

Quick Guide: Add a Non-Employee to IMS

Subject: Adding a Non-Employee to IMS.

Intent: Instructions on how to add a non-employee to IMS.



Overview

The Identity Management System (IMS) application request tools enable UPMC managers to submit online user account requests for specific UPMC computer applications. All account requests processed through IMS must be associated with an E-Sign-On account, which identifies the person for whom the request is being made.

If you wish to make a request for someone who is not a UPMC employee, such as a contractor or vendor, you will need to sponsor an E-Sign-On account for this person. Adding non-employees to IMS is a manual process. To do this, fill out an online form with the non-employee's identity data and personnel information, and submit the form through IMS.

In this Quick Guide, you will learn how to:

- [Add a Non-Employee to IMS.](#)

Add a Non-Employee to IMS

To add a non-employee to IMS, follow these steps:

1. Open Internet Explorer, go to the IMS Web site (<https://ims.upmc.com>), and log on using your E-Sign-On or UPMC Network ID and password.
2. Click the **My Staff** heading.
3. Click the **Add Staff** option.
4. Select the category from the **Request is for** drop-down that most closely matches the non-employee for whom you are requesting an account. Depending on your selection, you may be required to answer additional questions regarding the nature of the non-employee's job duties.

Non-Employee - Type 

Non-employees are broadly classified into several categories. Select the category from the **Request is for** drop-down that most closely matches the non-employee for whom you are requesting an account. Additional description of that category will then appear on the page.

Non-Employee - Type information:

Request is for:

* A Health Care Provider is an individual who uses or needs UPMC resources to provide health care services to patients.

Non-employees are currently divided among these categories:

Non-Employee Type	Description
Vendor	A company or individual that does business with UPMC. Vendors typically provide goods and/or services to UPMC. Individuals who represent or work for a vendor are known as Vendor Staff.
<u>Vendor Support Account</u>	Account which can be disabled or enabled as needed for vendor maintenance and support purposes.
Health Care Provider	An individual who uses or needs UPMC resources to provide health care services to patients.
User	An individual who is classified neither as vendor staff, nor as a health care provider, but still has reason to be in the IMS system. Students, credentialed faculty, and researchers are examples of users. If you select this option, you must also select a type of user from the following drop-down.
Regulatory User	A regulatory user refers to a government surveyor or auditor who may require system access to perform official government business.
Researcher	User whose primary job function is research.
Drug Company Clinical Trials Rep/Auditor	User who monitors clinical drug trials being conducted at UPMC on behalf of the drug company that he or she represents.

- If the request is for a **User**, a drop-down menu will appear which lets you further classify the user. The drop-down allows you to select from the following types of users:

Type of User	Description
Credentialed Faculty	A member of the university faculty. Personal information for Credentialed Faculty often preexists in the system. You can automatically import that information into the request form if you select SSN as the identifier on the next page.
Student	University student.
Proactive Request	To ensure that IMS and Human Resources records are synchronized, IMS receives data about staff members nightly from the HR PeopleSoft system. Select this option if the user requires application access immediately, but you think that the user may eventually be entering the IMS system through the HR PeopleSoft system. Selecting this option will prevent a duplicate E-Sign-On ID from being created when the user does come into IMS through PeopleSoft. When selecting this option, it is strongly suggested that you select SSN as the identifier on the next page.
Other	User who does not fall into any of the preceding categories. Select this option and a field will appear in which you must supply a reason for wanting to create an ID for the user.
Volunteer	User who serves in a typically unpaid capacity at a UPMC facility.
Observership	User involved as a clinical observer or “shadow” of a UPMC staff member.

To continue, select the type that most closely matches the non-employee you are adding and click the **Submit** button.

6. Enter the non-employee's name in the **Name** field.
7. Enter a **Unique Identifier** by clicking the radio button that corresponds to the number you intend to enter. (The unique identifier can be an individual's driver's license number, SSN, Passport, Visa, Beacon ID, Microsoft ID, Unique Surveyor ID, Partner ID or University ID – which requires a school selection from the **College Name** drop-down).
8. Enter the non-employee's **Date of Birth** by selecting month, day and year from the drop-down menus. The 4-Digit Pin filed auto-populates based on the unique identifier. If the user already exists in the system, you will receive a pop-up notification. Click **Cancel** to prevent creating a duplicate record.

Request a New UPMC E-Sign-On Identity

Enter the identity information for the Non-employee. The last four digits of the identification number will become the default PIN, although you can change the PIN if desired.

* Note : Fields in the **BOLD** titles are mandatory.

E-Sign-On Identity Information

* Name : Last Name First Name No MI MI

Note: The Driver's License, SSN, Passport or Visa Number that you enter for this user will be used by the Help Desk for all future validation. Please verify your entry prior to submission; accuracy is vital.

