Using the Account Request Form (ARF)
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Overview: What is the Account Request Form?

The Account Request Form is used to request Medical Center network and application accounts, including UCare, Email, Flowcast, and Picis.

The form allows submitters to request new or additional accounts, reactivate accounts, modify or extend accounts, and disable, terminate, or transfer accounts.

Paper vs. online
Most current UCSF employees are probably familiar with the paper-based version of the form, which required a manager’s signature and had to be faxed to IT Access Control. The online version of the form has replaced the paper-based version, which is no longer being accepted.

In addition to eliminating the need for paper and faxes, the online form simplifies the request process, reduces processing time, and increases accuracy. It also introduces several new features, including:

- **Role/job-based account provisioning.** Select the UCare or the APeX application in order to select the ‘role/template’ (such as “Nursing – Clinic Nurse” or “Ambulatory EpicCare – Lab Technician”) from the menu options.

  The appropriate applications are automatically selected for you based on the ‘role/template’ you just selected.

  The list of selected applications may be modified if you require additional application access. (Role-based provisioning is currently only available for clinical roles; financial roles and other departmental roles will be added later.)

- **Automated email notifications.** When the request is submitted, an email notification is sent to the requestor and approver.

- **Managers may approve requests online.** The email notification sent to the approver allows them to review the request, and either approve or deny it. This eliminates the need for hardcopy signatures.

- **Bulk request submissions.** Three or more account requests submitted simultaneously for the same “role/template” are considered bulk requests. In these cases, you will be able to submit one online form and upload a spreadsheet with the other pertinent information to the IT Access Control group.
How to use the form

Bring up the form in your web browser by going to http://accountrequestform. Note that this URL will only work when connected to the UCSF Medical Center Intranet.

If you are not on the Medical Center Intranet, please use the URL http://accountrequestform.ucsfmedicalcenter.org. You will be prompted to log in using your full domain\username (such as “campus\jfrias” or “som\quirkm”) and network password.

For compliance and auditing purposes, you must be logged into the computer as yourself when you complete the Account Request Form. Be sure to double-check the name displayed at the top of the Account Request Form screen. If the name displayed is not yours, log off of Windows (Start Menu > Log Off), then log back on with your own username and password.

Once you are logged in and see your name at the top of the form, complete the form section-by-section, following the instructions provided below. You may also get help by clicking the blue question mark symbol (?) that accompanies each section. When you click the blue question mark symbol, additional information about that section will be revealed. To hide the information, click the question mark symbol again.

Note: Form items marked with an asterisk (*) are required.
Section 1: Request Type

Using the drop-down menu, select the **type of request** you are making.

- **New Account**: Select this option for a new employee who **does not have any accounts** with UCSF Medical Center. If the employee already has an account but needs access to a new application, select the option “Modify Existing Account.”

- **Reactivate Account**: Select this option for former employee or temporary employee who needs to reactivate their expired or disabled account.

- **Extend Account**: Select this option for a temporary employee who needs to push back their account expiration date. (Maximum one year.)

- **Disable Existing Account**: Select this option to disable an employee’s account. This includes temporary employees, students, volunteers, vendors, contractors, others and career employees who no longer needs access to one or more Medical Center applications.

- **Modify Existing Account**: Select this option to modify an employee’s current account, such as changing access permissions or demographic changes in certain applications.

- **Terminate Employee/User**: Select this option for a UCSF Medical Center employee or temporary employee who is no longer employed at UCSF Medical Center (Retired, Resigned, Laid off).

- **Transfer Employee/User**: Select this option for a UCSF Medical Center employee who needs to update or change their account information due to a departmental transfer or transfer to Campus.
Section 2: Account Information

Employment Status

Using the drop-down menu, select the employee’s employment status.

- **Regular UCSF Employee**: Select this option for a person who has been hired by UCSF.
- **Students**: Select this option for a student or intern.
- **Volunteers**: Select this option for a volunteer.
- **Temporary Employee / Contractor**: Select this option for a person who has been hired as a temporary employee or contractor. This includes employees from staffing agencies such as Zero Chaos and Prolucent.
- **Vendor**: Select this option for a person who provides a specific service for UCSF on behalf of a vendor contracted by UCSF.
- **Other**: Select this option if the person has been hired by UCSF but does NOT fit into the previous categories: regular UCSF employee, student, volunteer, temporary employee, contractor or vendor.
UCSF ID Number

Once you have selected the correct employment status, enter the employee’s nine-digit UCSF ID Number into the “UCSF ID number” field. UCSF ID numbers always begin with “02” (02xxxxxxx).

