ColumbiaDoctors and Service Corp – Requests for Epic Training and Access

Revision Date: 09/04/2020

The following document describes the process by which Columbia University faculty and staff, and Service Corp staff, have Epic access requested for them, a learning management system account created, training assigned, and ultimately gain access to the Epic electronic medical record system. This replaces any former process and must be adhered to for expedited access to required systems.

Step One: Submit an eSAF with NYP

Follow Columbia's process to submit an eSAF request:

Note: If a request is for 10 or more users, a multi-user submission template (Excel spreadsheet) can be submitted in a single eSAF request. If you need a copy of this template, contact ColumbiaCWIDSupport@nyp.org.

1. The HR Manager/Department Admin accesses the eSAF system at https://nypres.service-now.com/nyp-portal/
2. Select **Request System Access**
3. Under Categories, select **IT Services** > **Account Management**
   If a user does not see this option, they should contact ColumbiaCWIDSupport@nyp.org
4. Select **Windows Domain Login**
   If a user does not see this option, they should contact ColumbiaCWIDSupport@nyp.org
5. Use the following field values:
   - Employee Status: New (Doesn't have NYP CWID or NYP CWID is Inactive)
   - Employee Type: Other
   - Organization: Columbia
   - Manager: Please specify the individual responsible for managing the user's Epic training
     If the manager cannot be found, please contact ColumbiaCWIDSupport@nyp.org
6. Select **Add to Cart**
7. Select the **Cart** button on the top right corner of the page and select **Checkout**
8. Select **Proceed to Checkout**
9. Include the note **"User requires access to Saba for Epic training"**
10. If this is a bulk request (multi-user):
    - Select the **Paperclip** and attach the completed bulk template
    - Select **+(Optional)** under Special Instructions information and **specify "Bulk Request – Please see attachment"**
11. If the user already has a UNI:
    - Click **+(Optional)** under Special Instructions information and **specify "User has a UNI:" and include their UNI**
12. Select **Checkout**

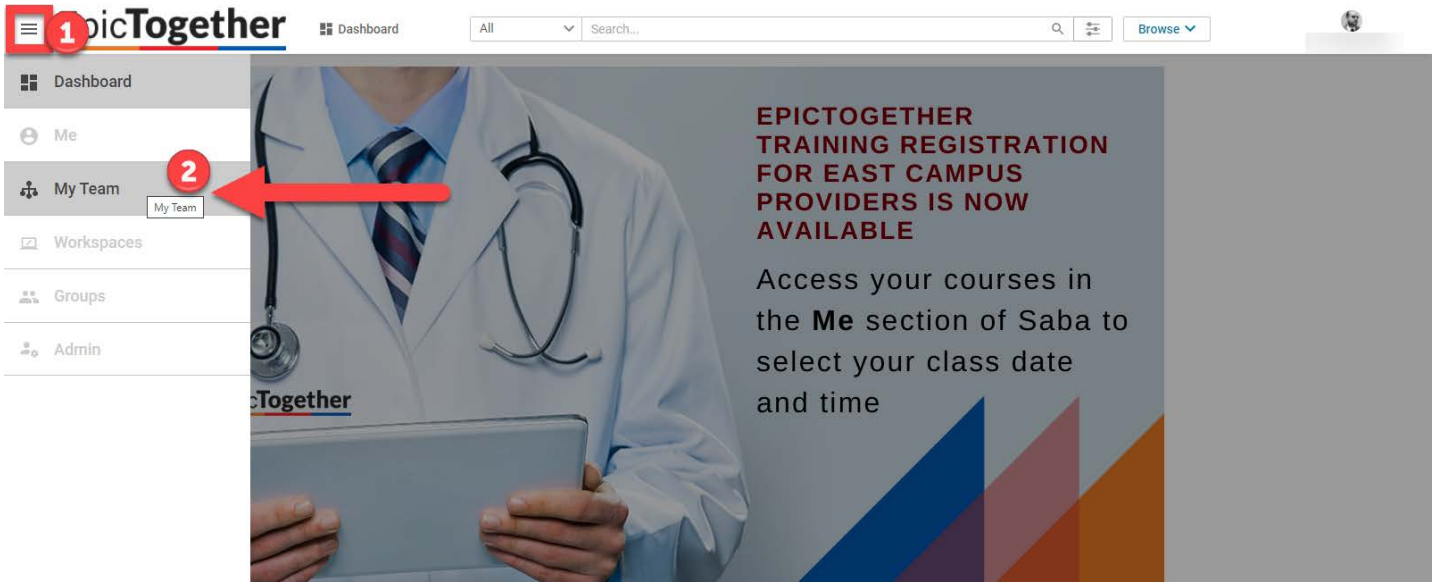
Step Two: NewYork-Presbyterian Processes the eSAF Request

