Quick Guide —

Online Account Request Form

Subject: IMS Account Request Tools
Intent: Instructions for filling out the Online Account Request form

Overview

The Identity Management System (IMS) Account Request module enables UPMC managers to submit online user account requests to the Information Security Group for specific UPMC computer applications. The IMS Account Request module consists of a series of web-based forms; it replaces the process of filling out an MS Word-based form and submitting it as an email attachment. Some applications are also automatically created.

With the online Account Request Form utility, you can request to:

- create a new application account for a specific person
- change data in an existing application account
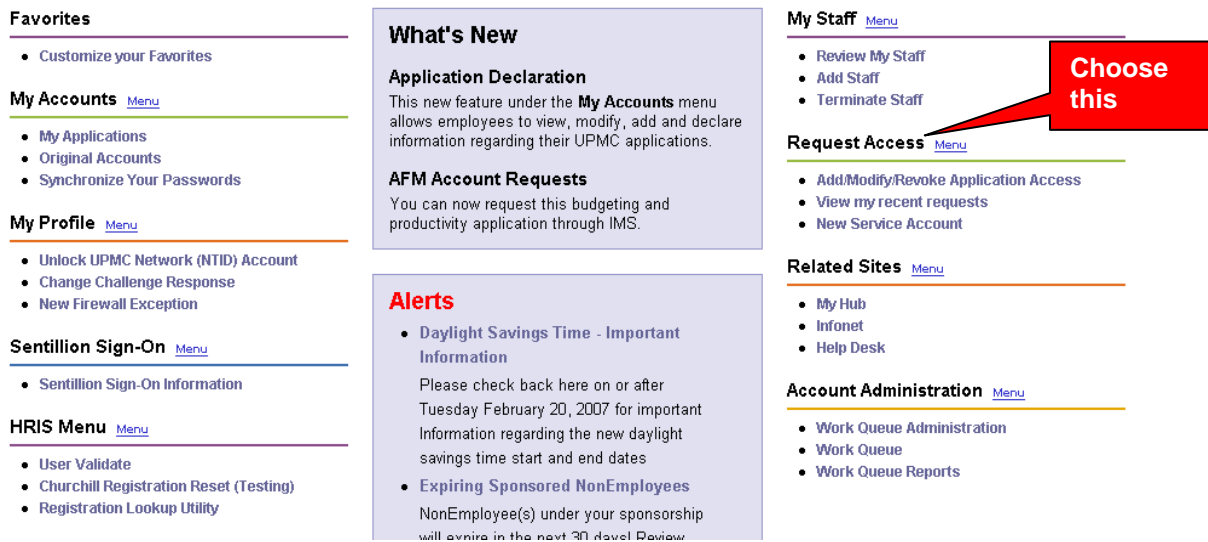- revoke an existing application account

To use the online Account Request form, you must log on to IMS and perform the following steps:

1. Start the utility
2. Identify the user for whom the request is being made
3. Set the date when the account(s) will be needed
4. Select the computer applications
5. Fill out specific information for each selected application
6. Review the form, identify additional email notification, and submit

Once all of these steps are successfully performed, IMS submits the account requests to the appropriate recipients. IMS submits a confirmation email to the requestor stating that the request is being processed.

![IMS - Identity Management & Account Administration]

Quick Guide – Online Account Request Form

Step 1: Start the Utility

Go to the IMS web site (https://ims.upmc.com) and log on using your E-Sign-On account ID and password. One of the IMS menus is displayed. The menu you see will either be the "My IMS" portal page, or one of the IMS function menus.

Favorites
- Customize your Favorites

My Accounts Menu
- My Applications
- Original Accounts
- Synchronize Your Passwords

My Profile Menu
- Unlock UPMC Network (NTID) Account
- Change Challenge Response
- New Firewall Exception

Sentillion Sign-On Menu
- Sentillion Sign-On Information

HRIS Menu Menu
- User Validate
- Churchill Registration Reset (Testing)
- Registration Lookup Utility

What's New

Application Declaration
This new feature under the **My Accounts** menu allows employees to view, modify, add and declare information regarding their UPMC applications.

AFM Account Requests
You can now request this budgeting and productivity application through IMS.

Alerts
- **Daylight Savings Time - Important Information**
  Please check back here on or after Tuesday February 20, 2007 for important Information regarding the new daylight savings time start and end dates
- **Expiring Sponsored NonEmployees**
  NonEmployee(s) under your sponsorship will expire in the next 30 days! Review

My Staff Menu
- Review My Staff
- Add Staff
- Terminate Staff

Choose this

Request Access Menu
- Add/Modify/Revoke Application Access
- View my recent requests
- New Service Account

Related Sites Menu
- My Hub
- Infonet
- Help Desk

Account Administration Menu
- Work Queue Administration
- Work Queue
- Work Queue Reports

If you do not see the Request Access Menu, you may not have access privileges to it. Only UPMC managers or their authorized delegates can complete some online account request forms and access associated utilities.

If you are not a manager but still hold the responsibility for computer user accounts, your manager must delegate his or her authority to request a computer user account by running the Delegate utility. For more information, see the IMS Help document, "Quick Guide – Delegate Access to Request Access Menu".

