#### Review and Certify UW Medicine Account Accesss using SailPoint IdentityIQ

#### **Purpose / Overview**

Managers of UW Medicine staff are required to review their team access to Epic and Active Directory, certifying compliance with UW Medicine ITS identity and access management standards.

Please review the instructions in this guide and complete your audit steps as outlined.

#### Supervisor Task Summary

STE	P	Required/Optional
	Review Frequently Asked Questions	Optional
1.	Log into SailPoint IdentityIQ	Required
2.	Navigate to Pending Certification	Required
3.	Review the list of user accounts and Line-Item	Required
	Approve or Deny	
4.	Delegate review to another manager.	Optional
5.	Sign-off on Access	Required

#### **Frequently Asked Questions**

Question	Answer
Some of my current team members do not appear on my certification list. What should I do?	You're seeing the list of accounts your team members have, not necessarily all of your team members. Common causes of unlisted members would be that the missing team members do not have AMC accounts or they may be assigned to another manager. You can email <u>iamaudit@uw.edu</u> and we can research the issue. Do not approve your certification if you do not have all team members on your list.
I do not recognize some team members on my list or they have since transferred to another team. What should I do?	Use the reassign function outlined in Step 4 of this guide to assign these members to another manager if you know which team they should be on. If you do not know on which team they should belong, email <u>iamaudit@uw.edu</u> for assistance.
Some team members on my list have separated from UW Medicine and I know they have not returned to work for another team. What should I do?	Click "Remove" for access to Epic and AMC.
I have line items that refer to accounts that are utility accounts or services, not actual people. What should I do?	If you do not use or recognize them, click "Remove" for access to Epic and AMC.
I need to ask someone else to review my list for me while I'm gone. What should I do?	Use the reassign function outlined in Step 4 of this guide to assign these members to another manager Then type in some comments to give them guidance. Then click the Reassign button.

## Review and Certify UW Medicine Account Access Supervisor Guide

## STEP 1: Log into SailPoint IdentityIQ (required)

Estimated Time: 1 minute

TAS	SK	NOTES
1.	Log into Pulse Secure SSLVPN or connect to UW Medicine "on site" networks on an AMC computer.	https://sslvpn.medical.washington.edu
2. *S Ec	Click the Internet Explorer web browser on your desktop. ailPoint IdentityIQ is also compatible with Ige, Firefox, and Chrome	e
4.	Navigate to https://sailpoint.uwmedicine.org	
5.	Log into SailPoint using your AMC Username and Password.	
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#### STEP 2: Navigate to Pending Certification (required)

Estimated Time: 1 minute

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1. The pending Access Reviews Click on Access Reviews.	s box will display the number of r	eviews you need to complete.
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2. A list of your team members and their accounts will display. The names listed should be your direct reports as of the start of the audit period.

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# STEP 3: Review the List of User Accounts and Line-Item Approve or Deny (required)

Estimated Time: 3-5 minutes

1.	Review each line item on the report.
	Each person will potentially have AMC or EPIC access, as indicated by account name.
	Click the green Approve button or the grange <b>Revoke Account</b> button on the far right for each name
	listed
	Revoking AMC Account access means the individual will lose
0	The ability to log into an AMC workstation
0	The ability to login to Kronos
0	The ability to access Epic
0	UW email access – IF – they have no other reason for email @uw.edu (e.g.Alumni, retirees, UW
	employment elsewhere)
0	SharePoint
0	Fileshare access
0	Access to many other applications
	Revoking Epic Account access means the individual will lose:
0	Access to Enic only
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2.	Need more information to decide?
	Details are available on each line item under the navigation menu on the far left, aka the "hamburger
	menu":
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#### 3. AMC account detail example

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co, Lisa Marie	description: ## ProjMgr Rev Cycle; M; ITS - ORCA		_		
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#### 4. Epic account details example

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LoginDepartmentFilterSetting: E	Exclusive		
Name: James S Simmons			
ons inish reviewing each lin Clear	ne, be sure to click Save	Decisions at the bottom	

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#### STEP 4: Delegate Items to Another Manager (optional)

#### **Estimated Time: 1 minute**

Do this when items on your list should be reviewed by another manager.

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3. A pop-up window opens with details you need to fill out: the Recipient, the Description, and your Comments

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5. **Place a comment on the reassignment.** When you reassign, be sure to leave a Comment for the person who receives it. The will receive some information about the reassignment from SailPoint, but the specific reason you're reassigning it is helpful for them to know why they're seeing it. A sentence or two is all that's needed.

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## STEP 5: Sign-off on Access (required)

Estimated Time: 1 minute

TASK					
	<b>Final Sign-Off: Complete the Certification</b> ONE LAST TASK - YOU MUST DO THIS STEP TO COMPLETE THE CERTIFICATION! After you save your decisions and all team member decisions are accounted for, you must provide final Sign-off.				
1.	Click Sign-Off Decisions – once you do that, You are done!				
	Almost Done! You have taken action on all items in this access review. To complete the access review, sign off on all certification decisions made. By doing this, you certify that all decisions - either selected by yourself or a delegate - are correct to the best of your knowledge. <b>Sign_Off Decisions</b> Review Decisions and Sign-Off Later				