/or surrogate access is out of work for a period longer than fifteen (15) business days. Temporary privilege access will be re-evaluated every 6 months. Temporary privilege access will only be issued at the discretion of the Executive Director of Financial Services at the request of the Budget Authority and/or Superintendent of Schools. Duration of such accounts will be negotiated based upon the business need and only when there is no viable alternative solution. These accounts will be limited in function, allowed only to perform the required task(s).

Temporary privilege access will be granted by:

- ✓ Following the Granting TEAMS Finance Module Access Process, as stated above.
- ✓ The Budget Authority submits a memo explaining the situation requiring the access. The memo must be attached to the TEAMS Finance System & Long Distance Access Request Form.

Projects

When privileges are granted for a particular project, these privileges will be revoked at the completion of the project.

Temporary access due to a specific project will be granted by:

- ✓ Following the Granting TEAMS Finance Module Access Process, as stated above.
- ✓ The Budget Authority submits a memo explaining the situation requiring the access. The memo must be attached to the TEAMS Finance System & Long Distance Access Request Form.

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Reevaluation of Access

Privileges will be reviewed on a periodic basis. The Executive Director of Financial Services will initiate a review of all TEAMS Finance Module and long distance code access rights at least twice yearly, to confirm all users. Account and privileges that are no longer appropriate will be promptly inactivated.

- ✓ All user accounts that have been inactive for 60 consecutive days will be reviewed, disabled, and deleted from the system as necessary.

Revoking Access

Access may be revoked if an employee shares his/her username and/or password with other employees. A budget authority can request access granted to an employee to approve timecards or purchase orders on behalf of the budget authority. The request is known as 'Surrogate' access.

As soon as an individual leaves the employment of the Canutillo Independent School District, all system access rights, must be revoked.

All notifications will be filed in a folder ('Leavers') by the Financial Services Division. The notification of 'leavers' provided by HR to the Financial Services Division will be attached to original TEAMS Finance System & Long Distance Access Request Form. On a quarterly basis, coordination will be made with HR on 'leavers' for reconciliation of access.

The following guidelines specify the requirements for separation of employees.

- ✓ Employee access shall be immediately disabled upon separation from the Canutillo Independent School District.
- ✓ As part of the separation exit process, Human Resources will include a line item on the exit interview form requesting Financial Services to sign off as proof of notification to have the account disabled.
- ✓ Reactivating access that has been disabled will require the employee to follow the initial request process.

Enforcement

Those found to have violated this regulation may be subject to suspension of computer access privileges.