IMS displays the Request Access Menu as follows:

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IMS
Identity Management &
Account Administration

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My Menus

- **Account Administration**
- **Application Maintenance Menu**
- **Compliance**
- **Firewall Except**
- **Help Desk**
- **HRIS Menu**
- **IMS Administration**
- **ISD Information Security**
- **Morning Reports**
- **My Accounts**
- **My Profile**
- **My Profile**
- **My Staff**
- **Projects**
- **Related Sites**
- **Request Access**
- **Security**
- **Sentillion Sign-On**

Request Access (formerly Application Request Menu)

1 **Add/Modify/Revoke Application Access**
   Request the addition of a new account or to modify/revoke an existing account for employees and sponsored non-employees that have a UPMC E-Sign-On.

Choose this

2 **View my recent requests**
   Look up the status of your account requests.

3 **New Service Account**
   Request a service account for system access to the UPMC network, shared folders, department calendars and mailboxes.

4 **Modify Identity**
   Any user that already has an identity established and at least one UPMC E-Sign-On(ESO) account, use this option to modify your identity.

5 **New E-Sign-On**
   Create an ESO for an employee or sponsored non-employee. The ESO provides access to IMS, My HUB and other administrative systems.

6 **Physical-Security Access for ISD Locations**
   Enable or modify physical access for a badge that will provide access to select locations.

7 **Modify Service Account**
   Modify a service account for the UPMC Network, shared folders, department calendars or mailboxes.

In the Request Access Menu, choose **Add/Modify/Revoke Application Access**.

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IMS displays the following form:

Add/Modify/Revoke Application Account Access

First, you must verify that the user has an E-Sign-On. Enter the last name of the person. Enter more information only if you want to narrow your search results.

UPMC E-Sign-On Search

Last Name:	
First Name:	
Middle Initial:	
UPMC E-Sign-On:	

☑ Include accounts retired within past 30 days   ☐ Exact Match

Show Search Results Below

Create a New E-Sign-On

You can now identify the UPMC E-Sign-On for whom you are making the account request.

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Step 2: Identify the Computer User

You must identify the E-Sign-On for whom you are making the request. Use the E-Sign-On Account Search engine to find the UPMC employee or non-employee in the IMS database.

You can search for a person just by entering that person's last name and clicking **Show Search Results Below**. You will see a list of every IMS record with the last name you typed in. Additionally, the Personnel Search engine uses wildcards, so if you type in "john" as a last name, the result list shows anyone with the last name of John, Johnson, Johnston, Johnstone, etc. You can narrow your search by typing in the person's first initial, middle initial, or first name.

Note: You can turn off the wildcard feature by unchecking the **Exact Match** checkbox before running a search.

If you know the person's E-Sign-On, you can enter it to find that person's records directly.

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Once you find the person for whom you are making the account request, select that person's E-Sign-On account link.

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IMS displays the following form:

Add, Modify, Revoke Account Access

Account User Information

Personnel Information

Name (LN, FN MI):	Sandwich, BB Q
Manager's Email:	imstestmailbox@upmc.ed

List applications by location: Preferred Applications

User Account Request

Accounts

Date Account(s) Needed: 4 / 10 / 2007 (mm/dd/yyyy format)

Existing User Accounts: Network

Network	No Change	Email	No Change
Cerner	No Change	MARS	No Change
Medipac	No Change	Stentor	No Change
A.P. Imaging	No Change	AASM	No Change
Abacus	No Change	AccessAnyware	No Change
Achieve	No Change	AFM	No Change
CA-View	No Change	Canopy	No Change
CDRApplications	No Change	CHP Cerner	No Change

Please note that if you do not find the person in the IMS database, it means one of the following:

- The person is a UPMC non-employee without computer access.
- The person is a recently hired UPMC employee whose data hasn't yet been entered by Human Resources.

You can give non-employees, as well as new employees whose data hasn't yet been imported into IMS yet, computer access by manually creating an E-Sign-On account for them. See the Help document entitled "Quick Guide – Add a Non-Employee to IMS" for more information.

Step 3: Set Date

IMS displays the Account User Information section of the form at the top of the page. Review the personnel information to make sure you have selected the right E-Sign-On account.

Note: If the wrong name appears in the Personnel Information portion of the form, use your browser's Back button and select the correct E-Sign-On ID link in the search results.

Add, Modify, Revoke Account Access

Account User Information

Personnel Information	
Name (LN, FN MI):	Sandwich, BB Q
Manager's Email:	imstestmailbox@upmc.ed

List applications by location: Preferred Applications

Set date here
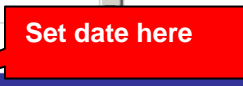
User Account Request

Accounts	
Date Account(s) Needed:	4 / 10 / 2007 (mm/dd/yyyy format)

Existing User Accounts: Network

Check to see if the manager's email and the account coordinator's email are correct; if not, enter the correct ones in the fields provided.

The "Date Account(s) Needed" fields default to today's date, and the accounts changes you request using this utility take effect as soon as possible. If you do not wish these changes to take effect until a future date, choose a new month, day, and year from the drop-down menus.

Select the user's location from the Location drop-down menu. This function will determine what applications will be displayed in Step 4. Choose **All Available Applications** to see all applications.