Click the Search button to auto-populate the employee’s information fields. Double-check to ensure all fields contain accurate information.

Non-Techie Talk: What does auto-populate mean?

**Auto-populate** means the system automatically finds information and enters it into the form for you. This works by looking up the UCSF ID number in the UCSF database of employees, much like using the Yellow Pages phone book.

If the number is found in the database, the rest of employee’s information, such as address and department, is sent to the form automatically.

If you enter an invalid UCSF ID, or if the employee is new and has not had their information completely entered into the system yet, you may see the error message “No Employee with this ID found in Directory.”

A UCSF ID is required for all UCSF Employees, Students, Volunteers, Temporary Employees, Contractors, Vendors, etc.
Access Start Date

If you enter a Request Type of New Account, Reactivate Account, Extend Account, Transfer Employee/User, or Additional Account/Access, you will be asked to enter an Access Start Date. To enter a date, click on the calendar icon, and then click on the calendar to select the appropriate month and day. Use the ≤ and ≥ symbols at the top of the calendar to move from month to month. This is a required field.

Access Expiration Date

If you enter an Employment Status type other than “Regular UCSF Employee,” you will be asked to enter an Access Expiration Date. To enter a date, click on the calendar icon, and then click on the calendar to select the appropriate month and day. Use the ≤ and ≥ symbols at the top of the calendar to move from month to month.

Company Information

The Company Information section will appear for any Request type other than Terminate Employee/User or Disable Existing Account whenever you select any of the following Employment statuses: Temporary Employee/Contractor, Vendor, or Other. Fill out the information to the best of your ability. Fields marked with an asterisk (*) are required.

Employee/User Termination Date

If you selected a Request Type of Terminate Employee/User, you will need to enter a date and time the account should be terminated. To enter a date, click on the calendar icon, and then click on the calendar to select the appropriate month and day. Use the ≤ and ≥ symbols at the top of the calendar to move from month to month. To enter a time, select from the pull down menus.
Location
The Location section allows you to specify the employee’s work site location. This section uses three drop-down menus that must be used in the proper sequence. Begin by selecting the general UCSF site (such as “Mount Zion”) from the Site drop-down menu (1). After selecting the site, the Building drop-down menu will only show buildings located at the site you specified. Select the appropriate building (2), then select the floor the employee will be working on (3).

Bulk Request
If you are making a Bulk Request, select “Yes” from the pull-down menu. You will then be able to upload a spreadsheet containing the pertinent information (UCSF ID, full name, expiration date, etc.).

Now that your personal information has been entered, you are ready to request access to specific applications. Click the “Next” button to continue to the next portion of the form.
Section 3: Applications/Services

Using *role-based provisioning* to select applications

UCSF Medical Center uses many applications, and the application names and acronyms can often be confusing. In some cases, a new employee may not be sure to which applications they need to request access.

In an effort to make the application selection process easier and more accurate, the Account Request Form has been designed to use role-based provisioning. This means the form will automatically select applications based on your job type or role within UCSF Medical Center.

Instead of selecting individual applications, simply select your role/template from the “Select Role/Template” menu button. The individual applications associated with your job type or role is selected for you!
Changes to the Application / Services Screen.

The ARF displays four new application radio buttons from which you can select:

- UCare Applications
- APeX Application
- APeX and UCare Application
- Other Applications

The Please select Role/Job from list drop-down menu has been replaced by the Select Role / Template menu button.

**Role Selection Explanations:**

**UCare Applications** –
- UCare roles remain the same
- The ‘None of the Above’ option has been removed

**APeX Applications or the APeX and UCare Applications** –
- Templates can be selected for areas that have gone live with APeX

**Other Applications**
- This option replaces the ‘None of the Above’ option that was deleted
- If a Role/Template is not listed, select the Other Applications option and select from the list of available applications. For example: an ARF for an IT/Programmer Analyst or Patient Financial Services/Analyst
An additional section for APeX specific items has been added.

