

## Best Practices for Submitting Application Requests via the Service Desk Portal

**To: Program Coordinators**

**BCC: Program Directors as an FYI Only**

**Subject: Best Practices for Submitting Application Requests via the Service Desk Portal**

### Purpose

The purpose of this memo is to:

- help coordinators successfully submit application request via the service desk portal,
- ensure that trainees receive all access to applications necessary for their training,
- and ensure a smooth onboarding process.

### Difficulties Access the Service Desk Portal

Please [test your access now!](#) All coordinators that will be requesting access for their trainees must have access to the service desk portal. If you are still having trouble, please contact Margo Murphy [margaret.murphy@umm.edu](mailto:margaret.murphy@umm.edu) to ensure you have access.

### How to Access the Service Desk Portal

You can find the links for the service desk portal on [The UMMS Insider](#) and click the blue button that says "Service Desk Portal".

### Submitting an Application Request for New User

#### Request for New Hire User

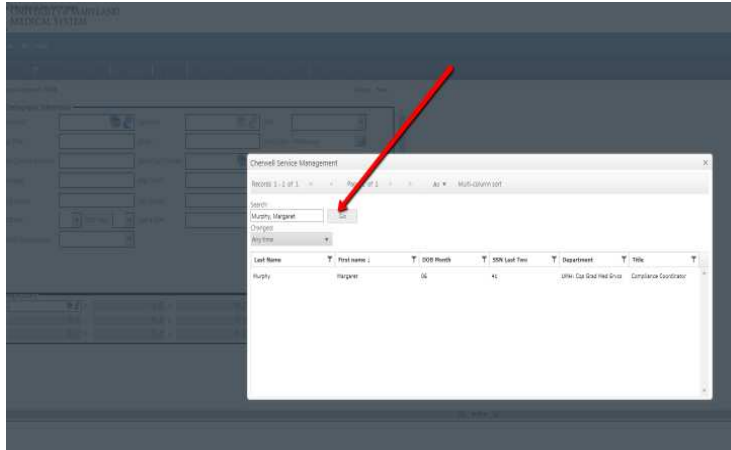
Please watch this 5 minute [tip video](#) to better understand how to submit an application request.

#### Customer Look-Up Feature

Instead of inputting all of the Demographic Information in manually, use the look up feature in the Customer box to find your resident/fellow and it will automate the remaining demographic information.

The screenshot shows the 'Access Request 15856' form in the Service Desk Portal. The form is titled 'Demographic Information' and contains several fields for user details. A red arrow points to a magnifying glass icon next to the 'Customer' field, which is used for the look-up feature. The form includes fields for Customer, Location, Site, Job Title, Email, Start Date, Best Contact Number, Dept/Cost Center, End Date, Manager, Mgr Email, First Name, Last Name, MI, Suffix, DOB Mo, DOB Day, Last 4 SSN, and UMMS Relationship. Below the demographic information is an 'Applications' section with a grid of checkboxes and a 'Submit Access Form' button.

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### Helpful Tips

1. When completing the “Demographic Information” please make sure that the “Job Title” says either “Resident” or “Fellow”
2. The “Manager” field should be the coordinators name and email.
3. **ONE WEEK** before your new hire user needs access OR one week before hospital orientation (whichever is first), complete the application request form through the UMMS Service Desk Portal.
  - a. After you submit the request, the manager must approve the request.
  - b. After the manager approves the request, an email with a link to a confidentiality agreement is sent to the new hire user’s email. (*Confidentiality agreements only go out if the customer lookup tool is not used. If you can find the customer record using the lookup tool – confidentiality agreement is not necessary*)
    - i. The new hire user has 24 hours to complete the confidentiality before the link becomes inactive.
    - ii. If the new hire user does not complete the confidentiality agreement in the first 24 hours, a second email is sent with a new link to the confidentiality agreement. The new hire user has an additional 24 hours to complete the confidentiality agreement.
    - iii. If the new hire user does not complete the confidentiality agreement in the first two 24 hour periods, the application request will stay active for 8 weeks. The user will need to call the help desk (8-HELP or 410.328.4357) to have another email with a new link sent to them. That link will remain accessible for 24 hours.
    - iv. Once the new hire completes the confidentiality agreement, it takes IS&T 2 business days to provide full access to the applications requested for the new hire user.
4. Request applications that model after the paper form. – If it was checked on the form, you’ll check the box in the application request.
5. **Don’t touch anything in the Cherwell Operations Manager tab.** –this is for IT employee’s only
6. Commonly Requested Applications and Definitions