Scroll down to the Account Requests section of the form to select the application(s) whose account needs to be modified.

You can set certain applications as preferred by using the "Set Application Preference" link. Only those applications will be listed in the form when you choose 'preferred applications' in the drop-down box.

Step 4: Select Computer Application(s)

The Account Requests section of the form shows a list of all available applications whose accounts are administered by the Information Security Group (ISG). You must identify each application(s) involved in the request. The user's current applications will be listed at the top of the Account Requests section. If none are current, the form will read "**Existing User Accounts:** No Applications Found."

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Quick Guide – Online Account Request Form

User Account Request

Accounts

Date Account(s) Needed: 4 ▼ 10 ▼ 2007 ▼ (mm/dd/yyyy format)

Existing User Accounts: Network

Network	No Change ▼	Email	No Change ▼
Cerner	No Change ▼	MARS	No Change ▼
Medipac	No Change ▼	Stentor	No Change ▼
A.P. Imaging	No Change ▼	AASM	No Change ▼
Abacus	No Change ▼	AccessAnyware	No Change ▼
Achieve	No Change ▼	AFM	No Change ▼
CA-View	No Change ▼	Canopy	No Change ▼
CDRApplications	No Change ▼	CHP Cerner	No Change ▼
CHP DeRoyal	No Change ▼	CHP Document Imaging	No Change ▼
CHP EmStation	No Change ▼	CHP Invision	No Change ▼
CHP Logicare	No Change ▼	CHP Mars	No Change ▼
Cirius	No Change ▼	Clinician	No Change ▼
Cognos	No Change ▼	Connect@UPMC	No Change ▼
CoPathPlus	No Change ▼	E Procurement	No Change ▼
EDIT	No Change ▼	EMPI	No Change ▼
Epic / EpicCare	No Change ▼	Expedient VPN	No Change ▼ *
Focus	No Change ▼	Health Plan Paperless Initiative	No Change ▼
HealthPlanOnline	No Change ▼	HP Data Warehouse	No Change ▼
HP_JWalk	No Change ▼	Hugs Infant Security	No Change ▼
Imagecast	No Change ▼	Intelus	No Change ▼
Internet (Magee only)	No Change ▼	Invision (SMS, N2K)	No Change ▼
JROC Synergy Firewall	No Change ▼	M3LL	No Change ▼
Meditech	No Change ▼	MedTrak	No Change ▼
MISYS	No Change ▼	MR GUI	No Change ▼
Muse	No Change ▼	NeuroMeg	No Change ▼
Pcon	No Change ▼	Peoplesoft Financials	No Change ▼
PPID	No Change ▼	Psych Consult	No Change ▼
RACF	No Change ▼	Rad Dictaphone	No Change ▼
RSA Fob Replace	No Change ▼	RSA Token	No Change ▼ *
Sentillion	No Change ▼	Star Clinical Browser	No Change ▼
STAR Navigator	No Change ▼	U-Pay	No Change ▼
VMS	No Change ▼	WPIC Bedboard	No Change ▼

*Do not select 'RSA Token' when selecting other RSA applications (Canopy, Expedient VPN, MedTrak, Connect@UPMC, RSA Fob Replace)

*Expedient VPN is being Replaced by 'Connect@UPMC' and needs approval before Processing.

Proceed with Request

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Use an application's associated drop-down menu to choose one of the following request types:

- No Change – Indicates that no changes are necessary for the application. This is the default selection for each application.
- Add Account – Choose this to add a new application account for the selected E-Sign-On. This option is not available if the E-Sign-On already has an account for this application.
- Modify Account – Choose this to update the selected E-Sign-On's existing application account. Existing accounts are listed at the top of the Accounts table.
- Revoke Account – Choose this to terminate the selected E-Sign-On's application account.

Note: If an account is retired, you will only see No Change and Reactivate Account as options. Choose Reactivate Account to renew the application account for the user the account is being requested for.
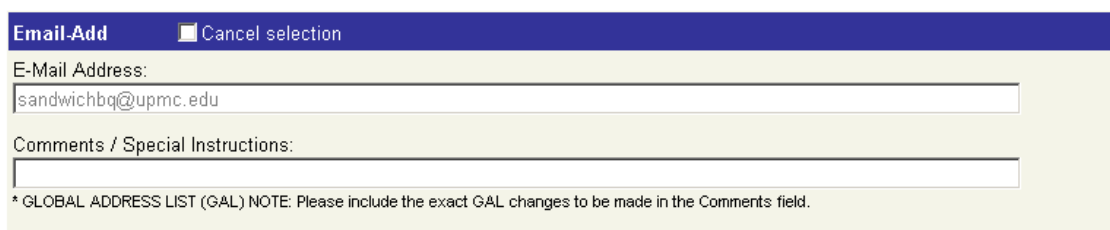
You can change the applications that appear by choosing your location from the **Location** drop-down list.

For each application involved in your request, choose the action you wish to take, and then click **Proceed with Request**.

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Step 5: Fill in Details

When you request a new account or an account modification, IMS displays the Account Request Details section of the form. For each application you selected, there will be a corresponding section on the form to fill out specific information needed to create or update the account. See Appendix A for the details required by specific applications.