1. Once the new account is created, the CWID and password will be put into the ServiceNow ticket
2. An email will be automatically sent to the eSAF submitter with the CWID and password
3. Once the user is added to Saba (the NYP Learning Center), the manager from the eSAF will be added as the manager of the individual in Saba, this provides the ability to enroll the individual in training and monitor their completion of it

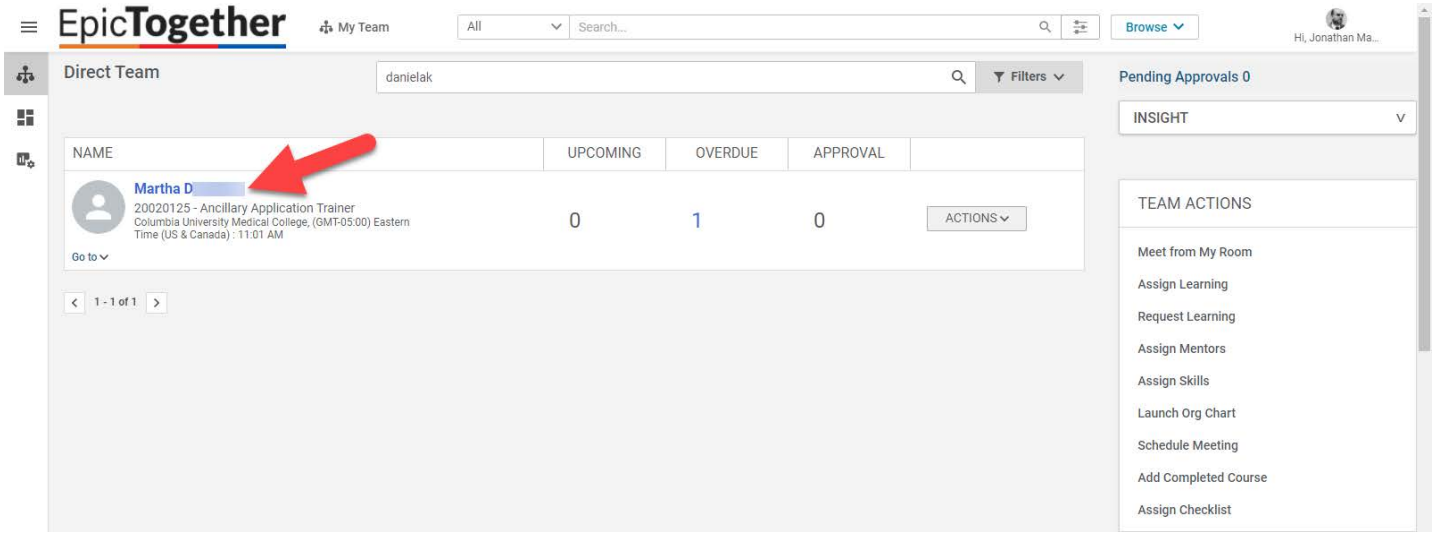
Step Three: Epic Training Enrollment for Faculty and Staff