Application	Definition
Epic Portfolio	Electronic Medical Record (EMR)
Cerner Bridge	Clinical Lab that integrates with EMR – Normally only used by Nurse Practitioners

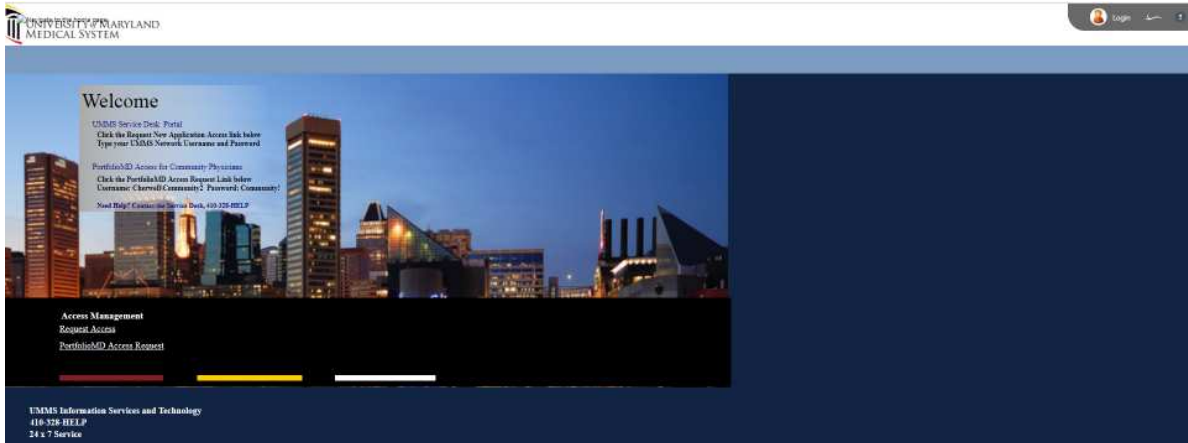
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DMS	Also known as EDMS- Electronic Documentation Management System
Active Directory	UMMS Domain which allows you to log into the network
DocHalo	Secure encrypted software that allows text message from physician to physician
Dragon Medical One	Medical Record Dictation
Imprivata	Clinical workstation Single Sign On: Also for password reset
Outlook	Email <i>***Medicine programs should not request access for this. The Department of Medicine's IT team will set up outlook separately.</i>
My Remote	Remote Network Access for Applications
Synapse PACs and PACs	Radiology Imaging
MUSE	EKG software
ISCV	Intellispace Cardiovascular-replaces Xcelera-used for Cardiovascular Clinical Information
HPF	Horizon Patient Folder- Document management used at UMMC and UMROI ONLY- access is limited

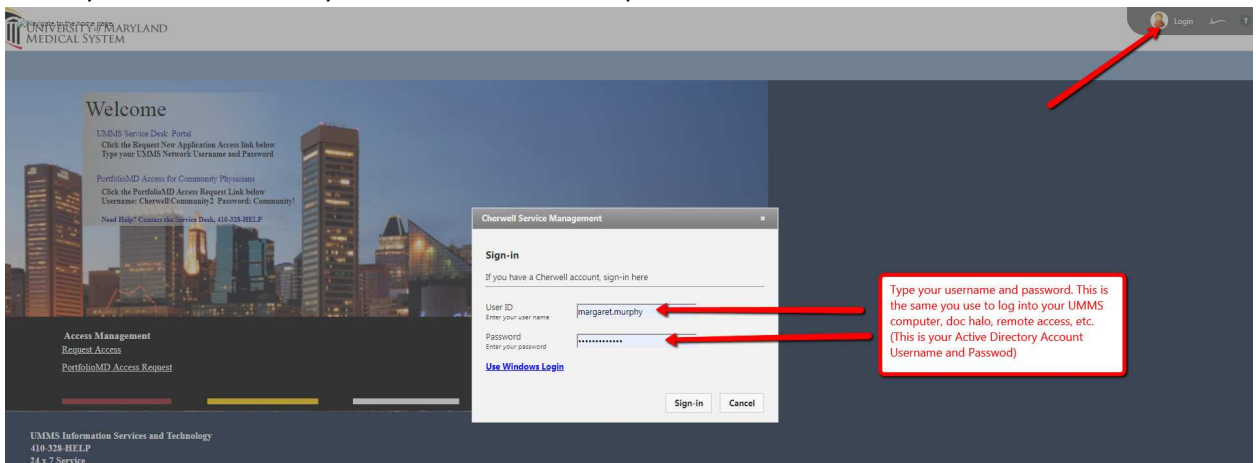
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## Step By Step Instructions