Account Request Details

Email-Add	☐ Cancel selection
E-Mail Address:	
sandwichbq@upmc.edu	
Comments / Special Instructions:	
* GLOBAL ADDRESS LIST (GAL) NOTE: Please include the exact GAL changes to be made in the Comments field.	

Most details tables contain a "Comments / Special Instructions" field. Use this field to enter a detailed description of any changes. If your request must be handled by a person, entering enough information here will answer any questions the person may have, and prevent delays while that person contacts you for more information.

Modify Account Details Functionality

When you request to modify an E-Sign-On's application account, you will update information that was previously submitted when the account was created. IMS handles Modify Account requests by providing a set of radio buttons for *each* data field associated with the specific application on the IMS Modify Account Details section of the form. Instead of filling out the entire Account Details section, you only have to fill out the specific data fields that need to be updated.
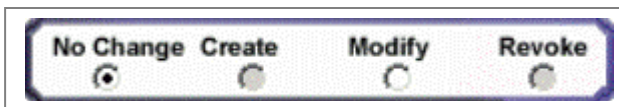
The default selection for this set of radio buttons is "No Change". For most data fields in the Account Details section of the form, IMS will only let you replace an existing setting, which is indicated by inactive "Create" and "Revoke" radio buttons.

Certain data fields allow you to choose more than one item, such as access requirements for a specific application. In cases such as these, you can select the "Add" radio button to add one or more access categories to the existing account. In the same way, you can select the "Revoke" button to remove one or more access categories.

Reminder: For each data item you update, choose the associated radio button first, and then provide the updated information!

After filling out the form details, click the **Proceed with Request** button.

Revoke Account Functionality

When you request an account termination, there are no account details involved.

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Step 6: Review Request, Identify email Notification, and Submit

IMS displays the following message at the top of the page:
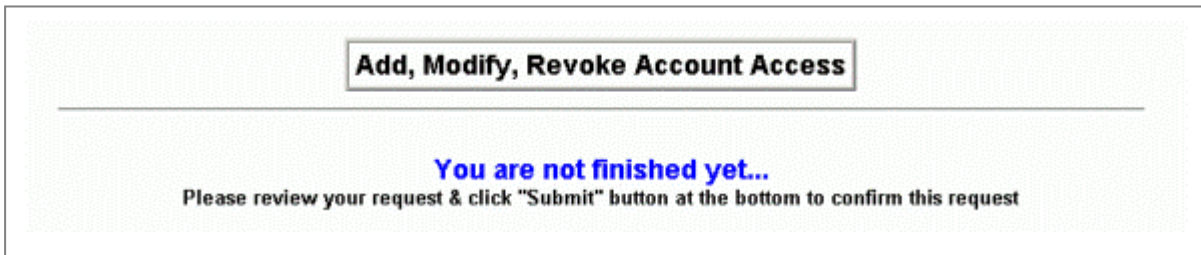
The form shows a read-only version of the information you are submitting (text appears as gray). You can review the information and make any necessary changes by clicking your browser's **Back** button.

When you are satisfied that all information is correct, you have the option of sending a copy of the request to one or more email addresses. To do this, check the checkbox, and enter an email address or semicolon-separated list of email addresses into the text entry box.

Click **Submit Request** to complete the form entry process and submit your request.

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Result: IMS Starts Processing Your Account Request

IMS displays the following message:

Email Sent to appropriate data owners for further Request Processing...

Please click Here to make another request

If page does not automatically redirect in 10 seconds, please use the link above.

IMS returns you to the Request Access Menu. If you are not automatically redirected, select the link to return to the Request Access Menu.

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Appendix A: Application Details

The following tables list the specific fields used for the Application Details section of the online Account Request form.

AP Imaging

Data Field	Description
Comments	Any additional information for the request.

AASM

Data Field	Description
Access Requirements	Description of the access required. Choose from the following: • Ambulatory Application Security MGMT • BMT Application • CISI Billing • CT Transplant • EEG Production • GI Motility • Marathon Volunteers • MED Teams • New Bureau Placements • Perfusion • PIMS – Fellow • PIMS – Inquiry • PIMS – Physician • PIMS - Technician • Progress • TBT • Toxicology • TV PHONE Production Note: You can select multiple Access categories by holding down the CTRL button when clicking on a selection.

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Comments	Any additional information for the request.

Abacus

Data Field	Description
Model account after physician or non-physician?	Select one based on computer user
Model Person	Enter name of person whose account you want to use as a model for setting up this account.
Access Requirements	Description of the access required. Choose from the following: • Find Data (Default) • Add Data • Update Data
Request A Level Security	Check the checkbox if appropriate
Comments	Any additional information for the request.

AccessAnyware

Data Field	Description
NT User Name (LN, FN, MI)	IMS auto-populates this field
Name	IMS auto-populates this field
Hospital	Use the corresponding drop-down list to choose one of the following: • Magee-Women's Hospital • UPMC Presbyterian • UPMC South Side • UPMC Shadyside

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Department	Enter name of department
Clinician Specialty	Enter the user's Clinician Specialty
Office Address, City, State, Zip, Phone, Pager Number, In-House Pager Number	Enter office address, city, state, ZIP code, and telephone. Pager numbers are not required.
User Access	Description of the access required. Use the corresponding drop-down list to choose one of the following: • Clinician (Completion, Viewing and Printing of Records) • General Use (Viewing and Printing Records Only) • HIM Staff Only
Comments	Any additional information for the request.