Option 1: Manager Enrolls Faculty/Staff in Epic Training

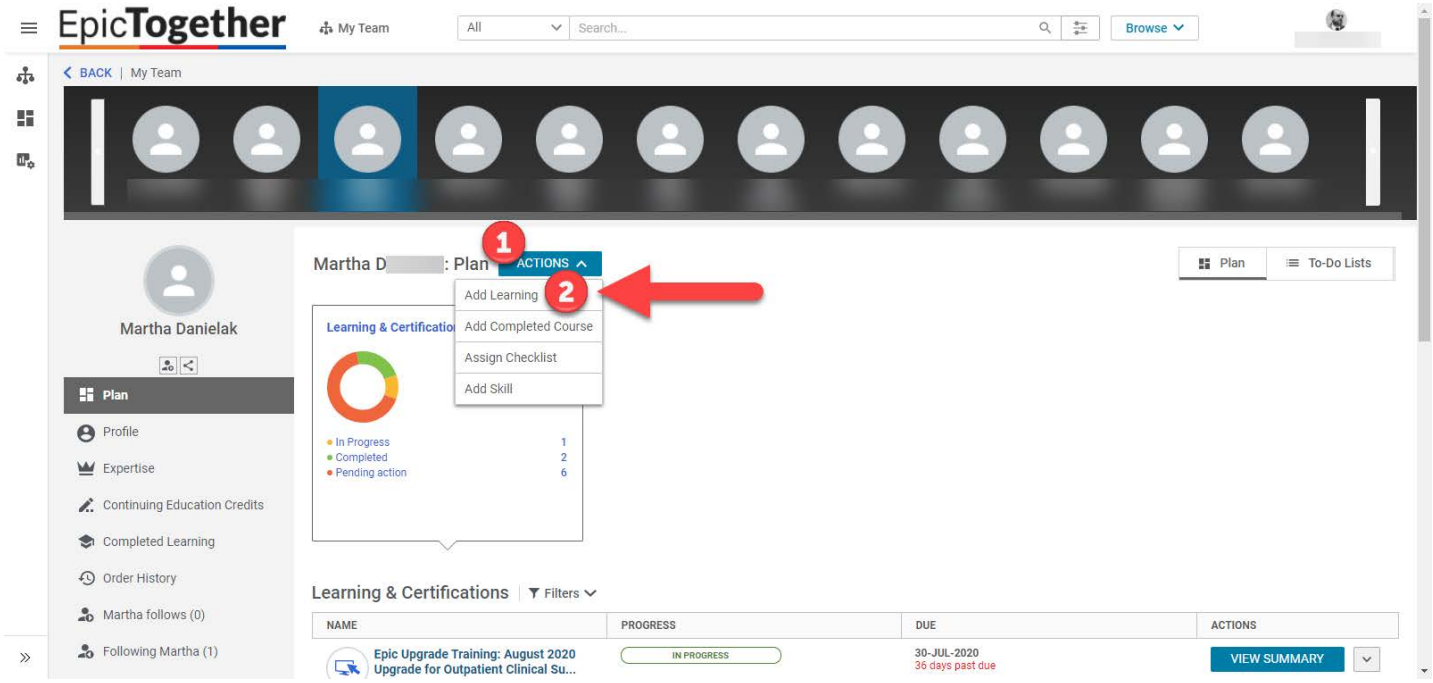
1. The manager listed on the eSAF form logs into Saba at https://nyp.sabacloud.com
2. Click the **three stacked lines** in the top left corner of the page and select **My Team**