- Default Login Department (Primary/Home Department) – This is a required field
- Additional Departments (if you need to see In Basket pools outside of your Primary/Home Department) – This is an optional field
- In Basket pools (Select the In Basket pools needed) – This is an optional field

**Additional Information**

- APeX Templates that require a Provider ID

  This applies only when the APeX Applications or the APeX and UCare Applications options are selected.

  If the APeX Template selected is for a credentialed provider, the 5 digit Provider ID is validated in the Medical Staff Office credentialing system (ECHO). Users will be allowed to continue only with an active Provider ID. If a Provider ID is not available or inactive then the following message displays:

  The APeX Template selected requires an active Provider ID. The Provider ID has not been established or is not active at this time. Please contact your home department for more information. To continue with other applications, go back to the Applications/Services section, click the Add/Remove button, and uncheck the APeX application.

- Training is required for all APeX access

  APeX accounts are created in an ‘inactive’ status. Accounts are activated after successful completion of training.

- APeX access is limited to the areas that are currently live.

- The ARF is compatible with Internet Explorer Version 7 and higher.
Exceptions
In some cases, an employee may need to use applications that are not normally part of the profile for their particular job or role. To request the additional applications, click the "Add/Remove" button to make the application list editable, and then select the additional application(s) by clicking the checkbox next to its name. You can cancel the "add/remove" process at any time by clicking the "Reset to Role" button.

When modifying the selected applications, the application list's border turns red. Note: Applications marked with an asterisk (*) are part of the UCare system.

Applications not on the list
If an application you need access to is not listed, it may not be an application administered by the IT Access Control department. Check the Information Technology intranet site (http://it/forms/) for forms and/or instructions for accessing your application. If you can’t find what you’re looking for on the intranet site, please contact IT Customer Support at 514-4100, option 1, for guidance.
Section 4: Application Information

The fields displayed in Section 4 will change depending on which applications you have selected. In general, these fields allow you to provide more specific information about your request to the IT department. This aids them when evaluating your request(s) and setting up your accounts.

For instance, if **Business Object Enterprise** is among the applications you selected in Section 3, you can specify whether you need access to Picis or SMS.

![Business Object Enterprise Information section]

If you selected **FTP Account** in Section 3, you can indicate whether access is needed for Network/Server, Flowcast Acacia, or TSO.

![FTP Account Information section]

If you selected **Med Center Email** in Section 3, select the type of user from the drop-down menu.

![Med Center Email Account Information section]

If you selected **Network (Windows/AD)** in section 3, you can specify whether or not you will:

- Need shared drive access
- Be using a wireless device
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The Network (Windows/AD) Account Information section

If you selected VPN Account in Section 3, indicate whether you have a PC or a Mac.

Complete each field to the best of your ability. Fields marked with an asterisk (*) are required. If you aren’t sure what to write or which options to pick, please check with your supervisor or manager.

When you’ve completed all the fields in Section 4, click the “Next” button to continue.
Section 5: Requested By

Sometimes the Account Request Form is submitted on someone else’s behalf. For instance, a department’s administrative assistant may submit a request on behalf of a new employee. For compliance and auditing purposes, the Requested By fields are auto-populated with the name and information of the person currently logged into the computer.

Double-check the accuracy of the auto-populated information and edit if necessary.

<table>
<thead>
<tr>
<th>5. Requested By</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Your First Name*</td>
<td>Philip</td>
</tr>
<tr>
<td>Your Middle Name</td>
<td></td>
</tr>
<tr>
<td>Your Last Name*</td>
<td>Hutchison</td>
</tr>
<tr>
<td>Your Title*</td>
<td>PROGRAMMER/ANALYST III</td>
</tr>
<tr>
<td>Your Department*</td>
<td>LEARNING SERVICES</td>
</tr>
<tr>
<td>Email*</td>
<td><a href="mailto:Philip.Hutchison@ucsfmedctr.org">Philip.Hutchison@ucsfmedctr.org</a></td>
</tr>
</tbody>
</table>

The “Requested By” section
Section 6: Select the Approver

Your request is almost complete. On the old paper-based form, this is where you would have asked your manager for a signature. With the online version of the form, you can get the “signature” electronically.

The “approver” is the designated signing authority (usually your supervisor, manager or director). You must specify who your designated approver is before you can continue.