Achieve

Data Field	Description
Facility	Check the checkboxes next to the facilities where the user will be working.
Role	Use the corresponding drop-down list to choose the user's role.
Comments	Any additional information for the request.

CA-View

Data Field	Description
Model ID	• Enter name of person whose account you want to use as a model for setting up this account

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	•
Comments	Any additional information for the request

Canopy

Data Field	Description
Pager Type	Use the radio buttons to choose one of the following: • Alphanumeric • Numeric
Long Range Pager Number	Enter the long range pager number.
User Role	Use the drop-down list to select the user's role.
Department Manager Name	Enter department manager's name.
Department Manager Phone	Enter department manager's telephone number.
RSA Account Name	IMS auto-populates this field.
Charged Cost Center	IMS auto-populates this field.
Comments	Any additional information for the request.

Cerner

Data Field	Description
User Name	This field is auto-populated by IMS.
Model user after	Enter person's name whose account you wish to use as a model for the requested computer user account.
Build new user	Choose the Locations/Positions the user will be at from the drop-down list.

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	The Primary Zone is auto-populated.
	Choose the user's Title/Position from the drop-down list.
Override Default Secondary Zone – Title/Position	Check to override if necessary. If checked, choose the Title/Position for the Secondary Zone and Tertiary Zone.
Comments	Any additional information for the request.

CDRApplications

Data Field	Description
CDR Applications	• Check the checkbox for the applications needed • Active Problem Log • Genetics Info System • Patient Abstractor • PharmacyKnowledgebase • Womancare • Other (specify in comments) •
Comments	Any additional information for the request

CHP DeRoyal

Data Field	Description
CHP DeRoyal Username	IMS auto-populates this field
Roles	Select the Roles required
Comments	Any additional information for the request

CHP Document Imaging

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Data Field	Description
Roles	Select the Roles required
Comments	Any additional information for the request

CHP EmStation

Data Field	Description
Roles	Select the Roles required
Comments	Any additional information for the request

CHP Logicare

Data Field	Description
CHP Logicare Username	IMS auto-populates this field.
Roles	Select the Roles required
Comments	Any additional information for the request

Cirius

Data Field	Description
Cirius Account Name (NT Logon)	• IMS auto-populates this field •
Department Name	• Enter user's department name
Supervisor Name	• Enter user's supervisor's name
Reason for Request	• Enter the reason for the request
Comments	Any additional information for the request

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Clinician

Data Field	Description
Comments	Any additional information for the request.

Cognos

Data Field	Description
Model account after	Enter person's name whose account you wish to use as a model for the requested computer user account.
List all reports/folders that the user will require access to	Enter all reports/folders
Database Access (ex: CDB, EPIC, MRS, Canopy, etc)	Enter the names of the databases the user requires access to
Cognos Connection Access	Choose the connection access needed from the drop-down menu: Author, Consumer, Reviewer
Additional Cognos Tools	Check the checkbox next to the tools required: PowerPlay Cubes/Analysis Studio, Metric Manager/Metric Studio
Comments	Any additional information for the request.

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Connect@UPMC

Data Field	Description
Remote Connectivity Trust Agreement	Check the check box if the user has read and signed the Remote Connectivity Trust agreement and a copy is on file. Select an Account Liability level.
Home Address	Enter street address, city, state, and ZIP code. Telephone numbers are not required. The Attention field is mandatory and needs to be filled in with who the fob is being sent to.
SecurID Token Distribution	Use the radio buttons to choose one of the following: • Pick Up At Churchill • Mail
Company	Use the radio buttons to choose one of the following: • UPMC • UPMC Health Plan • Outside Company or Vendor/On-Call Support
Last Name, First Name, Middle Initial	IMS auto-populates this field.
Connect Account Name	IMS auto-populates this field.
Email Address	The user's email address is not necessary, enter it if desired
Charged Cost Center	IMS auto-populates this field.
PC Experience	Select a level from the drop-down menu
Phone Service Provider	Select the user's Phone Service Provider

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Service Type	Use the drop-down list to choose one of the following: • Cable Modem • Corporate Network (Not UPMC) • Dial-up Connection • DSL Line • ISDN Service • Private Line (T1, T3) • Other •
Internet Service Provider	Select the user's Internet Service Provider
DSL Traveling Dial-Up	Select whether or not to add Dial-Up
Select appropriate role(s) for user	Select the appropriate role(s) if needed
Comments	Any additional information for this request.

