Sponsored Identities Updates, Reminders and Helpful Hints

September 2017
Today’s Agenda

- What's New? System Enhancements and Changes
- Reminders and Helpful Hints
- Resources
What's New? System Enhancements and Changes
May 2017

- All Identities needing system access or ID Cards must have an identity record in Workday, Banner or Sponsored Identity.

- This includes all visitors, vendors and spouses. A Sponsored Identity Record is required for all ID Card Requests.

  - *Note that NetIDs are generated for all records however you should never generate PINs unless there is a valid business reason.*
August 24

- Gender field is no longer required and has been removed from request form
- Social Security number is no longer required and has been removed from request form
Sponsored Identity Reminders and Helpful Hints
Sponsored Identity

What is a Sponsored Identity?

Sponsored Identity is a category and process for granting access to individuals who have valid business reasons for physical access (ID card) and/or system access (NetID) to Yale resources, and are not a Student, Employee, Contingent Worker, Faculty, or Alumni.

The Yale ID Center will no longer accept paper forms and are requiring departments to enter all vendors, consultants, visitors, or spouses into the Sponsored Identity System.

Please note that a PIN for the NetID must be requested; it is not automatically generated.

Most common errors in processing a Sponsored Identity Request:

- Choose the correct Sponsoring Department for your unit. If your request shows the sponsoring department as “Yale University - S0” or any of the Units that appear on the initial section screen, you have not chosen the correct SO for your unit and your request will be rejected. Refer to the Sponsored Identity Quick Guide for instructions.

- If you are unsure what Sponsored Identity Type to use, please refer to the Sponsored Identity procedure as the definitions for each type are included.

- If you want to check the status of a Sponsored Identity Request, go to the Reporting dropdown and choose “Search Requests.” Determine what field you want to search by, type in the criteria, and click the search button.

- If individuals are returning to Yale and already have a NetID, you will need to
What will you find on the Website?

- A Quick Guide
- A Sponsored Identity Procedure—includes definitions for all SI Types
- Prior training Power Point “What you need to know about Sponsored identities”
- Sponsored Identity Approval Guide
- Identity Management Decision Tree
- Link to the SI Application
- Link to Environmental Health & Safety Website
- Link to ID Center Website

https://its.yale.edu/services/accounts-and-access/directory-management/sponsored-identity
Before you create a new Sponsored identity validate that:

- Any Workday or Banner Record has been terminated and enter the New SI record after the termination date (note there maybe up to a 4-hour lag)

- That a Sponsored Identity Record (active or inactive) does not already exist

If you enter a “New” SI record and an identity already exists, your request will automatically be rejected.
How do I search for an existing SI record?
How do I find out the status of my SI Request?
How would I know that I saved an SI request rather then submitted it?

**Sponsored Identity**

**Sponsored Identity Request Status**

- **Sponsored Identity Request ID:** REQ68977
- **Sponsored Identity Request Status:** Saved
- **Sponsored Identity Request Type:** Create
- **Sponsored Identity Requested Date:** 11-Sep-2017 13:13:00 EDT

**Request Search**

This search page can be used to view any sponsored identity requests including modify, activate and deactivate requests.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Request ID</th>
<th>Type</th>
<th>Display Name</th>
<th>Requester</th>
<th>Business Partner</th>
<th>Strategic Business Partner</th>
<th>Request Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>REQ68977</td>
<td>Create</td>
<td>Poppins, Mary</td>
<td>Scanlon, Nancy L</td>
<td>Scanlon, Nancy</td>
<td>Piscatelli, Holly</td>
<td>11-Sep-2017 13:13:00 EDT</td>
<td>Saved</td>
</tr>
</tbody>
</table>
How do I find a SI request I saved?
How to do I use the calendar?

Instructions on Quick Guide

1. Must select year first, then month and day.
   a) To access years, select Calendar icon.
   b) Click on Month/Year.
   c) Double click on Year.
   d) Use arrows to work through decades.
   e) Select year, month and day.
How to do I choose a Sponsoring Department?

Instructions on Quick Guide

1. Select **Sponsoring Department** by entering Supervisory Org (SO) number if known or search by number, name of individual or department. If you see “Yale University – SO” on your request, you have chosen the wrong one and your request will be rejected.

2. Select enter on keyboard, scroll down page to select from red highlighted options.

3. Place checkmark in selection, page down & click Apply Changes.

*NEVER use an SO from this initial list on the screen.*
Why and when should I use a Sponsor on a Sponsored Identity Record?

A sponsor is a Yale employee that you want to link to the Sponsored Identity so that when the Sponsor leaves Yale, they system automatically identifies the Sponsored Identities associated with the Sponsor for termination.

It is required for Spouses and family members, research collaborators or individuals linked directly to a faculty member.

Some people may choose to use the sponsor field for supervisors or project managers. Note that if the supervisor or project manager leaves Yale you will need to modify all the records that they are sponsors for as they will be terminated within 10 days of the Sponsors termination.
I want to make changes to a Sponsored Identity Record. How can I do this?

In addition to Creating a New SI, users have the ability to Modify, Deactivate and Reactivate an SI record.

The only fields that you cannot or may not be able to change are:

- **Date of Birth** – Can only be changed by an IAM Administrator

- **Sponsoring Department** – Can only be changed by the lead Administrator or Operations Manager (Strategic Business Partner or Business Partner) or IAM Administrator
My Sponsored Identity is being hired or starting as a student. Do I need to deactivate their record?

- No. Once a Workday or Banner record is activated, the SI System will automatically recognize the record and terminate it.

- If your new hire received a different NetID, the auto-termination will not occur as the system did not find a link between the identities. (Name and DOB match). You will need to:

  - Contact the ITS Help Desk and tell them that a duplicate identity was created and the Identities need to be merged in the system giving them the NetID you want to keep. Once this is done, the auto-termination will occur.
We have the NetID for the Sponsored Identity. Now how do I …..?

- Request PIN request through the [Yale ITS Service Portal](#).
- The SI can Activate the PIN through the [PIN Activation Tool](#)

![Image of NetID activation process](image)
Sponsored Identities

We have the NetID for the Sponsored Identity. Now how do I .....?

• Request an email through the [Yale ITS Service Portal](https://its.yale.edu/service-portal/

• If VPN access is required, please complete the [VPN Exception request](https://its.yale.edu/service-portal/

• **Does your Sponsored Identity need an ID Card?**
  Forward the email that includes the word “Completed” to the ID Center along with the charging instructions if applicable. It takes a day for the SI information to flow through to the ID Center system. In addition, the ID Center may have other requirements when sending someone for an ID especially during very busy times of the year.
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* or *ITS Webpage*

• **Quick Guide**

• “**What you Need to know about Sponsored Identities**” Presentation

• **Sponsored Identity Approval Guide**

• **Identity Management Decision Tree**
Additional Support:

- For technical issues with the Sponsored Identity application, contact the ITS Helpdesk at
  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    Phone: 203-432-5552

- For help navigating the Sponsored Identity System contact elizabeth.burnell@yale.edu
Questions?

Thanks for your time!