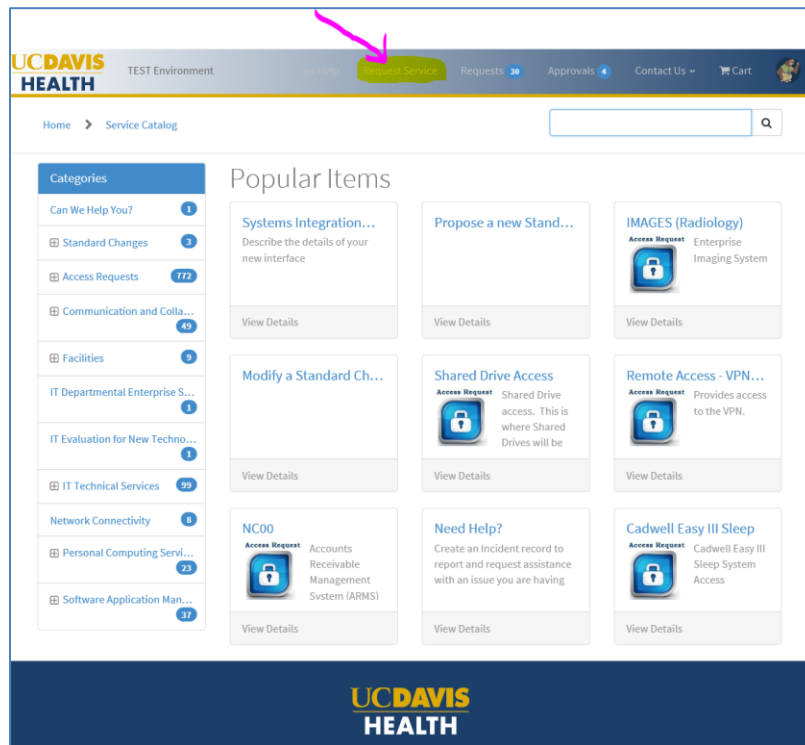


UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

1. Navigate to the Service Catalog: <https://ucdh.service-now.com/itss>
2. Click on Request Service because **you need to build your cart order first.**



3. Search for the catalog items you want order for this person.
EMR, for example:

A screenshot of the 'EMR (Electronic Medical Record) Access New/Change' form. The form title is 'EMR (Electronic Medical Record) Access New/Change' with a subtitle 'Add or change access to EMR records and data for a UC Davis employee.' In the top right corner, there is a yellow 'Add to Cart' button. The form contains several sections: 'Access Request' with a lock icon, 'Access Type' with radio buttons for 'New access' (selected) and 'Change to existing access', 'Access Start Date' with a date and time field set to '04/23/2019 05:32:24 PM', 'Requestor's Department' with a dropdown menu showing 'Interns & Residents', 'List All Requested In-Basket Pools' with a dropdown menu showing 'assorted', 'Grant EMR Access Similar To' with a dropdown menu, and 'Comments' with a text area. At the bottom, there is an 'Add attachments' button.

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

4. Complete the necessary user options and then click ADD TO CART
5. Keep shopping and make sure EVERYTHING the person needs is in the CART (this includes access and equipment related items)
6. Select 'View Cart'

UCDAVIS HEALTH

TEST Environment

Home > Service Catalog > Access Requests > Academic > School of Nursing >

EMR (Electronic Medical Record) Access New/Change

Your item has been added to your Cart. To make changes to the items in your cart, click View Cart

EMR (Electronic Medical Record) Access New/Change

Add or change access to EMR records and data for a UCDS employee.

Access Request

Add or change access to EMR records and data for a UCDS employee.

* Access Type

☒ New access


7. Select 'Change This'

UCDAVIS HEALTH

TEST Environment

You are ordering items for yourself. Change This

Your Cart

Product	Quantity
 EMR (Electronic Medical Record) Access New/Change Add or change access to EMR records and data for a UCDS employee.	1

* Please select an Approver

* Detailed Description of Cart Request

* Brief Cart Title (ex. Access for John Doe)

Continue Shopping Save as Bundle Clear Cart Checkout

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

8. Select option: *'This order is for someone other than me'*

UCDAVIS HEALTH TEST Environment

Home > Service Catalog > Access Requests > Academic > School of Nursing >

EMR (Electronic Medical Record) Access New/Change

For whom would you like to place this order?

