

Review and Certify UW Medicine Account Access Supervisor Guide

Review and Certify UW Medicine Account Access 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

STEP		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 Approve or Deny	Required
4.	Delegate review to another manager.	Optional
5.	Sign-off on Access	Required


Frequently Asked Questions

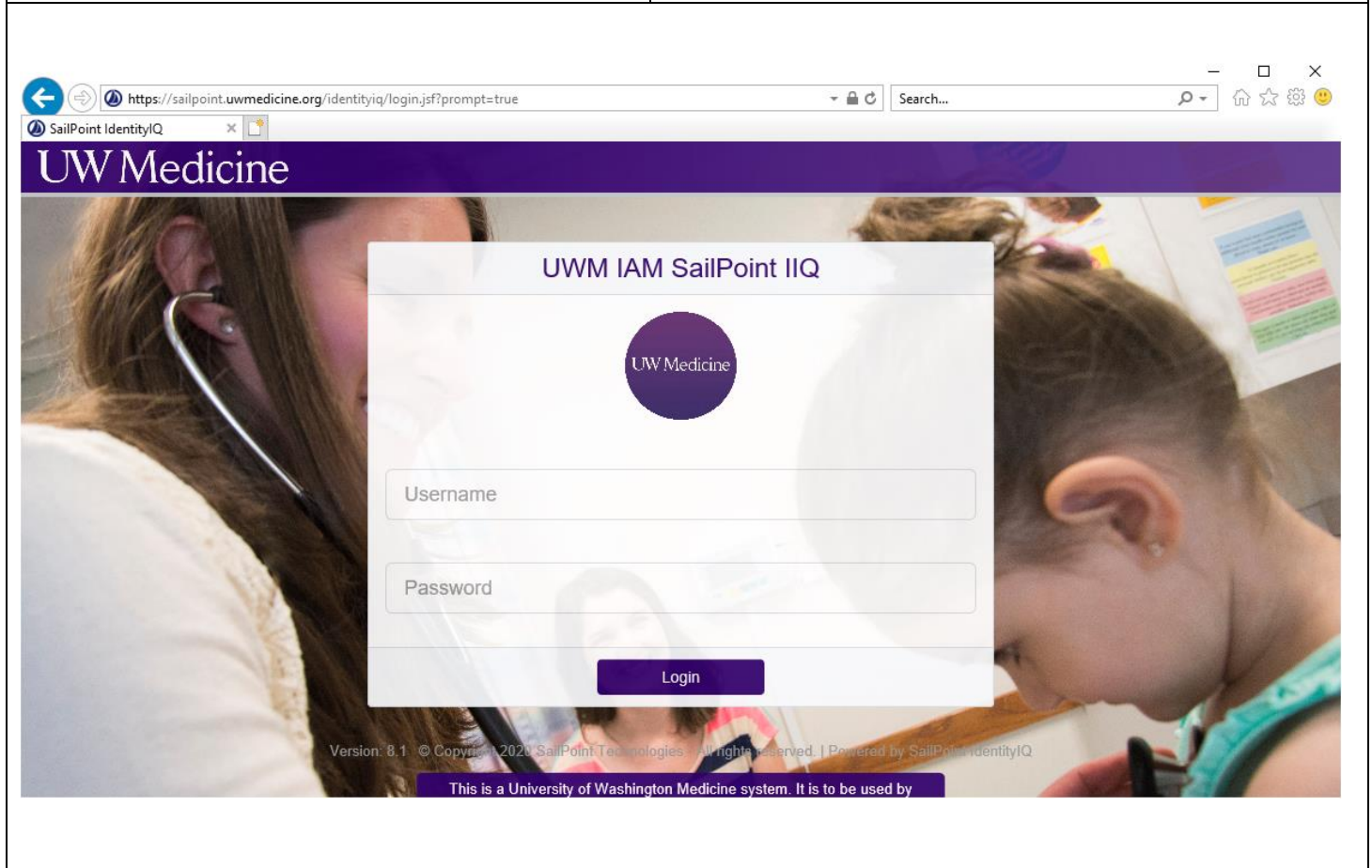
Question	Answer
<p>Some of my current team members do not appear on my certification list. What should I do?</p>	<p>You're seeing the list of accounts your team members have, not necessarily all of your team members. Common causes of unlisted members would be that the missing team members do not have AMC accounts or they may be assigned to another manager. You can email iamaudit@uw.edu and we can research the issue. Do not approve your certification if you do not have all team members on your list.</p>
<p>I do not recognize some team members on my list or they have since transferred to another team. What should I do?</p>	<p>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 iamaudit@uw.edu for assistance.</p>
<p>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?</p>	<p>Click "Remove" for access to Epic and AMC.</p>
<p>I have line items that refer to accounts that are utility accounts or services, not actual people. What should I do?</p>	<p>If you do not use or recognize them, click "Remove" for access to Epic and AMC.</p>
<p>I need to ask someone else to review my list for me while I'm gone. What should I do?</p>	<p>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.</p>