The options are:

- **I will approve the request**: Select this option if you are an authorized approver submitting the request on someone else’s behalf. You **cannot** authorize requests submitted on your own behalf.
- **Select from a list of approvers**: Select this option if you are **not** an authorized approver. You will be prompted to search for your department’s authorized approver (usually your supervisor, manager, or director).
- **Suggest an approver for this request**: Select this option if you cannot find your approver in the list of approvers. This allows you to perform a search for the person you believe should be your approver.

**Option 1: I will approve the request**

If you are a manager submitting the request on behalf of someone else, you may select the first option, labeled “I will approve the request.” As previously stated, you cannot approve requests submitted on your own behalf (the person receiving access cannot be the same as the approver).

If you are **not** a manager or a person designated as an approver, the first option will be grayed out and unavailable.

**Option 2: Select from a list of approvers**

Most non-managers will choose the second option, labeled “Select from a list of approvers.” When you click on the “Select from a list of approvers” radio button, a search box will appear.
Using the Account Request Form

6. Select The Approver

- I will approve the request
- Select from a list of approvers
- Suggest an approver for this request

Search by either first or last name:  

A search box appears after clicking “Select from a list of approvers”

Type your approver’s **last name** then click the “Search” button. You may also type their first name, but beware that common nicknames such as “Randy” in place of “Randall” or partial names such as “Phil” in place of “Philip” may not be recognized.

If the person you searched for is in the approvers list, their name will be displayed underneath the search box.

**Note:** You may have more than one search result when searching for common names. Be sure to click the correct person’s name!

A sample search result

Click the person’s name to select them as your approver. Their contact information will be displayed on the screen.

If you decide you would like to choose someone else as an approver, click the “Edit” button and search for the new approver’s name using the same steps.
Option 3: Suggest an approver for this request

If you tried option 2 ("Select from a list of approvers") and couldn't find your approver, that person may not be in the list of approvers yet. Do not worry; you can let IT Access Control know that the person should be added!

To suggest an approver, click the radio button labeled “Suggest an approver for this request.” You will see a search box just like the last one. Search for your approver and select their name using the same steps as option 2. When the form is submitted, IT Access Control will confirm whether or not the approver you suggested has appropriate authority for approving your request.

Once you have selected your approver, click the “Review Request” button to continue.

Note: If you are a director or manager and would like to designate someone as an approver, you may submit a request via Online Customer Support at http://help.ucsf.edu.

Click the Review Request button to continue.
Section 7: Review request screen

Now that you have completed the form, take a moment to review the information you entered. If you need to edit any particular section, click the “Edit” button for that section.

![ARF - Account Request Form](image)

Due to the influx of New House Staff during the months of May thru August, your request may take longer than normal to be serviced/completed.

Your request has NOT been submitted until you review and click on the submit button at the end of this page.

1. Request Type

   Request Type
   - New Account

2. Account Information For

   Employment Status
   - Regular UCSF Employee

   Personal Information
   - Legal First Name: Jane
   - Legal Last Name: Doe
   - Department: Information Technology

   Access Start Date
   - Start Date: 06/30/2008

   Location (ex: your current work site)
   - Select a Site: MOUNT ZION
   - Select a Building: 2330 POST ST - MZ MOB I
   - Select a Floor: 

Note that if you selected a Request Type of Terminate Employee/User, you must confirm that you wish to terminate access by checking the appropriate box before submitting your request.

Yes, I want to terminate access for Randall Jones

Submit Request
If all of the information is correct, click the “Submit Request” button at the bottom of the page. That’s it, you’re done!

The last step for submitting a request

What is next?

After submitting your request, you will receive an automated email confirming IT Access Control’s receipt of your request. It does not require you to respond or perform any actions. The email will include a link to your request. If you need to edit your request you may do so by clicking on this link. You may edit a request directly at any point up until it has been approved. Once the request has been approved, you must contact IT Access Control in order to make changes to the request.

After IT Access Control confirms that your suggested approver has authority to grant access, the approver will receive an automated email from IT Access Control that lets them either grant or deny your request. Note that if you are a manager submitting the request on behalf of someone else, you will approve the request directly in the form instead of receiving an automated email notice to approve or deny the request.

After the approver makes their choice, you will receive another automated email notification informing you whether the approver has granted or denied your request.