☐ This order is for me

☒ This order is for someone other than me

☐ This order is for multiple people

Cancel

EMR (Electronic Medical Record) Access New/Change

Add or change access to EMR records and data for a UCDHS employee.

Access Request

Add or change access to EMR records and data for a UCDHS employee.

Access Type

Add to Cart

Required information

Access Type

Access Start Date

Requestor's Department

Requestor's Email Address

9. Select: *'This order is for a person not listed.'*

UCDAVIS HEALTH TEST Environment

Home > Service Catalog > Access Requests > Academic > School of Nursing >

EMR (Electronic Medical Record) Access New/Change

For whom would you like to place this order?

This order is for a person not listed.

Cancel

EMR (Electronic Medical Record) Access New/Change

Add or change access to EMR records and data for a UCDHS employee.

Access Request

Add or change access to EMR records and data for a UCDHS employee.

Access Type

Add to Cart

Required information

Access Type

Access Start Date

Requestor's Department

Requestor's Email Address

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

10. Select the option that is appropriate for the individual you wish to onboard

For options, “An employee of the UC Davis campus” and “A UC Davis student”

- Search the filtered selection list to locate the person you wish to onboard
- After selecting the appropriate person, complete the onboarding form and select Continue
- Complete the cart order fields (Approver, Title, Description) and select Checkout
- Once the cart request is approved, the individual will receive a UCDH network login (AD account). All items in the cart will then be assigned to the appropriate groups for fulfillment.

For options, “An outside Contractor or vendor” and “A student from an institution other than UC Davis” continue below...

11. Fill in all required fields. Note:

- A valid email address is extremely important. Please be sure it is accurate.**
- If the external affiliate will need ability to login to our network/computers/Citrix, then be sure to select ‘Yes’ to “Does this person need an Active Directory (aka Citrix/Network) Account?”

- Enter PO# if known, otherwise, enter n/a.

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

Complete the form below to provide the details for this person:

* First Name	* UCDH Sponsor
<input type="text"/>	<input type="text"/>
Middle Name	* Department
<input type="text"/>	<input type="text"/>
* Last Name	* Location
<input type="text"/>	<input type="text"/>
* Title	Alternate E-mail
<input type="text"/>	<input type="text"/>
* E-mail	* Does this person need an Active Directory (aka Citrix/Network) Account?
<input type="text"/>	<input type="text"/>
* Primary Phone	Vendor
<input type="text"/>	<input type="text"/>
* StartDate	* Vendor Supervisor
<input type="text"/>	<input type="text"/>
* EndDate	* Vendor Supervisor Email
<input type="text"/>	<input type="text"/>
	* PO Number
	<input type="text"/>

12. Click Continue

13. Click OK on information box

You're almost done!

Complete your order to finalize user creation


You are ordering items for person(s) whose identity needs to be created/updated.
When the onboarding processes have completed and the person is an active user in the system,
the cart order will be released for fulfillment.

14. Complete the cart order fields




- Select the approver
- Enter the cart title and a description





UCDH Onboarding Process for New Campus, TES and EXTERNAL Users


You are ordering items for Jane Doe. [Change This](#)

 You are ordering items for a person or persons whose Identity needs to be created or updated. Orders for individuals currently being onboarded will not be released for fulfillment until the onboarding process has been completed and the person is an active User in the system.

Your Cart

Product	Quantity
 EMR (Electronic Medical Record) Access New/Change Add or change access to EMR records and data for a UCDHS employee.	-  



 Please select an Approver
 
* Brief Cart Title (ex. Access for John Doe)


* Detailed Description of Cart Request


[Continue Shopping](#) [Save as Bundle](#) [Clear Cart](#) [Checkout](#)

15. Then click Checkout.

16. Note the REQ number for reference when contacting the helpdesk:

 **REQ0013843** Access for Jae Doe 

Number	Short description
REQ0013843	Access for Jae Doe
Description	Priority
Access for Jae Doe	4 - Low
Request state	Opened by
Pending Approval	Alanne Whitaker
Requested for	Created
Jane Doe	just now
Updated	
just now	