CoPathPlus

Data Field	Description
Credentials	Choose the user's credentials from the drop-down menu: • No Credentials • CT (ASCP) • SCT (ASCP) • M.D. • M.P.H. • Ph.D. • HT (ASCP) • D.D.S. • ABMG • FACMG • MBChB • MSPH

	• MT • MT (ASCP) •
Employee	Choose the appropriate radio button. • Pathology • Non-Pathology
Pathology Position	Choose the user's pathology position from the drop-down menu: • AP Technologist • Clerical • CytoTechnologist • Fellow • HistoTechnologist • Pathologist • PA/Diener • Resident • Supervisor • Transcriptionist • Other •
Email	• IMS auto-populates this field with the user's UPMC email
UPMC Username	• IMS auto-populates this field with the user's username
Phone	• Enter the user's phone number and extension
Fax	• Enter the user's Fax number, if available
Pager	• Enter the user's Pager number, if available
In-House Page	• Enter the user's In-House Pager number, if available
Primary Office Location	Choose the user's Primary Office Location from the drop-down menu: • Children's Hospital of Pittsburgh • Harbor Gardens • Hillman Cancer Center • Magee-Womens Hospital of UPMC • Pittsburgh Cytogenics Lab

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	• Quantum Bldg • UPMC Bedford Memorial • UPMC Braddock • UPMC Cancer Pavilion • UPMC Horizon – Greenville • UPMC Horizon – Shenango Valley • UPMC Lee Regional • UPMC McKeesport • UPMC Montefiore • UPMC Passavant • UPMC Cranberry • UPMC Presbyterian • UPMC Shadyside • UPMC South Side • UPMC St. Margaret •
Office Room Number	Enter the user's Office Room Number
Street Address	Enter the street address
Zip Code	Enter the Zip Code
Date account needed	Select the date the account is needed from the drop-down menu
Comments	Any additional information for the request

E Procurement

Data Field	Description
HR Finance Options	Check the checkbox for the options the user needs access to: • Purchase Requisition Creation • Purchase Requisition Request Approval • Surginet Workbench •

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Shipping Address	Enter the following required information:
	Department Name
	Building
	Floor
	Room
	City
	State
	Zip Code
	Requester Phone Number & Extension
Comments	Any additional information for this request.

EMPI

Data Field	Description
Level and System Required	EPIPRD is auto-selected
	Use the drop-down list next to the Account Level you've selected to choose one of the following:
	• General
	• WPIC General
	• Data Quality
	• Technical
	• CoPath
Comments	Any additional information for the request.

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Epic/EpicCare

Data Field	Description
Employee Demographics	Enter the user's last name, first name, middle initial, job title/position, practice site name, practice site address and telephone number, site address, city, state, ZIP, telephone and fax numbers in the required fields.
User needs EpicCare access	Check the box if needed
Select a Primary Location	Use the drop-down menu to select one of the following: • Physician Services Div • Community Family Hlth • Cancer Center • St. Margaret Family Prac •
Service Area Number	Select a number from the drop-down list. • Physician Services Div • 10 – Univ of Pgh Phys • 11 – UPMC Comm Med • 27 – UPMC prof Claim Serv • Community Family Hlth • 21 – Comm Family Hlth Cntr • 23 – Eric Miller • Cancer Center • 24 – UPCI Cancer Serv • 25 – Onc Hematology Assn • St. Marg Family Prac • 26 – St Marg Fam Hlth Ctr • 25 – Ann Mcgaffey •
Service Area	Select a Service Area number from the appropriate drop-down list
Cadence Default Department	Enter the EPIC Cadence default department number.

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Access to Other Departments	Enter information about access to other departments.
Comments	Any additional information for the request.

Focus

Data Field	Description
Model Account After	Enter person's name whose account you wish to use as a model for the requested computer user account.
Comments	Any additional information for the request.

Health Plan Paperless Initiative (formerly Filenet)

Data Field	Description
Document Classes	Assign a security level (No Access, Read, Annotate, Administrative) to at least one document class.
	- Claims and Correspondence - Enrollment Medicare - Enrollment Commercial - Premium Invoices - WorkPartners - HAS - HIPA Certification Letters - HCC

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	• Pharmacy
	• Contract
	• CCBH
	• Work Partners Disability
	•
Comments	Any additional information for the request.

Health Plan Online

Data Field	Description
UPMC Network ID	This field is auto-populated by IMS.
Health Plan Online Username	This field is auto-populated by IMS.
Email	Enter the user's email address, if desired.
Phone	Enter the user's phone number and extension
Environment	Health Plan Online: Production (auto-selected), Training, Test, Integration, Quality Assurance CCBH Online: Production (auto-selected), Training, Test, Integration, Quality Assurance
Health Plan Online Production User Type	Select a User Type: • Claims Examiner • Claims Administrator • Customer Service Rep • Customer Service Rep / Pharmacy Manger • Electronic Enrollment Administrator

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	(EEAdmin)
	• Security Administrator (SECAdmin)
	• Full Administrator (FULLAdmin)
CCBH Online Production User Type	• Claims Examiner
	• Claims Administrator
	• Customer Service Rep
	• Customer Service Rep / Pharmacy Manger
	• Electronic Enrollment Administrator (EEAdmin)
	• Security Administrator (SECAdmin)
	• Full Administrator (FULLAdmin)
Comments	Any additional information for the request.