* Driver's License Number State

Social Security Number - -

Passport Number

Visa Number

Beacon Identifier

MicroSoft ID

Unique Surveyor ID

University Student ID College Name: --Select--

Partner ID Partner Name: --Select--

* 4-digit PIN:

* Date of Birth: --- / --- / ---

Proceed with Request

9. Click the **Proceed with Request** button.

10. Review the information you just entered and when satisfied of its accuracy, click the **Confirm and Continue** button.
11. Complete the required fields (denoted by bold-face type prefaced by an *) in the **Personal Information** and section of the screen.
12. You must choose a Job Title by clicking the **Select a Job Title** link and searching for the appropriate job title. If you can't find the title you want, enter the first few letters of the job title and then click the search button. To get "Resident" for example, type in "res" and click the search button. Not all job titles are available. Choose the closest match.
13. For the Email fields, enter addresses for the non-employee's manager, the account coordinator (may be the manager), and a valid address for the non-employee (to which IMS activation codes may be sent for initial login registry).

Personal Information	
* UPMC E-Sign-On Password:	<input type="text" value="Upmc#992"/>
Date Account Needed:	05 / 22 / 2012 (mm/dd/yyyy format)
Date Account Expires:	05 / 31 / 2013 (mm/dd/yyyy format)
* Job Title:	Contractor Select Job Title
* Department ID:	50027 Business Unit: UPP00 <small>(ex: 50027 or 2307)</small>
* Department Name:	Health Care
* Hospital Affiliation:	UPMC Magee-Womens Hospital
* Office Address 1:	300 Halket
Office Address 2:	<input type="text"/>
Office Address 3:	<input type="text"/>
* City:	Pgh
* State:	PA
* Zip:	15213 - <input type="text"/>
Phone:	1-(<input type="text"/>) - <input type="text"/> - <input type="text"/> Ext. <input type="text"/>
* Manager's Email:	manager@upmc.edu
* Account Coordinator's Email:	accountcoord@upmc.edu
Email Address:	user@email.com Note: Enter valid email address of the above person. This will be used by IMS to communicate the activation code. Activation Code will be used for registration to IMS.
<input type="checkbox"/> Home Address	
<input type="button" value="Proceed with Request"/>	

Note: The non-employee's initial ESO password for IMS login will be displayed in the **UPMC E-Sign-On Password** field.

14. Non-employee users requiring clinical application accounts must supply a **Home Address**.
15. If you intend to request a clinical application for the user, place a check in the **Home Address** box and enter the user's address.

Home Address
The user's home address is required for clinical applications / PHI access requests.
Home Address
Street Address :
City:
State: PA ▾
Zip:
Country: USA ▾

16. Click **Proceed with Request**.

System Access Agreements

If the non-employee will require computer access, select the radio button confirming that the non-employee signed the [UPMC Staff Access Agreement](#). You may also choose to [upload](#) the agreement later. If you have not yet had the non-employee sign the agreement, perform these steps:

1. Click the associated link to view the agreement and save a copy of the agreement to your workstation or laptop.

Non-Employee Requirements

Upload the agreement later

Check this option to confirm that the Non-UPMC employee signed the [UPMC Computer User Access Agreement](#).
Once signed, browse for and upload the completed document.

Note:
1) Signing a confidentiality agreement is required for all UPMC Non-Employees.

No computer access is required

2. Print the document.
3. Fill in the blanks and then have the non-employee read and sign the document.
4. Scan the signed document into **.pdf**, **.doc**, **.docx**, **.jpg**, **.gif**, or **.png** format.
5. Upload the scanned document to IMS by clicking the **Browse** button, and then navigating to and selecting the document. The file size of the agreement you are uploading must not exceed 4 megabytes.
6. When the path to the scanned document appears in the field to the left of the Browse button, click the **Upload Document** button.
7. If the non-employee does not require computer access, click the **No Computer access is required** radio button.

Vendor Support Accounts

A vendor support account is an account which can be disabled or enabled as needed for vendor maintenance and support purposes. To create the account:

1. Follow the instructions on page 3 to create a new ESO ID for the vendor account.
2. When you reach step 4, select **Vendor Support Account**.
3. Continue the request by entering identifying information for the Vendor Support Account.
4. A limited subset of vendor support applications will be available for request. When requesting application access for these accounts, the vendor must adhere to the [system access agreement](#).
5. These accounts are disabled by default. When the account is ready for use, you must enable it by selecting **Enable/Disable Vendor support accounts** under the **My Staff** menu.
6. A list of the Vendor Support Accounts you created will appear. Click the account you wish to enable.