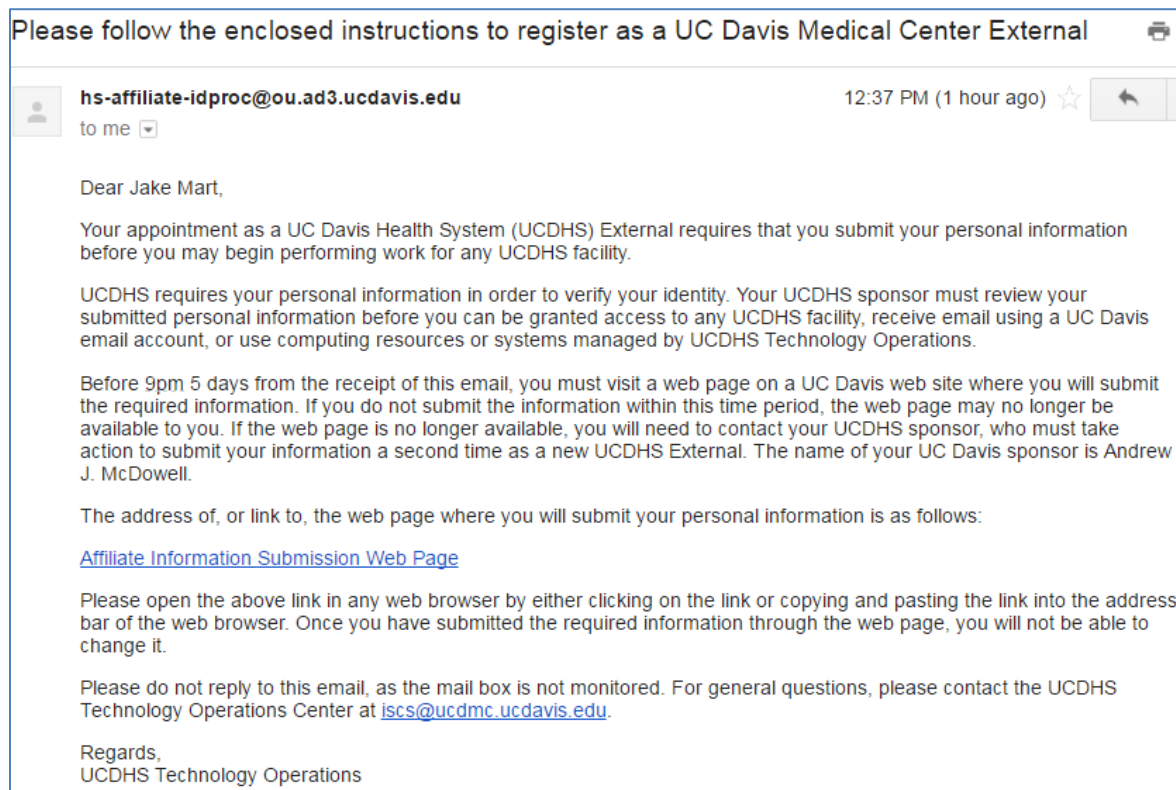
Waiting for approval from: Jeremy Chadwick

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

What happens next...

Identity Information Submission

After the supervisor/manager approves the Service Catalog request an email is sent to the **External Employee** to provide their identity information. The email link in the notification is active for five days from receipt of the email. This can be extended up to 30 days from submission of the request. Extensions can be requested by emailing HS-IS Access Request hs-access.request@ucdavis.edu



Email to External Employee to obtain identity information

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

The link resolves to the **External Information Submission** form. The **External Information** tab must be reviewed, completed and submitted.

External Information Submission Form					
External Information		External Agreement		Why Do We Want This?	
Appointment Information (for your information)					
External ID		H00000105		Dept Code 929324	
Appointment Period:		Start 08/01/2016		End 08/01/2017	
Personal Identifying Information (required)					
Your Name:		First Feather		Middle M	
		Last Duster		Suffix Jr (e.g. Jr, Sr)	
Birth Date		07/21/1996 mm/dd/yyyy is required date format			
SSN #			Passport # 132457680 PIN #	
Enter Passport and PIN if you have no SSN					
Contact Information (required)					
Phone		530-752-0373			
Email		bobcook@ucdavis.edu			
Student Status (optional)					
<input checked="" type="checkbox"/> I was a UCD Student, or am a current student on PELP or filing fee status					
Student ID		123456789 Required only if you check checkbox			
Employee Status (optional)					
<input checked="" type="checkbox"/> I was a UCD Employee					
Employee ID		987654321 Required only if you check checkbox			
Certify your agreement with UCDHS policy					
<input checked="" type="checkbox"/> I have read the external agreement and I agree					
<input type="button" value="Submit"/>					
Please read the external agreement before submitting. Multiple submissions of this form are not advised.					