HP Data Warehouse

Data Field	Description
UPMC Network ID	This field is auto-populated by IMS.
Email	This field is auto-populated by IMS.
Data Access Role Requested	Check the role(s) requested: dwCCBH, dwOAO, EDWRPT, MEDai, ONYX/IKA, Other, Production Server Reports
(Role selected) Access Level (dwCCBH, dwOAO, EDWRPT,	Choose the access level needed for the role(s) requested:

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MEDai, ONYX/IKA)	View Reports (Include application and/or report name – e.g. Access, TOAD) Design Reports (Include application name – e.g. TOAD)
Additional Other Selections	When Other is selected you will also need to select a role from Additional Other Selections: Create Tables, Member Restricted, Other DataBase Schema
Additional Production Selections	When Production Server Reports is selected you will also need to select a role from Additional Other Selections: Actuate EDI, Actuate MA Statutory, Actuate Provider Relations, Actuate Product Development, Actuate Account Management, Actuate CCBH and MC400 Production Reports, Actuate Finance
Comments	Any additional information for the request.

Health Plan JWALK

Data Field	Description
UPMC Network ID	This field is auto-populated by IMS.
Email	Enter the user's email address if necessary
HP JWALK User ID	This field is auto-populated by IMS.
Environment	UPMC Production is auto-selected. Choose the security level required. Does user need to enter claims? Choose yes or no Choose other environments needed: UPMC Staging, UPMC Test, UPMC Conversion, UPMC Integration, UPMC Training, UPMC QA

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	Check CCBH Production. Choose the security level required.
	Does user need to enter claims? Choose yes or no
	Check any other environments needed: CCBH Staging, CCBH Test, CCBH Conversion, CCBH Integration, CCBH Training, CCBH QA
Comments	Any additional information for the request.

Hugs Infant Security

Data Field	Description
Comments	Any additional information for the request.

Imagecast

Data Field	Description
UPMC Network ID	This field is auto-populated by IMS.
UPMC Email	This field is auto-populated by IMS.
Physician ID Numbers	Check the box next to the provider needed (Medipac, MWH SMS, CHP SMS) and enter the number in the corresponding text-field.
Build a new user account	Choose Yes or No for the following questions: Defined As A Technologist? Should Have Last Signing Privileges? Can Proxy Sign For All? Authorize Others To Sign All?

	Enter the user's Interpreting Subspeciality
	Choose the Organization Where Access Is Required from the list.
	Choose the Work Area from the list
	Choose the Access Groups from the list
Comments	Any additional information for the request.

Intelus

Data Field	Description
Location	Check the checkbox for each location where the computer user resides: PUH, WPIC.
Comments	Any additional information for the request.

Internet (Magee only)

Data Field	Description
Comments	Any additional information for the request.

Invision (SMS, N2K)

Data Field	Description

Comments	Any additional information for the request.

M3LL

Data Field	Description
Model Account After	Enter person's name whose account security access levels you wish to use as a model for the requested computer user account.
Comments	Any additional information for the request.

MARS

Data Field	Description
Access Requirements	Description of the access required. Choose from the following: • Electronic Medical Records • WPIC Psych Records • HHG Psych Records • Fiscal Records • BRH Psych Records • MCH Psych Records • HHS Psych Records • SSH Psych Records
Reviewer Information	Type in the reviewer's name and email address.
Comments	Any additional information for the request.

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Medipac (Clinipac)

Data Field	Description
Model account after physician or non-physician?	Select one based on computer user
Create Own Patient List? (Physician account only)	Choose YES or NO
PROI # (Physician account only)	Professional Master Inquiry Number, used by Medipac to identify physicians in the system.
Template Name/Model Person (Non-physician account only)	Enter person's name whose account you wish to use as a model for the requested computer user account.
Additional Access Requirements	Description of additional access required for the user account. Choose from the following: • Request Cashier Sign-On • Request Abstract Coding/Update
Comments	Any additional information for the request.

Meditech

Data Field	Description
Meditech Username	Enter the user's Meditech Username
Comments	Any additional information for the request.

MISYS (Sunquest)

Data Field	Description
Model Account After	Enter person's name whose account you wish to use as a model for the requested computer user

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	account.
Location	Check the check box for each location where the computer user resides.
Job Type	Use the corresponding drop-down list to choose one of the following: • Admin • Asst Super • Clerk • Nurse • Other • Phleb • Physician • Super • Tech Note: If "Other" is selected, you must enter a job description in the provided text field.
Comments	Any additional information for the request.

MR GUI

Data Field	Description
Account Request Details	IMS auto-populates the First Name, Middle Initial, Last Name, Network ID, and Job Title fields with the user's information.
Account Type	Choose an Account Type: MR GUI, Web Mon, Both
Security Roles	Choose a Security Role: Read Only, Full Access
Comments	Any additional information for the request.

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Muse

Data Field	Description
UPMC Network ID	IMS auto-populates this field
Select Hospital Unit	Use the corresponding drop-down list to choose one of the following: • Magee-Women's Hospital • UPMC Braddock • UPMC McKeesport • UPMC Montefiore • UPMC Passavant • UPMC Presbyterian • UPMC Shadyside • UPMC St. Margaret • Western Psychiatric Institute and Clinic
Comments	Any additional information for the request.

Pcon

Data Field	Description
PCON Account Name	Enter the user's Meditech Username
Office Location	Enter the user's Office Location
Phone	Enter the user's Phone number and extension
Build a new user role	Choose the Access 1 Requested: Inquiry, Edit Choose the Access 2 Requested: Production, Test
Comments	Any additional information for the request.

