Purpose

The User Set up Form is for the request for all finance system access or change to access.

Where the central finance team are made aware of changes, for example a change in headteacher, the central finance team will action the request and notify the school that this has been done, (School Business Manager or Finance Officer and Head teacher).

| **Date Requested** |  |
| --- | --- |
| **School** |  |
| **Staff Title** |  |
| **Staff First Name** |  |
| **Staff Last Name** |  |
| **Staff Work Email Address** |  |
| **Role** |  |

Access Requirements

| **System** | **Requirement** |
| --- | --- |
| Finance Portal (Hoge) | Yes / No /Change in Access (Please delete if not applicable.) |
| Budgeting Software | Yes / No /Change in Access (Please delete if not applicable.) |
| Local Bank Account Access | Yes / No /Change in Access (Please delete if not applicable.) |
| Purchase Card View Access | Yes / No /Change in Access (Please delete if not applicable.) |
| Purchase Card | Yes / No /Change in Access (Please delete if not applicable.)  If this is a new request, please state the amount required (in line with the charge card policy). |
| Payroll/Launchpad | Please refer to the SAP E-forms Sign Up Pack on the DGAT website within Members Area- Admin & Finance- Finance Processes- Templates |

Finance Portal (Hoge)

If access to Hoge is required, please indicate the access type.

| **Folder** | **Name** |
| --- | --- |
| Input Access | Yes / No (Please delete if not applicable.) |
| Enquiry Access | Yes / No (Please delete if not applicable.) |
| Approval Access | Yes / No (Please delete if not applicable.) |
| If approval access has been delegated, please state the relevant cost centres and the amount of delegation.  If the finance policy requires Governor approval, please include a copy of the minutes with the request. |  |

Request Confirmation

| **Headteacher** |  |
| --- | --- |
| **Date** |  |

Central Use Only

| **System** | **Access Provided** | **Date/Who** | **Date School Notified** |
| --- | --- | --- | --- |
| Finance Portal (Hoge) |  |  |  |
| Budgeting Software |  |  |  |
| Local Bank Account Access |  |  |  |
| Purchase Card View Access |  |  |  |
| Purchase Card |  |  |  |

Please file the completed form in the central documents folder 2.7.5 User Update Requests, to be held for audit purposes.