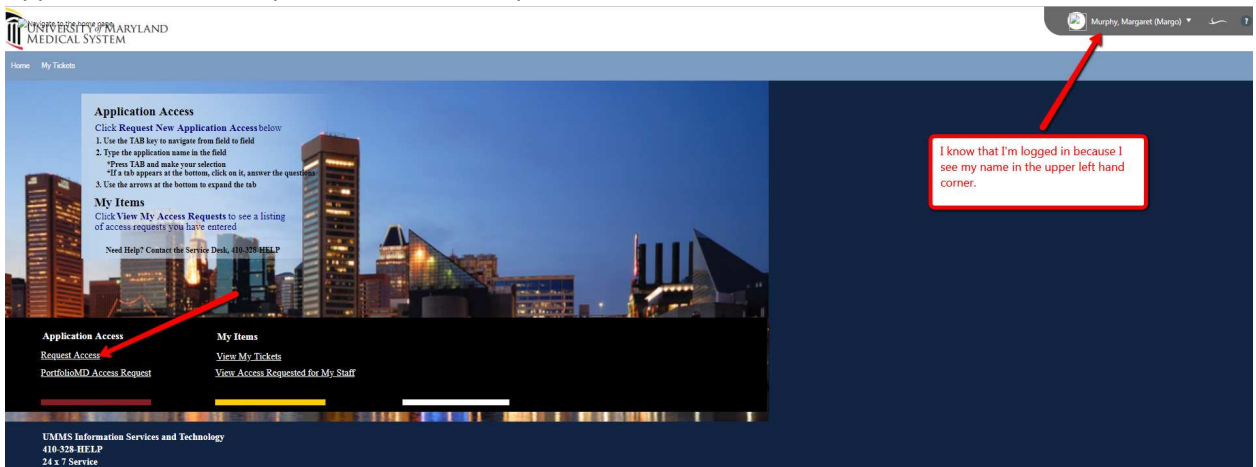
1. Open the Service Desk Portal in your web browser (Margo prefers to use Chrome) <https://cher-prd-web.umms.umm.edu/CherwellPortal/ITOOTBAccessRequest>



2. Click the log in button and type in your username and password. This is the same username and password that you use to log into your UMMS computer, DocHalo account, remote access, etc. This is your Active Directory Account username and password.

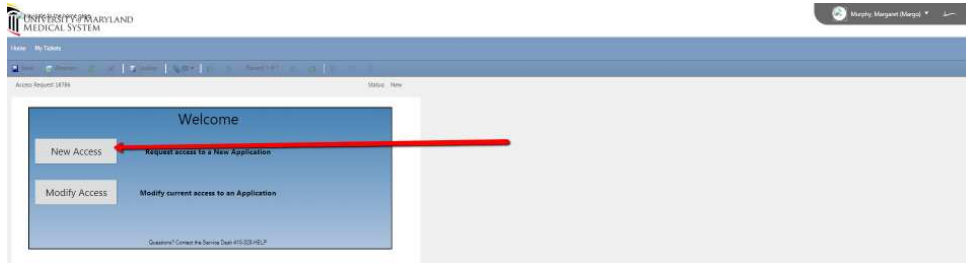


3. You'll know you're signed in when you see your name in the upper left corner. To Submit an Application Access Request Form click "Request Access".