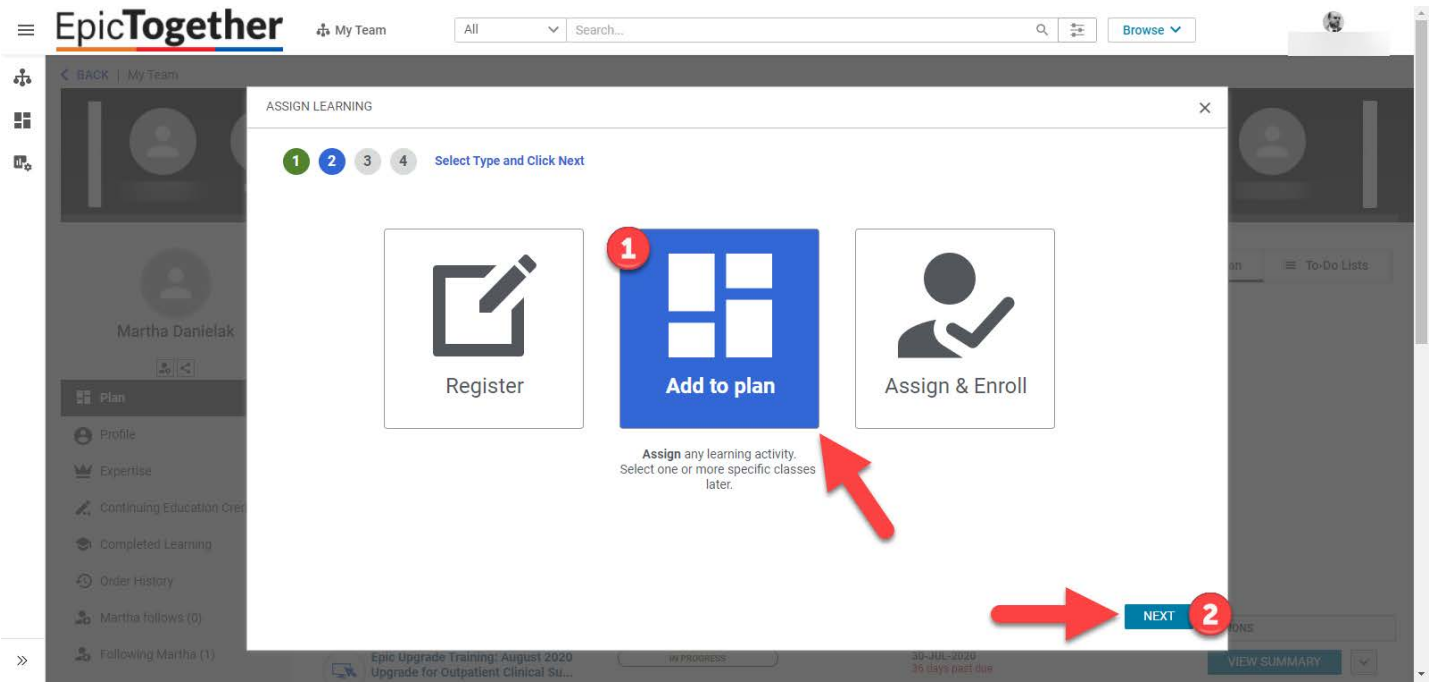
3. Select the individual to register them for training



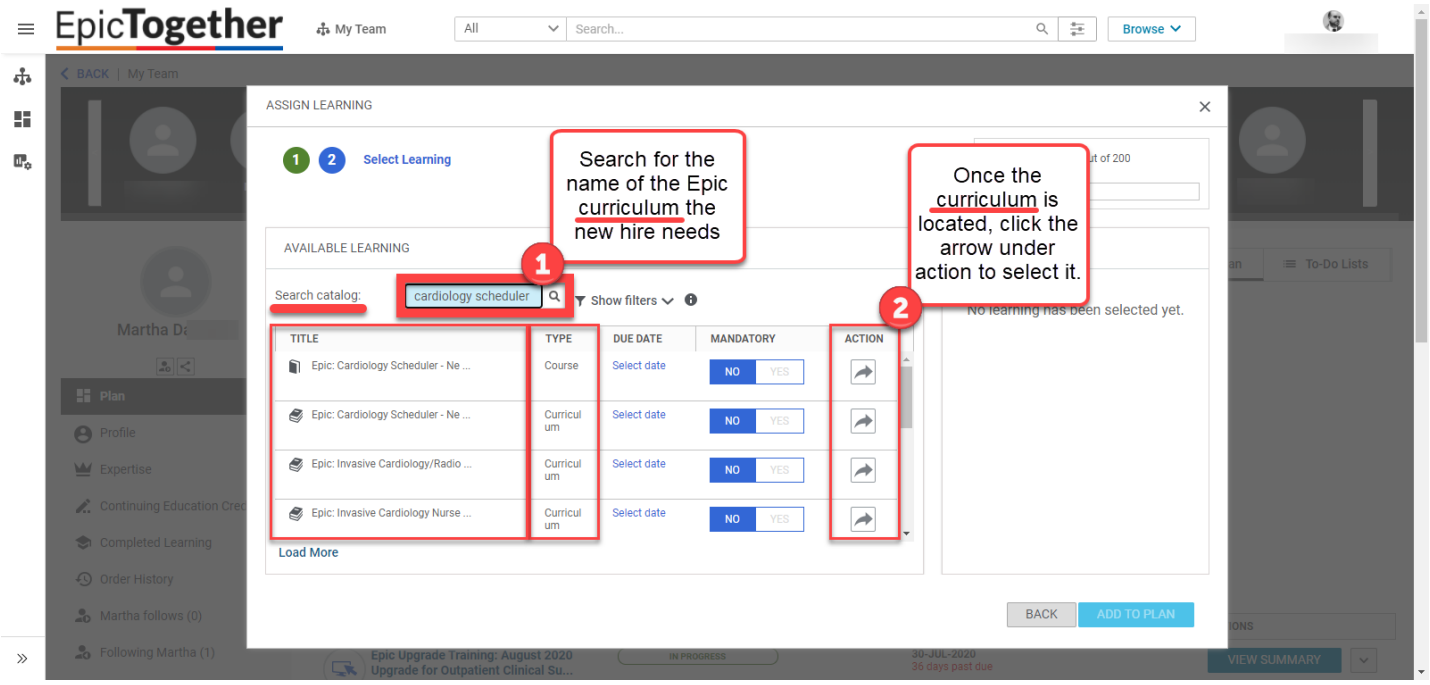
4. Select **Actions** and then **Add Learning**



