## 1. How to request a Sponsored Identity

### Login
Enter [https://sgi.its.yale.edu/sponsoredidentity/](https://sgi.its.yale.edu/sponsoredidentity/) in web browser. Enter NetID/Password and click Login.

### Sponsored Identity Type
Select **Sponsored Identity** type from drop-down. Refer to the [Sponsored Identity Procedure](#) for definitions of each SI Type.

### Start and End Dates
Enter duration using calendar. Select year first, followed by month and day. Durations are preset. *(See page 2 for details on how to use calendar)*.

### Vendor/Supplier Name & Number
For Contractors, Consultants and Vendors enter the Vendor/Supplier Name and number.

### First* and Last* Name
Enter First and Last Name with the individual’s legal name. ID Card cannot be issued if name in system does not match identifying documents.

### Address
A US Address is required, if unavailable use Sponsoring Department address. Phone/email not required.

### Date of Birth *
Field is validated. Use calendar to select year, month and day. *(See page 2 for details on how to use calendar)*.

### Business Reason*
Provide brief details on reason for request to inform approver.

### Sponsor Department
a) Click on the blue button that says “Search Sponsor Department.
b) Click in the white box that’s says Search Org Name—do not choose any of the options that appear on this initial screen.
c) Select **Sponsoring Department** by entering Supervisory Org (SO) number if known, last name of manager or part of the Supervisory Org name and hit enter.
d) Scroll down page to select from red highlighted options.
e) Place checkmark in box of the SO you wish to use and click the Apply Changes button.
f) If you see “Yale University – SO” on your request, you have chosen the wrong one and your request will be rejected.

### Sponsor Name Search
Sponsor is not required. A Sponsor is a Yale employee that should be linked to SIs. **Sponsor Name and Title** default if Sponsor Name is entered. *(see additional details in document referenced at page end)*.

### Additional Information
Not required, use if needed. Note that the SI process is automated and any notes in this field are for your information purposes only.

### Do you want to display in Directory?
If the identity will have a yale.edu email address, you must choose “Yes” in order for their name to appear when emailing or in the Outlook email directory.

### Do you want to issue an ID Card?
Only displays for eligible SIs. Defaults to No. Change to Yes, if needed. ID Card must be processed directly with ID Card Center.

### Complete Request
Ensure all required fields indicated by * are entered. Click submit. For detailed information, access [Sponsored Identity Webpage](#).
## 2. How to Guide for Sponsored Identity

### How to Modify, Activate or Deactivate an SI

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Modify</strong></td>
<td>Change <strong>Start or End Dates</strong> and other information. <strong>Date of Birth</strong> can only be viewed and changed by the SI administrator. The <strong>Sponsoring Department</strong> can only be changed by the Lead Administrator or Operations Manager of your department. Contact helpdesk.yale.edu for assistance.</td>
</tr>
<tr>
<td><strong>Activate</strong></td>
<td>Reactivate a deactivated SI.</td>
</tr>
<tr>
<td><strong>Deactivate</strong></td>
<td>Inactivate a current SI record.</td>
</tr>
</tbody>
</table>

Select **Manage SI**
- Select **Actions** to:
  - **Modify**: Change **Start or End Dates** and other information. 
  - **Date of Birth** can only be viewed and changed by the SI administrator.
  - **Sponsoring Department** can only be changed by the Lead Administrator or Operations Manager of your department. Contact helpdesk.yale.edu for assistance.
  - **Activate**: Reactivate a deactivated SI.
  - **Deactivate**: Inactivate a current SI record.
- Select **Submit**.

### Avoiding Duplicate Identities

If an individual has been at Yale before and has a NetID, please make sure to:
- Ensure that they do not already have an active Workday record—if you try to create a New SI it will be rejected.
- Ensure they do not have an active or inactive SI record already—if you try to create a NEW SI it will be rejected.
- If an inactive record exists in SI, reactivate it.
- If no previous SI record exists, make sure that you use the same spelling of first and last name, and Date of Birth associated with their original record and NetID.

### What to do after SI is approved

- Request PIN by entering request through the [Yale ITS Service Portal](https://its.yale.edu/forms-policies/forms/vpn-access-request-form).
- If ID Card is required, forward SI confirmation email, with applicable charging instructions to ID Center.
- If email is needed, enter request through the [Yale ITS Service Portal](https://its.yale.edu/forms-policies/forms/vpn-access-request-form).
- IF VPN access is needed, follow VPN process accessed here, [http://its.yale.edu/forms-policies/forms/vpn-access-request-form](http://its.yale.edu/forms-policies/forms/vpn-access-request-form).

### How to Search within Sponsored Identity

To search for an individual by Name, enter **First** and **Last Name**.
To get a list of all SIs in your dept. select **Sponsoring Department** by entering Supervisory Org dept. number, or name of Strategic Business Partner.

- **Cancel** cancels the request.
- **Clear** clears all entered fields.
- **Save** saves entered fields for 30 days. Update via links to **Saved Requests**.
- **Submit** validates entry of required fields and submits request for approval.

### How to Use Calendar

Click on the **Calendar** icon. Click on **Month/Year**. Click on **Year**. Use arrows to work through decades. Select **year, month and day**. If date change is needed, use the calendar icon to make the change. Note that on an IAM Administrator can change a Date of Birth on an SI record once it has been processed.