Today’s Objectives

- What is a Sponsored Identity?
- Overview of the New Sponsored Identity process
- Discuss SI Requirements
- Demo of the New Sponsored Identity Process
- Important things to remember
- Sponsored Identity System & Process Resources
What is a Sponsored Identity?
A Sponsored Identity is a unpaid, non-Yale individual that does not meet the criteria of being a Student, Employee, or Contingent Worker and needs:

- physical access *(ID Card)* and/or

- electronic access *(VPN, email, system access)*
Eligible Users - Sponsored Identities

Sponsored Identity Types

☐ Chaplains Office Religious Affiliates
☐ Clinical Practice Staff (Non-Yale)
☐ Clinical Research Affiliates (*Study staff, participants, data entry*)
☐ Consultants
☐ Contractors
☐ Daycare Staff
☐ Deans/Directors/Head of Colleges
   Residents and Family Members
☐ Research/Educational Collaborators
☐ Residential College Associate Fellows
☐ Testing/Training IDs
☐ University Committee Members
☐ Vendor
☐ Visiting Student
☐ Visitor
☐ Volunteer Athletic Coaches
☐ Volunteers
☐ Yale Agency Affiliates
☐ Yale Alumni Development Volunteers
☐ Yale Press London
Ineligible Users:

Who is never a Sponsored Identity

- Anyone Paid on a Yale Payroll
- Any YNHH employee that is a medical provider
- VA Employees
- HHMI Employees
- Pierce Laboratory Employees
- Visiting Faculty that should be going through the Provost Office
- Visiting Fellows
- Visiting Students that go through approval processes—Ex: VSR Visiting Students in Research
- Minors in the Lab
- An incoming faculty member, employee or student
- Anyone that needs access to the Workday system
Sponsored Identities

Somethings to understand about Sponsored Identities:

- SI’s do not automatically receive VPN Access.
  - Use VPN Exception form on ITS Website to request if needed.

- SI’s are NEVER entitled to VPN access to the Library

- PIN numbers are not automatically generated for SI’s

- SI’s cannot have access to Workday

- SI’s do not appear in Workday
The Sponsored Identity Process
What to do Differently and When

**Stop Doing**
- Requesting Sponsored Identity via manual form
- Requesting PIN via START

**Start Doing**
- Enter Sponsored Identity requests via SI application at http://your.yale.edu/all-yale-links

**Continue Doing**
- Request ID Cards, VPN access, email and other physical system access as you do now

Request PIN from ITS Helpdesk at helpdesk@yale.edu
You can forward your confirmation email to make the request
Who is involved in the Sponsored Identity process?

Requestor enters request in Sponsored Identity application

Requester receives emails on status throughout the process including completion

IdentityIQ System

Approval emails are system generated and sent to identified approvers

Review and approve requests for SI

Note: Specific SI Types, need 2nd Tier Administrator approval (Yale Agency Affiliates and Testing/Training)

Employee Services receives reports and enters SI into Oracle*

* Note: This step is required until implementation of Workday Financials. SI’s are entered into Oracle to provide access to downstream systems that need access to these identity records.

This does not effect your ability to get a NetID and PIN
Process for creating Sponsored Identities (SI)

1) Enter request into SI application.

2) Notifications will be sent to the Requestor and Approver.

3) System will check for duplicate identities and requestors and approvers will be informed.

4) NetID’s are generated 4-8 hours after approval. Send a copy of your confirmation email to HelpDesk@yale.edu to request a PIN.
Sponsored Identity Request Requirements
Sponsored Identity Roles

Who is the Requestor?

The requestor is the Yale employee responsible for getting the communication that the NetID is ready, and who will facilitate getting the PIN, email, VPN Exception (*if required*) and provide this information to the Sponsored Identity.

Who is the Approver?

The system will automatically route the request to the Strategic Business Partner/Business Partner of the Workday Supervisory Organization on the SI’s record.
What is a Sponsoring Department?

A Sponsoring Department is the department that oversees the Sponsored Identity record. They attest to the business need and are responsible for ensuring that when there is no longer a business need the Identity and all associated access is terminated.

How is the Sponsored Department Identified?

A Workday Supervisory Organization number is assigned to the Identity Record. Departments determine if they will use one main number or various SO numbers.

Additionally, until Workday goes live in July, we also require a Oracle Home Organization number as the identity is entered into Oracle to feed downstream systems.
What is a Sponsor?

A Sponsor is a Yale employee linked to this identity so that if the Sponsor should leave Yale, the Sponsored Identity record should also be terminated or transferred to another person. It can be beneficial to use a Sponsor however, is not required.

Examples include:

1) A faculty member may need a research collaborator to be a Sponsored Identity to access their research database. If that faculty member leaves Yale, the (SI) would no longer have a business need for access and should be terminated.