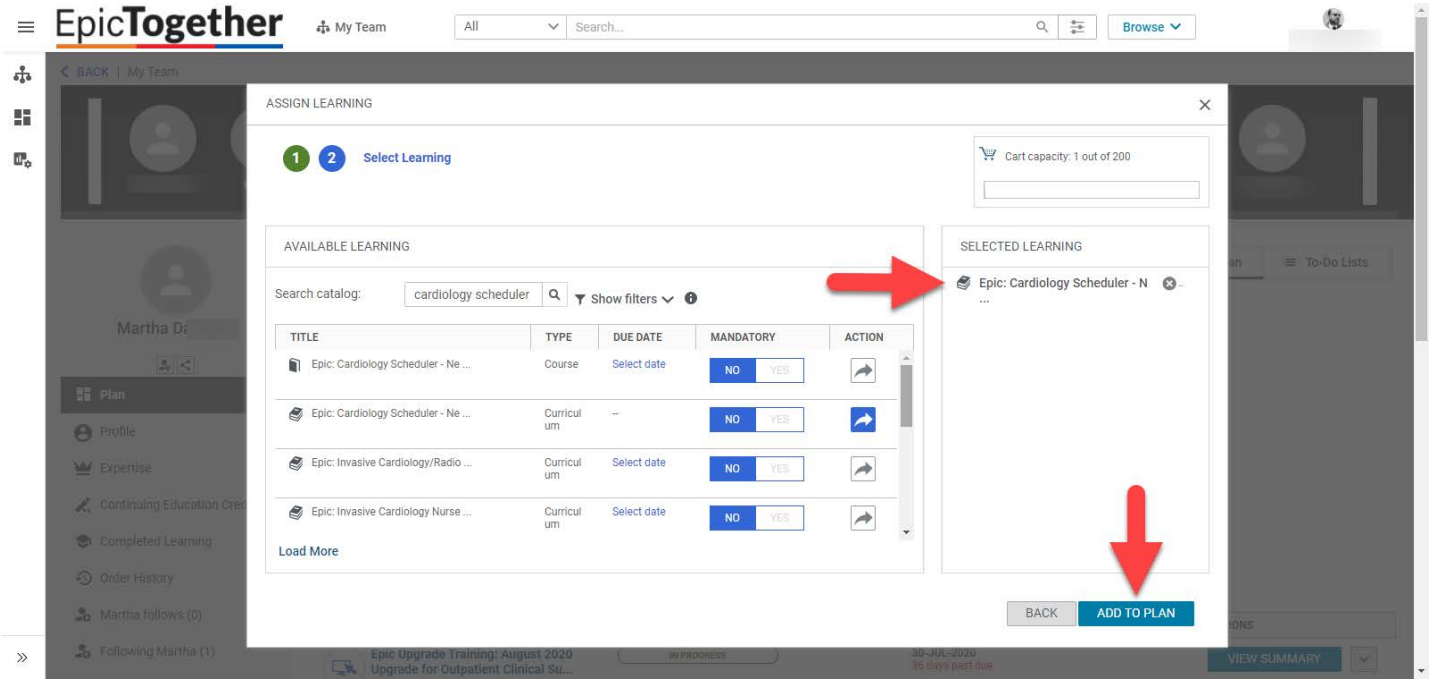
5. Select **Add to Plan** and click **Next**