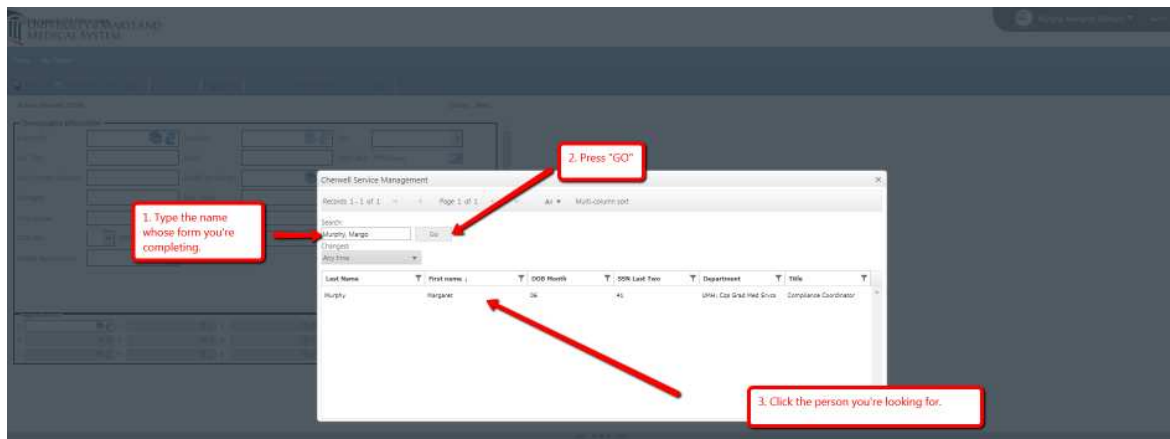
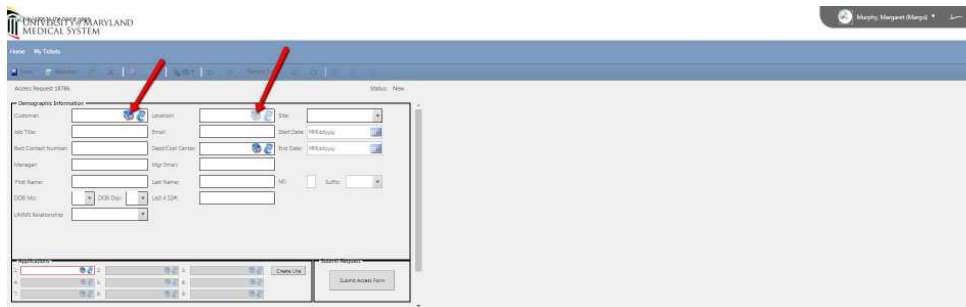


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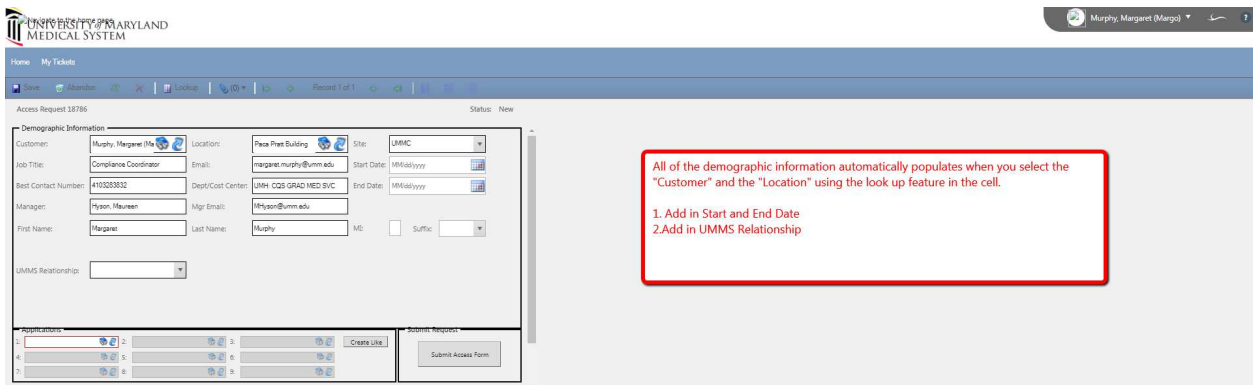
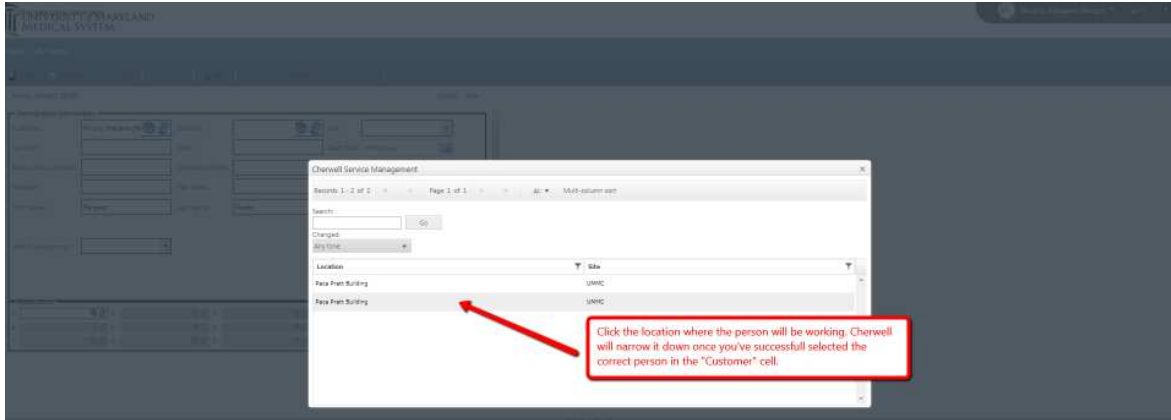
- Click “New Access” for an employee that does not already have access to the application. (This will be the majority of your request forms)