Enable/ Disable vendor support account(s)					
Enable/ Disable vendor support account(s)					
Name	UPMC E-Sign-On	Job Title	Department	Hospital	Status
pyaram,vendorsupport NOMI	pyarav5211	gsdg	werwe	No Hospital Affiliation	Disabled
pyaram,vendorsupport NOMI	pyarav8447	gsdg	adfg hdf	No Hospital Affiliation	Disabled

7. Click the **Enable** box and select the duration the account will be active from the drop-down. The account will automatically disable after the selected duration expires.

Note: You can also enable Vendor Support Accounts by searching for the ESO ID associated with the account from the Add/Modify/Revoke Application Access option under the Request Access Menu.

Requesting Application Access for Non-Employees

1. If necessary, you can now request application access for the non-employee. In the **User Account Request** section of the screen, place check marks in the boxes next to the accounts you want to create for the non-employee.
2. To request clinical applications (such as Cerner or Mars) you must check the **Show Clinical Applications** check box. Privacy Officer approval is required for non-employee clinical application access. To ensure that the approval email is routed to the correct privacy officer, select the facility in which the account will be used from the “Display Applications by Location” drop-down menu.
3. When selecting clinical applications, a justification field appears in which you must specify a reason for the request. Also, if you have not already entered a home address for the user, you will be asked to do so at this point.

Display Applications to request by Location : UPMC Presbyterian [edit](#)

Show Clinical Applications

Please justify your request for clinical application access:

Health care provider requires access to perform job functions.

User Account Request

Accounts

<input checked="" type="checkbox"/> Network	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Cerner	<input type="checkbox"/> Connect@UPMC	<input type="checkbox"/> Sentillion
<input type="checkbox"/> Teletracking				
<input type="checkbox"/> 3M Reference	<input type="checkbox"/> ADGroups	<input type="checkbox"/> Cognos	<input type="checkbox"/> CoPathPlus	<input type="checkbox"/> E Procurement
<input type="checkbox"/> eVoucher	<input type="checkbox"/> Imagecast	<input type="checkbox"/> Initiate EMPI	<input type="checkbox"/> Kronos Timekeeper	<input type="checkbox"/> Muse
<input type="checkbox"/> OneStaff	<input type="checkbox"/> Peoplesoft Financials	<input type="checkbox"/> Physician Signout	<input type="checkbox"/> Rad Dictaphone	<input type="checkbox"/> Sharepoint External Access
<input type="checkbox"/> TeamNotes	<input type="checkbox"/> Theradoc	<input type="checkbox"/> TMS Enterprise	<input type="checkbox"/> Travel UPMC	<input type="checkbox"/> U-Pay
<input type="checkbox"/> UPMC Remains Tracker	<input type="checkbox"/> WePay			

Note: The clinical application justification field accepts only letters, numbers, slashes (/), parentheses, underscores, hyphens (-) and commas (,).

4. Click the **Proceed with Request** button.

5. Enter the associated information required for each application account. In the following example, the request is for e-mail, network, and MARS accounts.

Account Request Details

Email

E-Mail Address:

Comments / Special Instructions:

* GLOBAL ADDRESS LIST (GAL) NOTE: Please include the exact GAL changes to be made in the Comments field.

MARS

Username:

Access Requirements (Check all that apply)

<input checked="" type="checkbox"/> Electronic Medical Records	<input type="checkbox"/> Fiscal Records	
<input type="checkbox"/> WPIC Psych Records	<input type="checkbox"/> BRH Psych Records	<input type="checkbox"/> HHS Psych Records
<input type="checkbox"/> HHG Psych Records	<input type="checkbox"/> MCH Psych Records	<input type="checkbox"/> SSH Psych Records
<input type="checkbox"/> BRH DETOX	<input type="checkbox"/> Mercy DETOX	<input type="checkbox"/> Mercy Psych

(Upon receipt of this form ISD Security will forward this request for additional approval if WPIC and/or Fiscal Records are requested.)

Comments / Special Instructions:

Network

Network ID:

Attach To Organizational Unit (OU):

Comments / Special Instructions:

* SHARED DRIVE NOTE: Please provide the fully delimited share path in the Comments field. An example of a fully delimited share path is as follows: \\servername\sharename\$\

* GLOBAL ADDRESS LIST (GAL) NOTE: Please include the exact GAL changes to be made in the Comments field.

6. Review the Account User Information, and click the **Proceed with Request** button.
7. Review the request form for accuracy, when you are satisfied, click the **Submit** button.
8. A confirmation notice will appear on your screen. Additionally, e-mails will be sent to any necessary approvers or other parties involved with the request. **A privacy officer must first approve clinical application access for non-employees.**

Additional Help

For further help, please e-mail your request to imsrequest@upmc.edu. An IMS representative will contact you within one business day.

Document Information

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