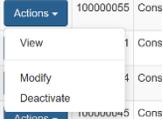


# 1. How to request a Sponsored Identity

<p><b>Login</b> Enter <a href="https://sgi.its.yale.edu/sponsoredidentity/">https://sgi.its.yale.edu/sponsoredidentity/</a> in web browser. Enter <b>NetID/Password</b> Click <b>Login</b></p>	
<p><b>Sponsored Identity Type</b></p>	<p>Select <b>Sponsored Identity</b> type from drop-down. Refer to the <a href="#">Sponsored Identity Procedure</a> for definitions of each SI Type. <b>Note:</b> Student Spouse requests must be processed through central or departmental Registrars.</p>
<p><b>Start and End Dates</b></p>	<p>Enter duration using calendar. Select year first, followed by month and day. Durations are preset. <i>(See page 2 for details on how to use calendar).</i></p>
<p><b>Vendor/Supplier Name &amp; Number</b></p>	<p>For Contractors, Consultants and Vendors enter the Vendor/Supplier Name and number.</p>
<p><b>First* and Last* Name</b></p>	<p>Enter First and Last Name with the individual's legal name. ID Card cannot be issued if name in system does not match identifying documents.</p>
<p><b>Address Phone and Email</b></p>	<p>A US Address is required, if unavailable use Sponsoring Department address. Phone/email not required.</p>
<p><b>Date of Birth *</b></p>	<p>Field is validated. Use calendar to select year, month and day. <i>(See page 2 for details on how to use calendar).</i></p>
<p><b>Business Reason*</b></p>	<p>Provide brief details on reason for request to inform approver.</p>
<p><b>Sponsor Department</b></p>	<p>a) Select <b>Sponsoring Department</b> by entering Supervisory Org (SO) number if known or search by number, name of individual or department. If you see "Yale University – SO" on your request, you have chosen the wrong one and your request will be rejected. b) Select enter on keyboard, scroll down page to select from red highlighted options. c) Place checkmark in selection, page down &amp; click Apply Changes.</p>
<p><b>Sponsor Name Search</b></p>	<p>Sponsor is not required. A Sponsor is a Yale employee that should be linked to SI records. <b>Sponsor Name and Title</b> default if Sponsor Name is entered. <i>(see additional details in document referenced at page end).</i></p>
<p><b>Additional Information</b></p>	<p>Not required, use if needed.</p>
<p><b>Do you want to display in Directory?</b></p>	<p>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 and for the email to appear as firstname.lastname@yale.edu.</p>
<p><b>Do you want to issue an ID Card?</b></p>	<p>Only displays for eligible SIs. Defaults to No. Change to Yes, if needed. ID Card must be processed directly with ID Card Center.</p>
<p><b>Complete Request</b></p>	<p>Ensure all required fields indicated by * are entered. Click submit. For detailed information, access <a href="#">Sponsored Identity Webpage</a>.</p>

## 2. How to Guide for Sponsored Identity

<p><b>How to Modify, Activate or Deactivate an SI</b></p> 	<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>Sponsoring Department</b> and <b>Date of Birth</b> can only be viewed and changed by the SI administrator. Contact helpdesk.yale.edu 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>
<p><b>Avoiding Duplicate Identities</b></p>	<p>If an individual has been at Yale before and has a NetID, please make sure to:</p> <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 and Date of Birth associated with their original record and NetID.</li> </ul>
<p><b>What to do after SI is approved</b></p>	<ul style="list-style-type: none"> <li>• Request PIN by entering request through the <a href="#">Yale ITS Service Portal</a></li> <li>• If ID Card is required, forward SI confirmation email, with applicable charging instructions to ID Center.</li> <li>• If email is needed, enter request through the <a href="#">Yale ITS Service Portal</a>.</li> <li>• IF VPN access is needed, follow VPN process accessed here, <a href="http://its.yale.edu/vpn-exception-request">http://its.yale.edu/vpn-exception-request</a></li> <li>• Note: Student Spouse are auto approved once inputted by Registrar's Office.</li> </ul>
<p><b>How to Search within Sponsored Identity</b></p>	<p>To search for an individual by Name, enter <b>First</b> and <b>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> 
	<ul style="list-style-type: none"> <li>• <b>Cancel</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>.</li> <li>• <b>Submit</b> validates entry of required fields and submits request for approval</li> </ul>
<p><b>How to Use Calendar</b></p>	<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>
<p><b>How to logout</b></p>	<p>Click on X arrow in upper right hand corner of your browser.</p>