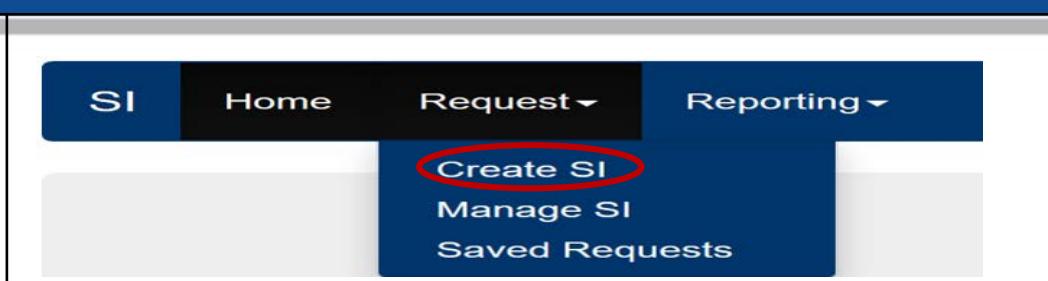


# Quick Guide: How to request a Sponsored Identity

Yale

<p><b>Login</b>            Enter  <a href="https://sgl.its.yale.edu/sponsoredidentity/">https://sgl.its.yale.edu/sponsoredidentity/</a> in web browser.            Enter NetID/Password            Click Login</p>	 <p>The navigation bar includes a 'SI' button, 'Home', 'Request' (with a dropdown menu), and 'Reporting' (with a dropdown menu). The 'Create SI' button in the 'Request' dropdown is circled in red.</p>
<p><b>Sponsored Identity Type</b></p>	<p>1. Select <b>Sponsored Identity</b> type from drop-down.</p>
<p><b>Start and End Dates</b></p>	<p>2. 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).</p>
<p><b>First* and Last* Name</b></p>	<p>3. Enter <b>First and Last Name</b> with the individual's legal name. ID Card can not be issued if name in system does not match identifying documents.</p>
<p><b>Address Phone and Email</b></p>	<p>4. A US Address is required, if unavailable use Sponsoring Department address. Phone/email not required.</p>
<p><b>Gender*</b></p>	<p>5. Used as confirmation data for ID Card Center.</p>
<p><b>Date of Birth *</b></p>	<p>6. Field is validated. Use calendar to select year, month and day. (See page 2 for details on how to use calendar).</p>
<p><b>Social Security Number*</b></p>	<p>7. Required field. If unavailable or unknown request a "dummy" SSN via <a href="mailto:employee.services@yale.edu">employee.services@yale.edu</a>. (see page 2 for how to save a request if you entered information but are waiting for dummy SSN).</p>
<p><b>Business Reason*</b></p>	<p>8. Provide brief details on reason for request to inform approver.</p>
<p><b>Home Organization</b></p>	<p>9. Enter the Oracle <b>Home Organization</b> number responsible for this identity (not needed after 6/30/2017). Used by Oracle for downstream applications.</p>
<p><b>Sponsor Department</b></p>	<p>10a. Select <b>Sponsoring Department</b> by entering Supervisory Org (SO) number if known or search by number, name of individual or department.            10b. Select enter on keyboard, scroll down page to select from red highlighted options.            10c. Place <b>checkbox</b> in selection, page down &amp; click <b>Apply Changes</b>.</p>
<p><b>Sponsor Name Search</b></p>	<p>11. Sponsor is not required. A Sponsor is a Yale employee that should be linked to SIs. <b>Sponsor Name and Title</b> default if Sponsor Name is entered. (see additional details in document referenced at page end).</p>
<p><b>Additional Information</b></p>	<p>12. Not required, use if needed.</p>
<p><b>Do you want to display in Directory?</b></p>	<p>13. 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.</p>
<p><b>Do you want to issue an ID Card?</b></p>	<p>14. Only displays for eligible SIs. Defaults to No. Change to Yes, if needed. IDCard must be processed directly with ID Card Center.</p>
<p><b>Complete Request</b></p>	<p>15. Ensure all required fields indicated by * are entered. Click <b>submit</b>. For detailed information, access Sponsored Identity page on ITS website and view "<a href="#">What you need to know about Sponsored Identities</a>".</p>

## 2. How to Guide for Sponsored Identity

Yale

<h3>How to Modify, Activate or Deactivate an SI</h3>	<p><b>Select Manage SI</b></p> <ul style="list-style-type: none"> <li>Select <b>Actions</b> to:</li> <li><b>Modify:</b> Change <b>Start or End Dates</b> and other information. <b>Gender, Date of Birth</b> and <b>Social Security Number</b> can only be viewed and changed by the SI administrator. Contact <a href="mailto:helpdesk@yale.edu">helpdesk@yale.edu</a> for assistance.</li> <li><b>Activate:</b> Reactivate a deactivated SI.</li> <li><b>Deactivate:</b> Inactivate a current SI record.</li> <li>Select <b>Submit</b>.</li> </ul>
<h3>Avoiding Duplicate Identities</h3>	<ul style="list-style-type: none"> <li>If an individual has been at Yale before and has a NetID please make sure to: <ul style="list-style-type: none"> <li>Ensure that they do not already have an active Workday record—if you try to create a New SI it will be rejected.</li> <li>Ensure they do not have an active or inactive SI record already—if you try to create a NEW SI it will be rejected.</li> <li>If an inactive record exists in SI, reactivate it.</li> <li>If no previous SI record exists, make sure that you use the same spelling of first and last name, Date of Birth and SS# associated with their original record and NetID.</li> </ul> </li> </ul>
<h3>What to do after SI is approved</h3>	<ul style="list-style-type: none"> <li>Request PIN by forwarding SI completion email to <a href="mailto:helpdesk@yale.edu">helpdesk@yale.edu</a>.</li> <li>If ID Card is required, forward SI completion email, with applicable charging instructions to IDCenter.</li> <li>If email is needed, please process via START.</li> <li>IF VPN access is needed, follow VPN Exception process accessed here, <a href="http://its.yale.edu/forms-policies/forms/vpn-access-request-form">http://its.yale.edu/forms-policies/forms/vpn-access-request-form</a></li> </ul>
<h3>How to Search within Sponsored Identity</h3>	<p>To search for an individual by Name, enter <b>First and Last Name</b>. To get a list of all SIs in your dept. select <b>Sponsoring Department</b> by entering Supervisory Org dept. number, or name of Strategic Business Partner/Business Partner. Use <b>Enter</b> on keyboard, scroll down page to select from red highlighted options.</p>
<p>Cancel</p> <p>Clear</p> <p>Save</p> <p>Submit</p>	<ul style="list-style-type: none"> <li><b>Cancels</b> the request.</li> <li><b>Clears</b> all entered fields.</li> <li><b>Saves</b> entered fields for 30 days. Update via links to <b>Saved Requests</b>. Use <b>Save</b> if you need to validate information such as the dummy SSN.</li> <li><b>Submit</b> validates entry of required fields and submits request for approval</li> </ul>
<h3>How to Use Calendar</h3>	<p>Must select year first, then month and day. To access years, select <b>Calendar</b> icon. Click on <b>Month/Year</b>. Double click on <b>Year</b>. Use arrows to work through decades. Select <b>year, month and day</b>. If date change is needed, use the calendar icon to make the change.</p>