Review and Certify UW Medicine Account Access Supervisor Guide

STEP 1: Log into SailPoint IdentityIQ (required)

Estimated Time: 1 minute

TASK	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. Click the Internet Explorer web browser on your desktop. *SailPoint IdentityIQ is also compatible with Edge, Firefox, and Chrome	
4. Navigate to https://sailpoint.uwmedicine.org	
5. Log into SailPoint using your AMC Username and Password.	

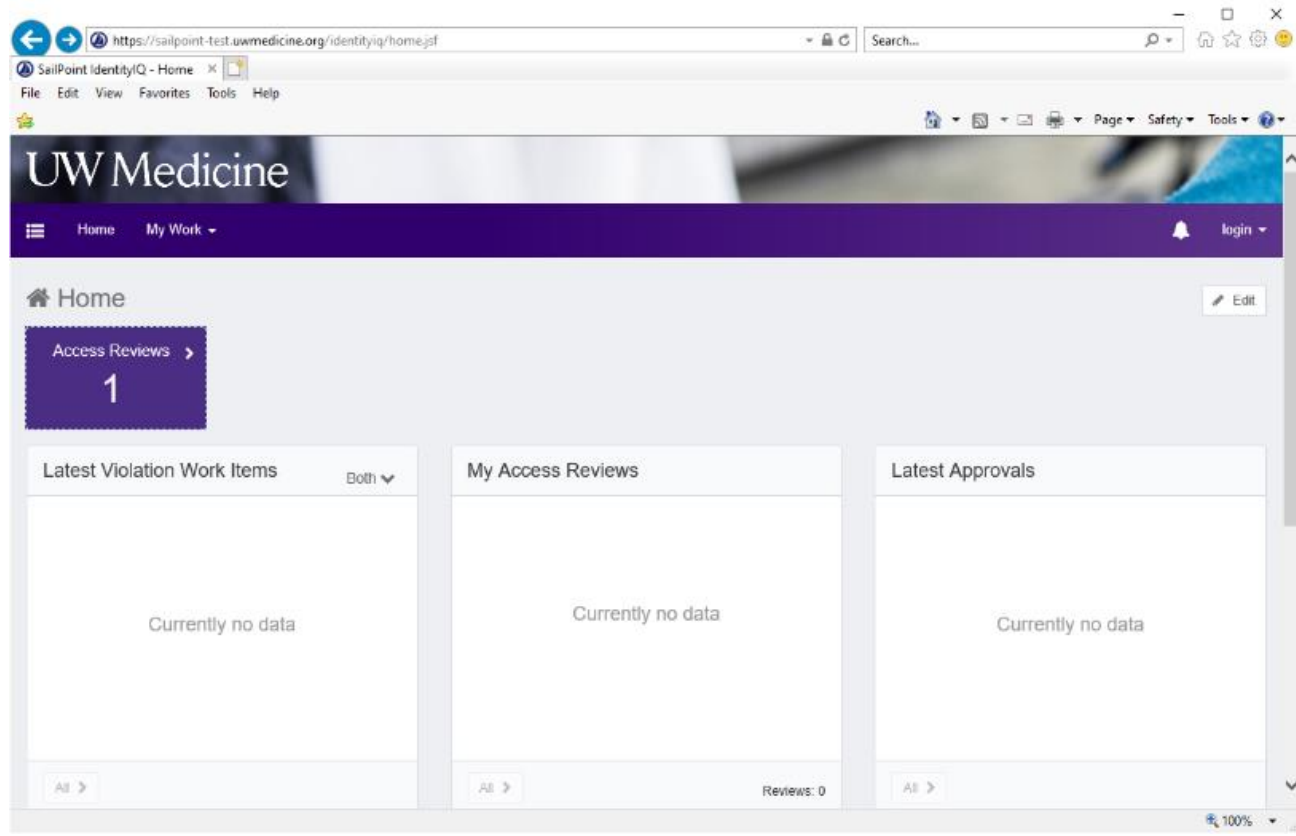


STEP 2: Navigate to Pending Certification (required)

Estimated Time: 1 minute

TASK

1. The pending Access Reviews box will display the number of reviews you need to complete. Click on **Access Reviews**.



Review and Certify UW Medicine Account Access Supervisor Guide

- 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.