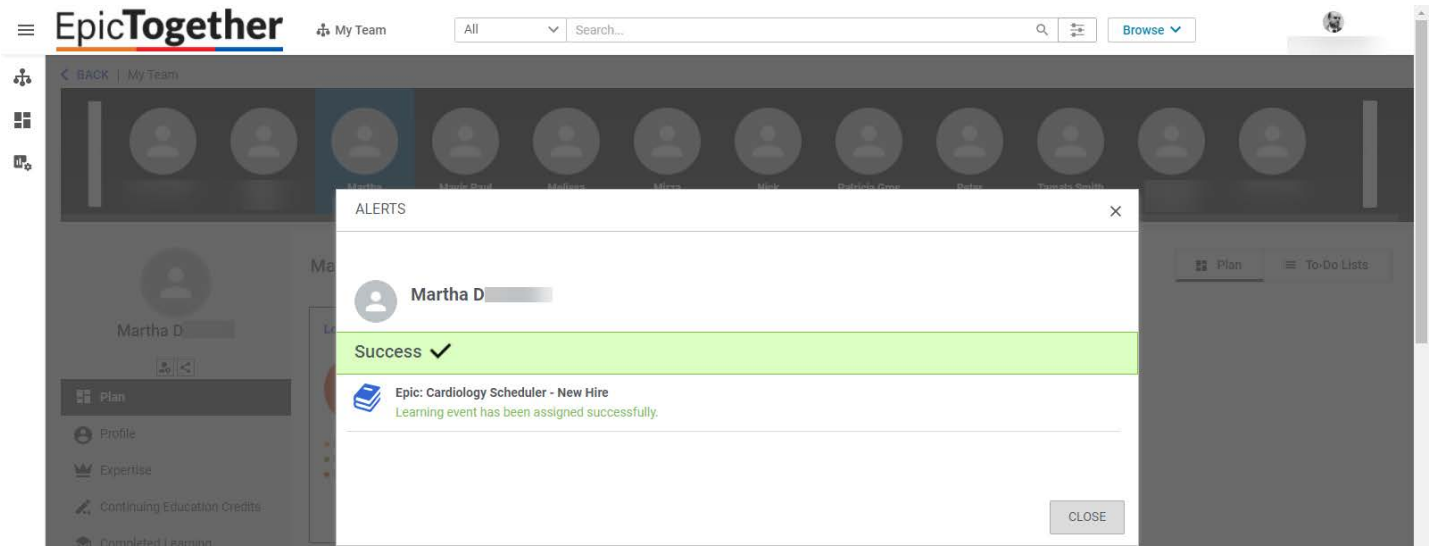


6. Search for the appropriate new hire Epic training curriculum by its name.
    - If you need help with determining which new hire Epic training curriculum applies to the staff member's role, please reach out to epictogethernytraining@nyp.org.



7. Select the **arrow** under the Action column and select **Add to Plan**





8. **You've successfully added the new hire Epic training curriculum at this point, but you have not enrolled the staff member for the individual courses/classes within it.** Please open the document linked below and follow the instructions to enroll the user into the specific classes within the curriculum you've assigned: https://epictogetherny.org/Training/Documents/Epic_Training_Enrollment_Instructions_for_Managers_and_Program_Directors.pdf

Step Four: Epic Provisioning and Access

1. When the user completes training, automated processes run to add the user to the active directory groups required to see the Epic environments in the NYP Citrix Storefront (App Store)
2. The Epic Security team is notified that the user has completed training and creates the user's account in Epic and enables it for login. Access to Epic is typically provisioned 12-24 hours following training completion.
    - Contact epic-security@med.cornell.edu for assistance with Epic system access inquiries