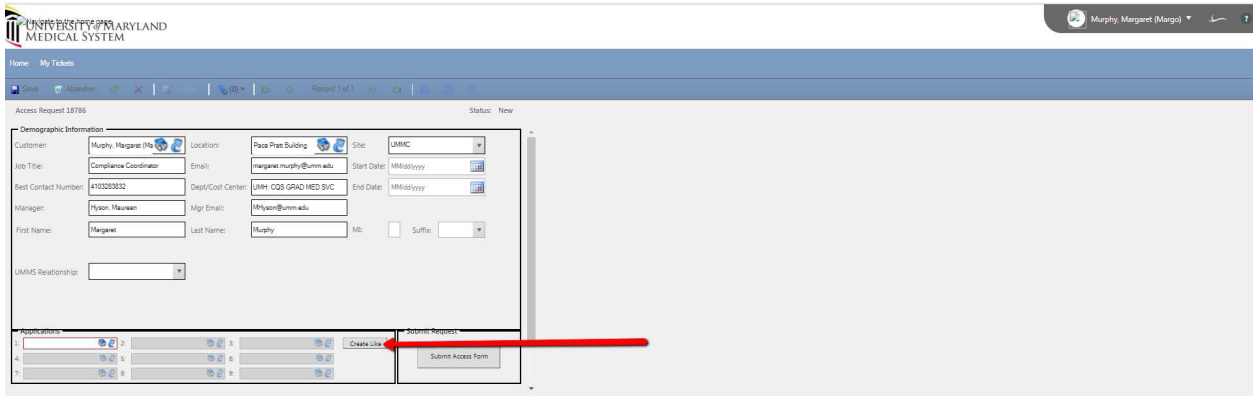
- Enter the Demographic Information using the “look up” feature. Click the binoculars in the “Customer” and the “Location” cells.



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6. If you've submitted an application request before and you would like this resident/fellow's applications to match someone else's, click "Create Like" and enter the ticket number that matches that of the previous user. *(It is recommended to not use "Create Like" if the reference access request is older than three months as it may result in outdated information.)*



## Best Practices for Submitting Application Requests via the Service Desk Portal

UNIVERSITY OF MARYLAND MEDICAL SYSTEM

Murphy, Margaret (Margo)

Home My Tickets

Access Request 18786 Status: New

Demographic Information

Customer: Murphy, Margaret (Margo) Locations: Pasa Pasa Building Site: UMBC

Job Title: Compliance Coordinator Email: mgmurphy@umm.edu Start Date: MM/AA/YYYY

Best Contact Number: 410328352 Dept/Cost Center: UMH CGG GRAD MED SVC End Date: MM/AA/YYYY

Manager: Nyson, Mawuan Mgr Email: bnyson@umm.edu

First Name: Margaret Last Name: Murphy MI: Suffix:

UMMS Relationship:

Applications

Submit Access Form

Prompt

Type Access Request Number to Copy:

OK Cancel

6A. You can find that Ticket Number by going to the HOME page and click “View Access Requested for My Staff”

UNIVERSITY OF MARYLAND MEDICAL SYSTEM

Murphy, Margaret (Margo)

Home My Tickets

Application Access

Click Request New Application Access below:

1. Use the TAB key to navigate from field to field
2. Type the application name in the field  
\*Press TAB and make your selection  
\*If a tab appears at the bottom, click on it, narrow the questions
3. Use the arrows at the bottom to expand the tab

My Items

Click View My Access Requests to see a listing of access requests you have entered

Need Help? Contact the Service Desk, 410-328-HELP

Application Access

Request Access

Portfolio/MD Access Request

My Items

View My Tickets

View Access Requested for My Staff

UMMS Information Services and Technology  
410-328-HELP  
24 x 7 Service

6B. And you can see the Access Management ID Number that is used to create like requests:

UNIVERSITY OF MARYLAND MEDICAL SYSTEM

Murphy, Margaret (Margo)

Home My Tickets

My Access Requests Tuesday, June 18, 2019

My OPEN Access Requests 0

Access Management ID	First Name	Last Name	Created Date Time	Last Modified Date Time	Status	Manager Approved	Conf
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My CLOSED Access Requests 1

Access Management ID	First Name	Last Name	Created Date Time	Last Modified Date Time	Status	Manager Approved	Conf
18118	Leah	Abraham	6/3/2019 1:44 PM	6/4/2019 10:11 AM	Complete	True	

Need Help?

[View My Access Requests](#)

[Help Document](#)

If you have questions about any of the tickets on this screen, please contact the Help Desk @ 410-328-HELP(4337), or email at HelpDesk@umm.edu. Open 24x7

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7. If you have not already submitted an Access Request form to model after, then use the look up feature in the Applications Cell

The screenshot shows the 'Access Request' form in the Service Desk Portal. The form is for user 'Margaret Mergel' with ID '41500802'. A red arrow points to the 'Applications' table at the bottom of the form, which is currently empty.

The screenshot shows the 'Client Service Management' dialog box. Three red annotations are present:

- 1. Type "Epic Portfolio" to request Epic Access. (Points to the search input field)
- 2. Press "GO". (Points to the search button)
- 3. Click "Epic Portfolio" to add this application to the access request form. (Points to the 'Epic Portfolio' entry in the results list)

The screenshot shows the 'Access Request' form with the 'Applications' table populated with 'Epic Portfolio'. A red arrow points from the 'Requester Information' field to a text box containing the instruction: 'Enter full name (and employee ID number if you have it) of trainee that has Epic Access that your resident/fellow should model after.'

8. Click "Submit Access Form"

The screenshot shows the 'Access Request' form with the 'Requester Information' field filled. A red arrow points to the 'Submit Access Form' button at the bottom right of the form.



Cost Centers (as of February 2020)

<b>Cost Center</b>
201030139 - CLINIC PSYCHIATRY INTERNS
201040329 - RESIDENTS ANESTHESIOLOGY RSD
201040331 - RESIDENTS DENTISTRY RSD
201040333 - RESIDENTS DERMATOLOGY RSD
201040335 - RESIDENTS EMERGENCY MED RSD
201040337 - RESIDENTS FAM MED RSD
201040340 - RESIDENTS GCC RSD
201040341 - RESIDENTS GME MGMT
201040342 - RESIDENTS MED RSD
201040344 - RESIDENTS NEUROLOGY RSD
201040346 - RESIDENTS NEUROSURG RSD
201040348 - RESIDENTS OB/GYN RSD
201040350 - RESIDENTS OPHTHALMOLOGY RSD
201040352 - RESIDENTS ORTHO RSD
201040354 - RESIDENTS OTOLARYNGOLOGY RSD
201040356 - RESIDENTS PATHOLOGY RSD
201040358 - RESIDENTS PEDS RSD
201040362 - RESIDENTS PREVENTATIVE MED RSD
201040364 - RESIDENTS PSYCHIATRY BALT
201040365 - RESIDENTS PSYCHIATRY MERCY
201040366 - RESIDENTS PSYCHIATRY RSD
201040367 - RESIDENTS PSYCHIATRY SP
201040368 - RESIDENTS PSYCHIATRY SP CFED
201040369 - RESIDENTS PSYCHIATRY SP HS
201040374 - RESIDENTS RADIATION ONCOL RSD
201040375 - RESIDENTS RADIOLOGY RSD
201040377 - RESIDENTS STC RSD
201040379 - RESIDENTS SURG RSD
201040425 - RESIDENTS PSYCHIATRY VABA