The screenshot displays the 'SailPoint 2020 Q3 Manager Certification' interface. At the top, there is a navigation bar with 'UW Medicine' branding and menu items like Home, My Work, Identities, Applications, Intelligence, and Setup. Below the navigation bar, the page title is 'SailPoint 2020 Q3 Manager Certification'. There are buttons for 'List', 'Open' (with a count of 14), and 'Review' (with a count of 0). The main content area features a table with columns for First Name, Last Name, Type, Display Name, Account Name, Identity, and Decision. Each row represents a user account with associated details and 'Approve' and 'Revoke Account' buttons.

First Name	Last Name	Type	Display Name	Account Name	Identity	Decision
James	Simmons	Account	Account james11 on AMC-Active-Directory	james11	Simmons, Jim	Approve Revoke Account
James	Simmons	Account	Account EUID5025490 on EPIC	EUID5025490	Simmons, Jim	Approve Revoke Account
Lisa	Puliafco	Account	Account Impull on AMC-Active-Directory	Impull	Puliafco, Lisa Marie	Approve Revoke Account
Lisa	Puliafco	Account	Account EUID5017712 on EPIC	EUID5017712	Puliafco, Lisa Marie	Approve Revoke Account
Cyndi	O'Farrell	Account	Account cyndiof on AMC-Active-Directory	cyndiof	O'Farrell, Cyndi	Approve Revoke Account
Cyndi	O'Farrell	Account	Account EUID5025994 on EPIC	EUID5025994	O'Farrell, Cyndi	Approve Revoke Account
Kirsten	Haynes	Account	Account haynesk on AMC-	haynesk	Haynes, Kirsten	Approve Revoke Account

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 orange **Revoke Account** button on the far right for each name listed.

Revoking AMC Account access means the individual will lose

- The ability to log into an AMC workstation
- The ability to login to Kronos
- The ability to access Epic
- UW email access – IF – they have no other reason for email @uw.edu (e.g.Alumni, retirees, UW employment elsewhere)
- SharePoint
- Fileshare access
- Access to many other applications

Revoking Epic Account access means the individual will lose:

- Access to Epic only

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”:



3. AMC account detail example

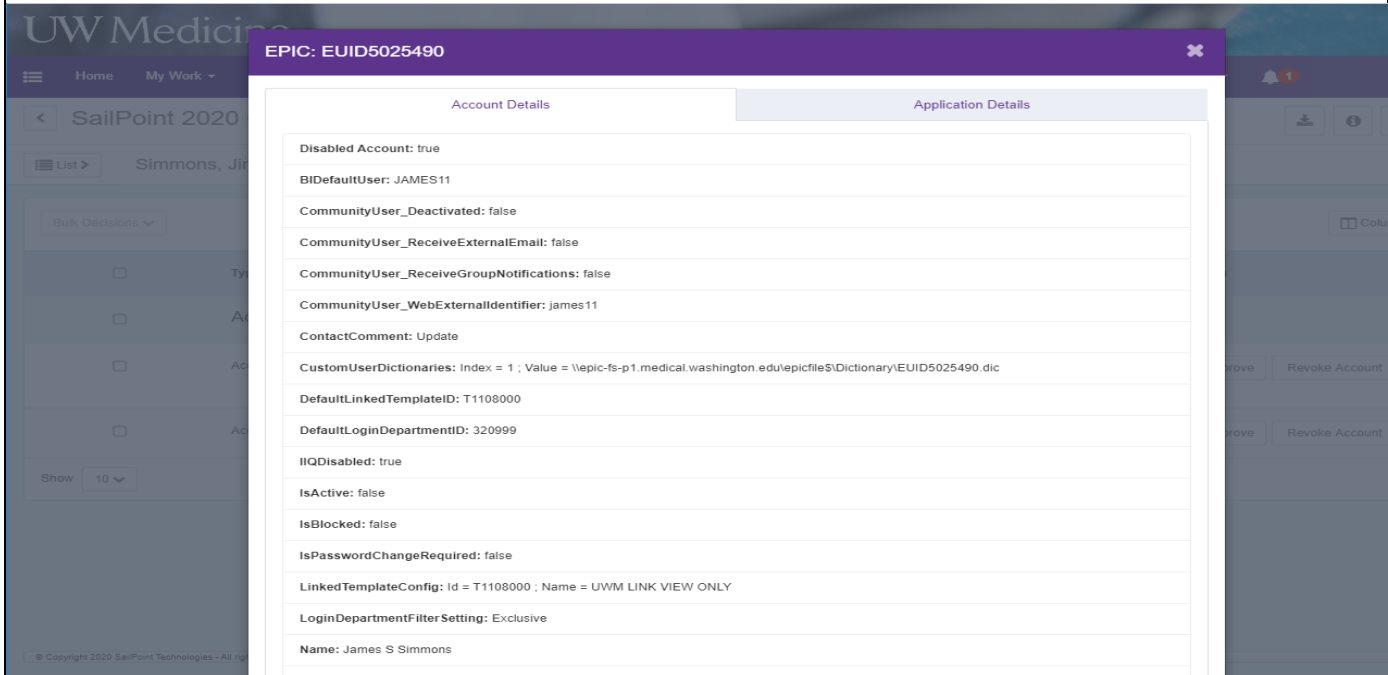
The screenshot displays the SailPoint IdentityIQ interface. A modal window titled "AMC-Active-Directory: james11" is open, showing account details for a user named James S. Simmons. The modal is divided into two tabs: "Account Details" (selected) and "Application Details".

