



Fortis Responsibilities Access Request Form

Division of Controller

Instructions

Use this form to request access to the Fortis document management system. Each person who needs access must complete a form. Return the completed form to CESC, Room 151, or fax it to 301-279-8456. You will be notified via e-mail when your access is granted.

Requestor Information

Employee Name: _____ Employee ID: _____
First Name MI Last Name

E-mail Address: _____ User ID (Outlook ID): _____

School/Office Name: _____ Work Phone Number: _____

Type of Request: New Request Change Request Delete User ID

User Role

Check the Fortis responsibility you are requesting:

FUNCTIONAL AREA AcctPay DOC ECA

GROUPS

AP-082	AP-FMS Scan	AP-Secretary
AP-1099Guest	AP-FoodSvc	AR-Admin
AP-Accountants	AP-Guest	AR-FMS Prepping
AP-ACH	AP-IA	AR-FMS Scan
AP-Admin	AP-OCTO Invoice Capture	AR-Guest
AP-Administrators	AP-Prepping	DOC-Administrators
AP-Construction	AP-ProcurementSuper	GL-Admin
AP-ECA	AP-Reviewing	GL-CashMgmt
AP-FMS Prepping	AP-Scanning	GL-Payroll

Signatures

Employee's Supervisor: _____ Date: ____/____/____

Director (DOC): _____ Date: ____/____/____

OCTO Use Only

Date Received: ____/____/____

Completed By: _____ Date: ____/____/____

Detailed Instructions

This form is to be used for requests to create, modify, or delete a staff member's Fortis logon ID. Below are detailed instructions for completing and processing a request. Please note that the following items will cause delays in processing a request:

- Incomplete or inaccurate information
- Missing signatures

Completed forms are kept on file for internal and external auditing.

Requestor Information

Provide all information for the staff member who needs a Fortis account. The user ID (Outlook ID) becomes the staff member's Fortis logon ID.

For Type of Request, select the option indicating if this is a new request, a change to a previous request, or a request to delete a user ID. For a change request, all groups checked in the User Role section are added. However, *any existing Fortis groups are not modified as a result of a change request.*

User Role

Fortis grants permissions to users based on group membership. Check all groups to which the staff member should be assigned. Permissions are cumulative. That is, staff members assigned to multiple groups are given the highest level of permission granted by any of those groups. For example, if a staff member belongs to two groups and one group denies viewing access to confidential documents while the other group grants such viewing access, the staff member is granted viewing access to confidential documents.

NOTE: *A request to make a staff member's account look like another staff member's account cannot be processed and will result in a delay in setting up or modifying an account. Examples of such requests are "Please grant Mary the same access as Joe" or "Jane just took over for Bill, please grant her the same permissions Bill had."*

Signatures

Use either black or blue ink to sign this form. For this request to be processed, all signatures are required.

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An OCTO staff member will complete this section after this request is processed.