2) The spouse of a Yale Dean or Head of College may need building access. If the Yale employee leaves the spouse no longer has a business need for access and should be terminated.
What are the Request Types?

Use **Create** to request a SI for someone who has never been at Yale.

Use **Modify** to change an existing record.

Use **Activate** to reactivate a terminated SI.

Use **DeActivate** to terminate the SI.

If you determine an individual was previously at Yale, and they are not in SI system, use Create.
Why do I need to provide Effective Start and End Dates?

All Sponsored Identities must have an effective start and end date. In most cases, the end date can be no more than 2 years from the start date with a few exceptions:

- Residential College Associate Fellows can have 5 years
- Visitors are limited to 3 months
<table>
<thead>
<tr>
<th>Sponsored Identities</th>
<th>Duration</th>
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</thead>
<tbody>
<tr>
<td>Chaplains Office Religious Affiliates</td>
<td>2 - Years</td>
</tr>
<tr>
<td>Clinical Practice Staff</td>
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<td>4 - Years</td>
</tr>
<tr>
<td>Research Affiliates</td>
<td>2 - Years</td>
</tr>
<tr>
<td>Residential College Associate Fellows</td>
<td>5 - Years</td>
</tr>
<tr>
<td>Spouses: Student</td>
<td>4 - Years</td>
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<tr>
<td>Spouses: Faculty/Employee</td>
<td>4 - Years</td>
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<tr>
<td>Testing/Training IDs</td>
<td>unlimited</td>
</tr>
<tr>
<td>University Committee Members</td>
<td>2 - years</td>
</tr>
<tr>
<td>Vendor</td>
<td>1 - Years</td>
</tr>
<tr>
<td>Visiting Student</td>
<td>3 months</td>
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<tr>
<td>Volunteer Athletic Coaches</td>
<td>1 - Years</td>
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<tr>
<td>Volunteers</td>
<td>6 months</td>
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<tr>
<td>Yale Agency Affiliates</td>
<td>4 - Years</td>
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US Address Required

Regular Demographic information (Name, Address, Gender). The address must be a US Address. If the individual does not have a US Address use the departments main business office address.

Date of Birth and Optional Social Security Number

Needed to correlate all identities within all the systems to prevent creation of duplicate identities.

If an individual does not have a Social Security Number or does not provide one, you can request a Dummy # by emailing employee.services@yale.edu. This is required when a request is made in the Sponsored Identity application.
All requests require a business reason as to why the individual needs access. Valid examples include:

- Needs access to research database in Smith lab for collaboration
- Needs access to OnCore for clinical research
- Resident of Yale College needs ID and Access to building
- Vendor needs access to systems to monitor HVAC units in building
- Consultant needs access to system to perform work
Sponsored Identities may be eligible for ID Cards or to appear in the Directory.

If eligible, you will be able to indicate if they should have an ID Card and if they should appear in the directory.

If directory eligible, you will be able to provide a title for the Identity.
Sponsored Identity Application
Sponsored Identity System

https://sgi.its.yale.edu/sponsoredidentity
How to approve or reject a request via email

Emails are sent at every stage of process to requester and approver.
Reminders are sent to approvers at 4th and 8th days.
If no response, is received after 8 days the request is cancelled. And must be reentered if need be.

Approvers use the email link to access the request in IAM application.
https://identity-test.yale.edu:9443/identityiq
How to approve or reject a request in IAM

Approval
Important things to remember
Sponsored Identities

• If an individual already has an active record you will not be able to create a new one

• Only active Sponsored Identity records are being converted—if an individual did not have an active record at conversion time please use create new identity

• The Financial Management Review Checklist and Guide have been modified for the review of Non-Yale Identities to reference Sponsored Identities and Sponsored Identity Tool.
Resources for Sponsored Identity
Resources for Sponsored Identity

Sponsored Identity Process

- For questions on whether an individual belongs in Sponsored Identity, view the following resources at: http://its.yale.edu/secure-computing/identity-and-access-management/accounts-and-access/sponsored-identity
  - Sponsored Identity Procedure
  - Who’s In and Out of Workday
  - IAM Decision Tree

- If questions still remain contact Employee Service Center:
  - Email Employee.Services@yale.edu
  - Phone: 203-432-5552

Sponsored Identity Application

- Search for Sponsored Identity at http://your.yale.edu/all-yale-links

- How to Guides are available at http://its.yale.edu/secure-computing/identity-and-access-management/accounts-and-access/sponsored-identity

- For questions on accessing or using the Sponsored Identity application, contact ITS Helpdesk:
  - Email helpsk@yale.edu
  - Phone: 203-432-9000
Questions?

Thanks for your time!