External Information Tab

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

After submitting the **External Information Submission** form the **Information Submitted** details appear.

External Information Submission Completed

Information Submitted

Appointment Information

External ID: H00000105 Dept Code: 929324
Appointment Period: Start: 08/01/2016 End: 08/01/2017

Personal Identifying Information

Your Name: First: Feather Middle: M
Last: Duster Suffix: Jr
Birth Date: 07/21/1996
SSN: Passport: PIN:

Contact Information

Phone: 530-752-0373 Email: bobcook@ucdavis.edu

Student Information

Student ID: 123456789

Employee Information

Employee ID: 987654321

Submission Status

**External's information was submitted on:
July 22, 2016 2:24:05 PM PDT**

Additional changes to your information are not advised at this time.
Print this screen as a record of your submitted information.

External Information Submission Completed

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

The sponsor selected during the request process in the external onboarding form will receive an email requesting to validate the external employee identity information. This must be completed within five business days within the receipt of the email. Here is an example of the email sent to the sponsor:

From: HS-Affiliate Identity Processing
Sent: Monday, July 25, 2016 1:07 PM
To: Andrew J McDowell
Subject: Please follow the enclosed instructions to accept your new UC Davis Medical Center External

Dear Andrew J. McDowell,

You have been identified as the sponsor of a UC Davis Health System (UCDHS) external. The external, whose name is Jake Mart, has submitted their personal information to UCDHS. At this time, you will need to review this external's information and indicate if the information agrees with what you know about the external. Your approval must be submitted before the external can be granted access to UCDHS facilities, receive a UC Davis email account, or use computing resources or systems managed by UCDHS Technology Operations.

The address of, or link to, the web page where you will submit your approval or rejection of the external is as follows:

[Sponsor Verification Web Page](#)

Please open the above link in any web browser by either clicking on the link or copying and pasting the link into the address bar of the web browser. Once you have submitted your approval or rejection of the external through the web page, you will not be able to change it.

You have until 9pm 5 days from the receipt of this email to submit your approval or rejection of the affiliate.

Please do not reply to this email, as the mail box is not monitored. For general questions, please contact the UCDHS Technology Operations Center at iscs@ucdmc.ucdavis.edu.

Regards,
UCDHS Technology Operations

Email to Sponsor

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

The 'Sponsor Verification Web Page' link in the notification resolves to the **External Information Verification Form**. Select **Accept** or **Reject** to complete the request.

Selecting **Accept** will continue the onboard process and release the request.

Selecting **Reject** will stop the onboarding process, notify the requestor that it was rejected, and close the request.

External Information Verification Form

To expedite the onboard process, be sure all the key players respond timely:

1. Requestor submits the onboard request
2. Approver approves the request
3. External Employee completes and submits the External Information Verification form
4. Sponsor accepts the External Information Verification form