Account Details:

- Disabled Account: false
- accountFlags:
 - Normal User Account
 - Password Cannot Expire
 - Password Not Required
- cn: james11
- description: ## ProjMgr Rev Cycle; M; ITS - ORCA
- displayName: Simmons, James S
- distinguishedName: CN=james11,OU=UserAccounts,DC=testamc,DC=uwmedicine,DC=org
- givenName: Jim
- initials: S
- msDS-PrincipalName: TESTAMC\james11
- msNPAllowDialin: Not Set
- objectClass:
 - top
 - person
 - organizationalPerson
 - user
- objectSid: S-1-5-21-979574506-308041224-658320111-116676
- objectType: user
- objectguid: {6e8694e8-2424-4af6-8b92-568846197f1f}

The background shows a list of identities with columns for name and email address. The user "Simmons, Jim" with email "james11@uw.edu" is selected.

4. Epic account details example



5. Save Decisions

When you finish reviewing each line, be sure to click **Save Decisions** at the bottom



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.

TASK

1. **Check line item boxes to select for reassignment.** Check off any line items you would like to reassign. On the left hand side of each row is a box you can tick off. Checking the box selects the rows.

The screenshot shows the SailPoint IdentityIQ Manager Certification interface. The page title is "SailPoint 2020 Q2 Manager Certification Mark Watkins". There is a notification "Due In 5 Days". The interface shows a list of accounts for reassignment. The "Reassign (3)" button is visible. The table below shows the details of the accounts.

	First Name	Last Name	Type	Display Name	Description	Application	Account Name	Decision
<input checked="" type="checkbox"/>	Thomas	Youdenian	Account	Account tyoud	Account on AMC-Active-Directory	AMC-Active-Directory	tyoud	Approve Revoke Account
<input checked="" type="checkbox"/>	Thomas	Youdenian	Account	Account EUID5013229	Account on EPIC	EPIC	EUID5013229	Approve Revoke Account
<input checked="" type="checkbox"/>	Thomas	Youdenian	Account	Account		AMC-	tyoud_	Approve Revoke Account

