Today’s Objectives

- To provide an understanding as to what a Sponsored Identity is.
- To Discuss the Process for creating a Sponsored Identity
- Go over the SI Form and some of the errors we are seeing
- Additional steps you may need to follow for VPN Access
- Discuss timeline for new automated system
What is a Sponsored Identity?
A Sponsored Identity is a unpaid, non-Yale individual that needs:

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

  and/or

- electronic access (*VPN, email, system access*) and does not qualify to be entered into Workday.
Resources to help you:

- ITS Website: NetIDs: Who can use them?
- Guide maintained by HR: Yale Population: Who's In Workday and Who's Not
Sponsored Identities

Who is never a Sponsored Identity

1) Anyone Paid on a Yale Payroll
2) Any YNHH employee involved in Patient Care/Clinical Practice Activities
3) VA Employees
4) HHMI Employees
5) Visiting Faculty that should be going thru the Provost Office
6) Visiting Fellows
7) Visiting Students that go through approval processes—Example VSR
   Visiting Students in Research
8) Minors in the Lab
9) Anyone that needs access to the Workday system
Sponsored Identities

**Somethings to understand about Sponsored Identities:**

- Sponsored Identities do not automatically receive VPN Access.
  - Use the VPN Exception form on the ITS Website to request VPN Access.

- PIN numbers are not automatically generated for Sponsored Identities.

- Sponsored Identities are NEVER entitled to VPN access to the Library.

- Sponsored Identities cannot have access to Workday.

- Sponsored Identities do not appear in Workday.
How do I create a Sponsored Identity?
Process for creating Sponsored Identities

1) Ensure that the individual does not have an active Workday Record
2) Completely Fill out the Sponsored Identity Request Form.
3) Obtain the Appropriate Approvals
4) Follow submission instructions on the bottom of the form.
5) Remember that Date of Birth and Social Security number should never be sent via email.
6) Once the form is reviewed for completeness, it is sent to the Employee Service Center.
7) If the Employee Service Center does not send the NetID to the Preparer/Requestor listed on the form within 3 business days please call them.
The Sponsored Identity Request Form
Sponsored Identity Form

Who is the Requestor?

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

Who is the Approver?

The approver is the Lead Administrator or Operations Manager of the unit. If you do not know who that is, please contact your business office.
What is the Request Type?

Use **Create** if you are requesting a Sponsored Identity for someone that has never been at Yale.

Use **Modification** if you are making changes to an existing record.

Use **Re-Activation** if you are reactivating a Sponsored Identity that was terminated or if you are asking for a previous employee to become a Sponsored Identity.

Use **De-Activation** if you are terminating an Identity
What is a Sponsor?

A Sponsor is a Yale employee that should be linked to this identity so that if the Sponsor should leave Yale, the Sponsored Identity record should also be terminated.

Examples include:

1) A faculty member may need a research collaborator to be a sponsored identity in order for them to access their research database. If that faculty member should leave Yale, the Sponsored Identity would no longer have a business need to have access and should be terminated.

2) The spouse of one of Yale’s Deans or Head of College may need building access. If the Yale employee should leave then the spouse would no longer have a business need to have access and should be terminated.
Who is responsible for this Sponsored Identity?

Responsibility is determined by the **Oracle Org number** provided on the form. It is the Org number (6 digits) and not the name of the Organization.

*In the near future, you will also need to supply the Supervisory Org number.*

The NetID field refers to the NetID of the Sponsored Identity. If you are modifying, re-activating or terminating a sponsored identity you should provide this.
## Roles of Sponsored Identity or SI Types

- Chaplains Office Religious Affiliates
- 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
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. There are some exceptions such as Residential College Associate Fellows who can have 4 years and Visitors and Contractors which will have no more than a year.

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 please use the departments main business office address.
Date of Birth and Social Security Number

We need this information in order to correlate to all the identities within all the systems. We do not want to create duplicate identities and need this information to ensure that we don’t.

If an individual does not have a Social Security Number or refuses to provide one you can request a Dummy # from the Payroll department. Currently you can put “Use Dummy #” on the form and one will be assigned however once we move to a new automated system, the dummy number will need to be entered at the time of the request.

NEVER email either of these pieces of information as email is not secure. You can fax it to a secure fax but do not email.
All request require a business reason as to why this person needs to have 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
Workday to Sponsored Identity Conversion
HR is reviewing Workday records with the Provost and some people currently in Workday may need to become Sponsored Identities. If this happens....

- Terminate the Workday Record
- Complete a Sponsored Identity Form to reactivate a record as a Sponsored Identity. Make sure to indicate on the form that person was an employee that was just terminated and give the date.
Changes in Sponsored Identity Process and New System
In a few weeks, we will be introducing a revamped Sponsored Identity Form, enhanced instructions and a new process for submitting them for processing. Messages will be distributed to Lead Administrators and Operations Managers as is standard Business Operations practice.

This is an interim step until the New Sponsored Identity System is implemented scheduled for sometime in late November to early December.

Until the implementation of Workday Financials, the employee Service Center will still manual work to perform in order to enter records into Oracle so that down stream systems have access to these identity records.