PPID

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Data Field	Description
PPID Role	Use the drop-down list to choose the user's PPID role.
Comments	Any additional information for the request.

Psych Consult

Data Field	Description
Credentials	Check all that apply: BA, BSN, CAC, LCSW, Other, LSW, MA, M.Ed., RN. Enter Other credentials in the provided text-field.
Does the user need an Allscripts account?	Choose Yes or No.
Is the user Magellan Credentialed?	Choose Yes or No.
Is the user a Student?	Choose Yes or No. If Yes fill-in the Start Date, End Date, Field Instructor, and Field Instructors Phone Number fields.
Please list ALL of the clinics that the user will be working at	Enter all clinics in the four text-fields provided.
Comments	Any additional information for the request.

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STAR Navigator

Data Field	Description
Model Account After	Enter person's name whose account you wish to use as a model for the requested computer user account.
Application Code	Choose an Application Code from the drop-down list: Bedford, LEE, Northwest, UPMC (MCK, BDK, HHS)
Comments	Any additional information for the request.

Stentor

Data Field	Description
UPMC Network ID	IMS auto-populates this field.
Comments	Any additional information for the request.

RACF

Data Field	Description
TSO	Check the checkbox if access to the TSO command-line interface is required.
Model Account After	Enter person's name whose account you wish to use as a model for the requested computer user account.
Comments	Any additional information for the request.

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Rad Dictaphone

Data Field	Description
UPMC Network ID	This field is auto-populated by IMS
UPMC Email	This field is auto-populated by IMS
Physician ID Numbers	Check the box next to the provider needed (Medipac, MWH SMS, CHP SMS) and enter the number in the corresponding text-field.
	Choose the Organization Where Access Is Required from the list. Choose the Work Area from the list Choose the Role from the list
Comments	Any additional information for the request.

RSA Fob Replace

Data Field	Description
RSA Login ID	This field is auto-populated by IMS
Fob Replace Need	Choose the appropriate radio button: Broken Fob Key, Lost Fob Key, Expired Fob Key
SecurID token distribution	Choose the appropriate radio button: Pickup At Churchill, Primary Mailing Address. If second option is chosen fill in the address.
Comments	Any additional information for the request.

RSA Token

Data Field	Description

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RSA ID	IMS auto-populates this field.
Application	Use the drop-down list to choose one of the following: • Care Coordinator • Chartwell • EPCD • Medtrak • NFUSE • Other • Pharmacy Admin • Pharmacy Student • PTEU • Telepathology • Telepathology Admin • Transplant • WPPT If other is chosen, enter details in the comments field.
SecurID Token Distribution	Use the radio buttons to choose one of the following: • Pick Up At Churchill • Mail
Comments	Any additional information for the request. Comments must be entered if the application is Other.

Sentillion

Data Field	Description
Sentillion Role	Choose the appropriate role: Clinical, ED nurse, ED Physician, ED Staff, Nurse, Other Physician

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| Comments | Any additional information for the request, including whether or not the mailbox should be hidden. |

Star Clinical Browser

Data Field	Description
UPMC Network ID	This field is auto-populated by IMS.
Phone	Enter the user's Phone number and extension
Roles	Choose the appropriate role from the drop-down menu: Physician, Staff
Select a Location	Choose the user's location from the drop-down menu: Braddock, McKeesport, Northwest
Comments	Any additional information for the request, including whether or not the mailbox should be hidden.

UPMC Email (MSX)

Data Field	Description
E-Mail Address	IMS auto-populates this field.
Comments	Any additional information for the request, including whether or not the mailbox should be hidden.

UPMC Network (NT)

Data Field	Description
Network ID	IMS auto-populates this field
Attach to Organizational Unit (OU)	Select the organizational unit to attach user to

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Comments	Any additional information for the request, including any shared drives that need to be accessed by this account.

U-Pay

Data Field	Description
U-Pay Account Purpose	Use the radio buttons to choose one of the following: • Cashier User • Administrator user
Department Manager Name	Enter department manager's name.
Department Manager Phone	Enter department manager's telephone number.
User's Email	Enter user's email address
User's NTID Account Name	IMS auto-populates this field.
U-PAY Supervisor	Select Supervisor from the drop-down menu
Billing System	Select Billing System from the drop-down menu
Entity	Choose an Entity from the drop-down list
Name of Worksite(s)	Choose the Worksite(s) needed
Comments	Any additional information for the request.

VMS

Data Field	Description
Model Account After	Enter person's name whose account you wish to use as a model for the requested computer user account.

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Comments	Any additional information for the request.

WPIC Bedboard (formerly CPN)

Data Field	Description
Clinician Number	Enter the computer user's clinician number if available.
Model account after physician or non-physician?	Select one based on computer user.
Model Person	Enter name of person whose account you want to use as a model for setting up this account.
Access Requirements	Description of the access required. Choose from the following: • Find Data (Default) • Add Data • Update Data
Comments	Any additional information for the request.

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Subtitle:

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Audience: UPMC Employees

Intent: Instructions for using the online Account Request form

Related Documents:

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