Today’s Objectives

- What is a Sponsored Identity?
- The Sponsored Identity process
- Sponsored Identity Request Requirements
- Sponsored Identity System Demo
- Sponsored Identity System 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 (includes Vendors)
- Daycare Staff
- Deans/Directors/Head of Colleges Residents and Family Members
- Minor Student Non Research/Clinical
- Minor Student Research/Clinical
- Research/Educational Collaborators
- Residential College Associate Fellows
- Spouses
- Testing/Training IDs
- University Committee Members
- Vendor
- Visiting Undergrad Non-Research/Clinical
- Visiting Undergrad Research/Clinical
- Visitors
- Volunteer Athletic Coaches
- Volunteers
- Yale Agency Affiliates
- Yale Alumni Development Volunteers
- Yale Press London
- Yale Tenant
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 Graduate Students that should be processed through the Post Doc Office
- 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
Process for creating Sponsored Identities (SI)

1) Ensure individual does not have an active Banner or Workday record or existing SI record. This will help prevent duplicate identities being entered.

2) Enter request into SI application.

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

4) System will check for duplicate identities, after the request is submitted, and requestors and approvers will be informed.

5) NetID’s are generated 4-8 hours after approval. Send an email to HelpDesk@yale.edu to request a PIN.
Who is involved in the Sponsored Identity process?

- Requestor enters request in the Sponsored Identity application
- Approval emails are system generated and sent to identified approvers
- Review and approve requests for SI
- Employee Services receives reports and enters SI into Oracle*

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

*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
Sponsored Identity Request Requirements
Sponsored Identity Roles

Who is the Requestor?

The requestor is the Yale employee (active faculty/staff) 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 does not already have a record in the SI System.

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. Remember you must use the same First Name/Last Name and Date of Birth for the record to link and associate an existing NetID.
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 6 months
- Limits are built into the system.
US Address Required

Regular Demographic information (Name & Address). 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

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

Business Reason or Additional Information fields

• To be used for business office reference or approver notes only. IAM System process is automatic—do not put messages to the IAM Administrator in these fields.
Sponsored Identity Application
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 IIQ.
How to approve or reject a request in IdentityIQ
Resources for Sponsored Identity
Resources for Sponsored Identity

Visit the following links for additional information

**Sponsored Identity System Website**

- **Sponsored Identity Procedure 1601 PR.08**
- **Sponsored Identity Application**
  - Search for **Sponsored Identity** on *Its Your Yale Links Page*

- **Quick Guide**
- **Sponsored Identity Approval Guide**

**Additional Support:**

- For technical issues with the Sponsored Identity application, contact the ITS Helpdesk at [helpdesk@yale.edu](mailto:helpdesk@yale.edu) or call 203-432-9000
- For questions on whether this person belongs in Workday or in Sponsored Identity, contact the Employee Service Center:
  - Email: [Employee.Services@yale.edu](mailto:Employee.Services@yale.edu)  Phone: 203-432-5552
Questions?

Thanks for your time!