Review and Certify UW Medicine Account Access Supervisor Guide

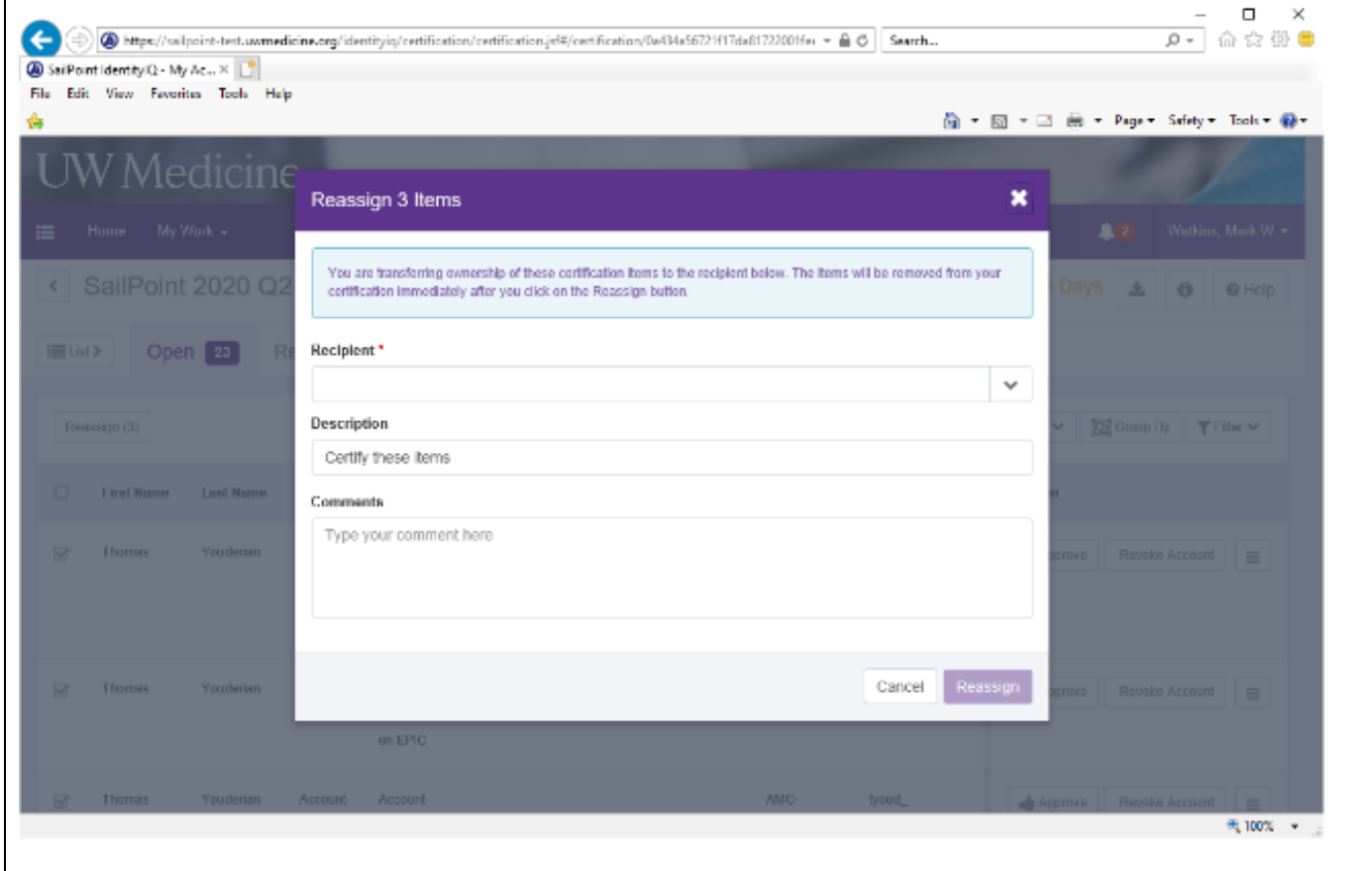
2. Click the Reassign button. Located in the upper left, above the list.

The screenshot shows the SailPoint IdentityIQ interface for a certification review. The page title is "SailPoint 2020 Q2 Manager Certification Mark Watkins". A notification indicates "Due In 5 Days". The interface includes a navigation bar with "Home" and "My Work" options, and a user profile for "Watkins, Mark W". Below the navigation, there are tabs for "List", "Open 23", and "Review 0". The main content area displays a table of accounts for review. A "Reassign (3)" button is highlighted with a red box in the upper left corner of the table area. The table has columns for checkboxes, First Name, Last Name, Type, Display Name, Description, Application, Account Name, and Decision. Three rows of account data are visible, each with an "Approve" and "Revoke Account" button in the Decision column.