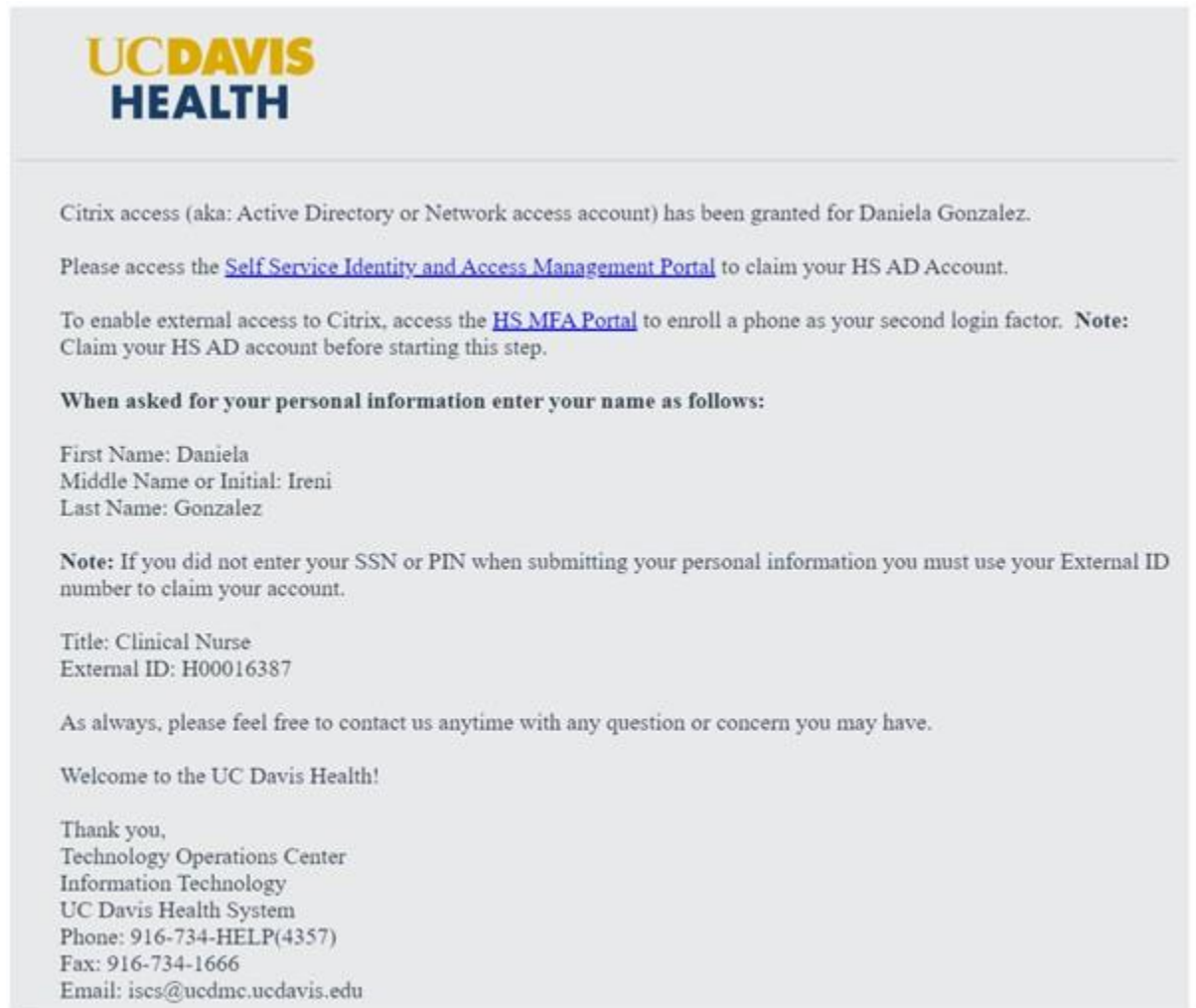
After the sponsor accepts the identity form, it can take up to 4 hours before the request is released for fulfillment. At that time, the system will also notify the external to claim their accounts. See below.

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

Active Directory & Kerberos Claim Account Notifications

Active Directory:

If Yes was selected for needing an Active Directory (aka Citrix/Network) Account, the external employee will receive a notification to claim that account. Example:




After selecting the [Self Service Identity and Access Management Portal](#) link, the external will enter their identity verification information to obtain their account username and set their password.

UCDH Onboarding Process for New Campus, TES and EXTERNAL Users

Kerberos:

As part of the onboard process, all external users are populated in the UC Davis Campus system to allow for claiming a Kerberos account. This claim account process also sets up a UC Davis email account. Example notification:



Daniela Gonzalez,

Your UC Davis Computing Account (Kerberos) is currently being processed. This account will provide you with a UCDH Email address and access to UC Learning (LMS). Please allow up to 24 hours before you attempt to claim your Computing Account.

To claim your Computing Account please visit the Computing Account Services Portal and select the "**Get your UC Davis Computing Account**" link.

If you did not enter your SSN or PIN when submitting your personal [information](#) you must use your External ID number to claim your account.

[UC Davis Computing Account Services Portal](#)

Note: If you did not enter your SSN or PIN when submitting your personal [information](#) you must use your External ID number to claim your account.

Title: Clinical Nurse
External ID: H00016387

As always, please feel free to contact us anytime with any question or concern you may have.

Welcome to the UC Davis Health!

Thank you,

Technology Operations Center
Information Technology
UC Davis Health System
Phone: 916-734-HELP(4357)
Fax: 916-734-1666
Email: jscs@ucdmc.ucdavis.edu

[UC Davis Computing Accounts Services Portal](#)