REQUEST FOR TOUCHNET ACCESS

Email completed form to marketplace@utk.edu or fax to 974-2710

Full Name:_____   Request Date:_____

NetID:_____   E-mail:_____   Phone:_____

UT Position/Job Title:_____

College:_____   Dept:_____

Merchant: _____

Store / uPay Site: _____

Access Requested:
(a guide to role definitions can be found on page 3)

Bill + Payment	TouchNet Test	TouchNet PROD
Customer Service (FERPA)	☐	☐
Admin	☐	☐
Bursar	☐	☐
Process Credit	☐	☐
Resubmit Failed Batch	☐	☐

Cashiering	TouchNet Test	TouchNet PROD
Cashier	☐	☐
Cashier Supervisor	☐	☐
Executive Admin	☐	☐
Office Admin	☐	☐
Reporting User	☐	☐

Payment Gateway	TouchNet Test	TouchNet PROD
Accountant	☐	☐
Cashier	☐	☐
Bursar	☐	☐
Process Credit	☐	☐
Resubmit Failed Batch	☐	☐

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Marketplace uPay Site	TouchNet Test	TouchNet PROD
Merchant Manager (limited)	☐	☐
uPay Site Manager	☐	☐
Payment Clerk	☐	☐
Accountant	☐	☐

Marketplace uStore Site	TouchNet Test	TouchNet PROD
Merchant Manager (limited)	☐	☐
Store Manager	☐	☐
Fulfiller with Cancel/Refund Rights	☐	☐
Fulfillers	☐	☐
Store Clerks	☐	☐
Store Accountant	☐	☐
Store Contact	☐	☐

TERMS USE OF THIS SYSTEM

The TouchNet system is for authorized use only. Users are expected to comply with Information Technology Policy 110, Acceptable Use of Information Technology Resources. In addition, information in this system is protected under FERPA and by accessing this system you acknowledge you are aware of the restrictions on sharing any such information. Unauthorized or improper use of this system may result in administrative disciplinary action and/or civil charges/criminal penalties. By using this system, you indicate your awareness of and consent to these terms and condition of use.

SECURITY OF USER IDS AND PASSWORDS

Your user ID and password may not be shared with anyone. This account is set up for only your use. You may not log anyone else on with your user ID or password. You may not leave your TouchNet account up and running while you are out of your office. To secure your account, you must either log off the system or protect your PC with a password (e.g. screensaver password). Violation of this policy could result in revocation of access to TouchNet and disciplinary action up to and including termination of employment.

CONFIDENTIALITY OF EDUCATION RECORDS

The confidentiality of education records is governed by The Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. & 1232g, as amended, and its implementing regulations, and the confidentiality provisions of the Tennessee Public Records Act, Tenn. Code Ann. & 10-7-504 (a)(4). Absent the student's written consent, review and approval by the Chancellor, the Dean of Students, the Asst. Provost of Enrollment Services, or the University Registrar (or their designees) is required for the exercise of the statutory exceptions to the confidentiality of education records, including any lawful disclosure to non-University persons or agencies and disclosure under emergency circumstances.

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CONFIDENTIALITY AGREEMENT: I understand that under mandate of federal and state laws identified on this form, University policy protects the confidentiality of education records (including student academic histories) and information contained in education records. Without the student's written consent, I will not disclose education records or information contained in education records to any person or organization outside the University or (2) to any office or individual within the University community unless that University office or individual has been determined by the University to have a legitimate educational interest. I will keep the records and information I retrieve in such a way that they cannot be accessed by unauthorized persons, and when no longer needed for the purpose(s) described below, I will destroy all copies so that they are no longer recognizable. I will use the education records and information in those records solely for the following legitimate educational purpose(s) related to my University employment.

By signing below, I certify that I understand and will comply with the above-stated limitations on disclosure and use of all education records I access through my TouchNet account. I understand that failure to comply with these limitations is a violation of University policy subject to disciplinary action up to and including termination of employment. I further understand that failure to comply with the restrictions outlined on this form concerning security of my user ID and password is a violation of University policy subject to revocation of access and disciplinary action up to and including termination of employment.

Signature: _____ Date: _____

Approval required by Dean, Director, or Department Head

Approved by (Please print):_____ Title:_____

Signature:_____ Date: _____

ROLE DEFINITIONS:

Payment Gateway:

> **Accountant -** An accountant can review all Operations Center reports for his or her assigned merchant(s).

> **Cashier -** A cashier for a credit card merchant can process single authorizations. A cashier for a debit merchant can view debit transaction details.

> **Bursar - A** bursar for a credit card merchant can process credits, settle batches, and remove payment transactions from batches for that merchant type. For a debit card merchant a bursar can settle batches and remove payment transactions from batches. A bursar must be assigned the cashier role in order to process single credit card authorizations. A bursar for an ACH merchant can generate ACH files, mark ACH files as settled, remove payment transactions from ACH files, and delete ACH files. This bursar can also mark payments as rejected and reinitiate payments.

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Process Credit - Assign this role to any user who will have the ability to process credit card credits.

Resubmit Failed Batch - Assign this role to any user who will have the ability to resubmit failed credit card and/or debit card batches. Users with this role will receive the failed batch email notification. **Note:** The user would also need to be assigned the Accountant role

Marketplace uStore Roles:

Store Manager - Responsible for managing store settings, such as the store images, store categories, store payment methods, and shipping rates. Responsible for assigning store clerks, a store contact, a store accountant, and fulfiller users. Responsible for adding and editing products. Responsible for creating store promotions.

Fulfiller - Responsible for fulfilling orders.

Fulfiller with refund/cancel rights - Responsible for fulfilling orders as well as refunding and cancelling orders.

Store Clerk - Responsible for adding and editing products. Responsible for moving products among categories.

Store Accountant - Responsible for viewing reports. Both stores and uPay sites can have store accountants.

Store Contact - Serves as the designated contact who appears on a store site. No responsibilities within the Marketplace Operations Center other than keeping their own contact information up to date on their user profile.

Marketplace uPay Roles

Site Manager - Manages site settings / Assigns payments clerks and accountants

Payment Clerk - Responsible for issuing refunds

Store Accountant - Responsible for viewing reports