<input type="checkbox"/>	First Name	Last Name	Type	Display Name	Description	Application	Account Name	Decision
<input checked="" type="checkbox"/>	Thomas	Youderian	Account	Account tyoud on AMC- Active- Directory		AMC- Active- Directory	tyoud	<input type="button" value="Approve"/> <input type="button" value="Revoke Account"/>
<input checked="" type="checkbox"/>	Thomas	Youderian	Account	Account EUID5013229 on EPIC		EPIC	EUID5013229	<input type="button" value="Approve"/> <input type="button" value="Revoke Account"/>
<input checked="" type="checkbox"/>	Thomas	Youderian	Account	Account		AMC-	tyoud_	<input type="button" value="Approve"/> <input type="button" value="Revoke Account"/>

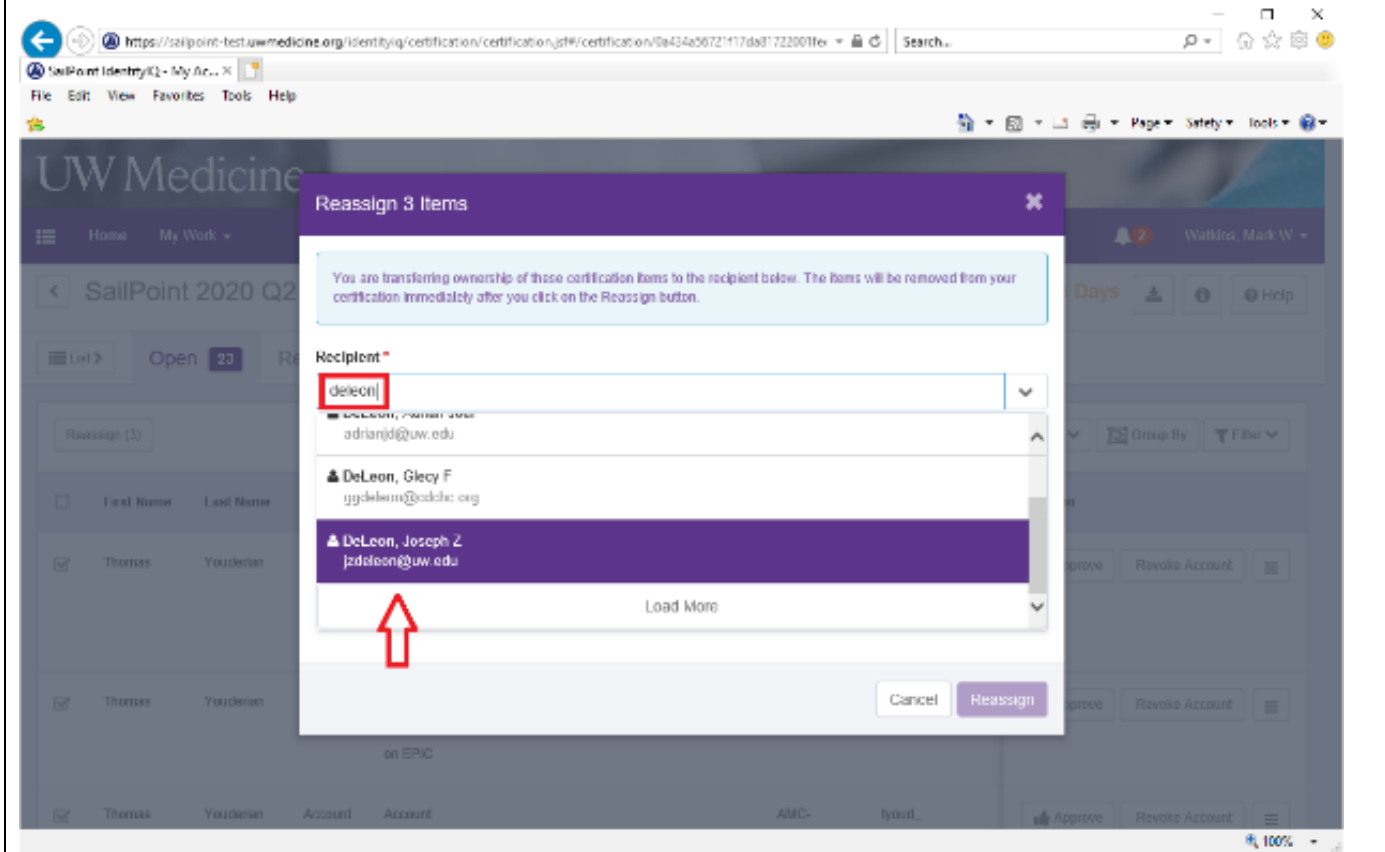
Review and Certify UW Medicine Account Access Supervisor Guide

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



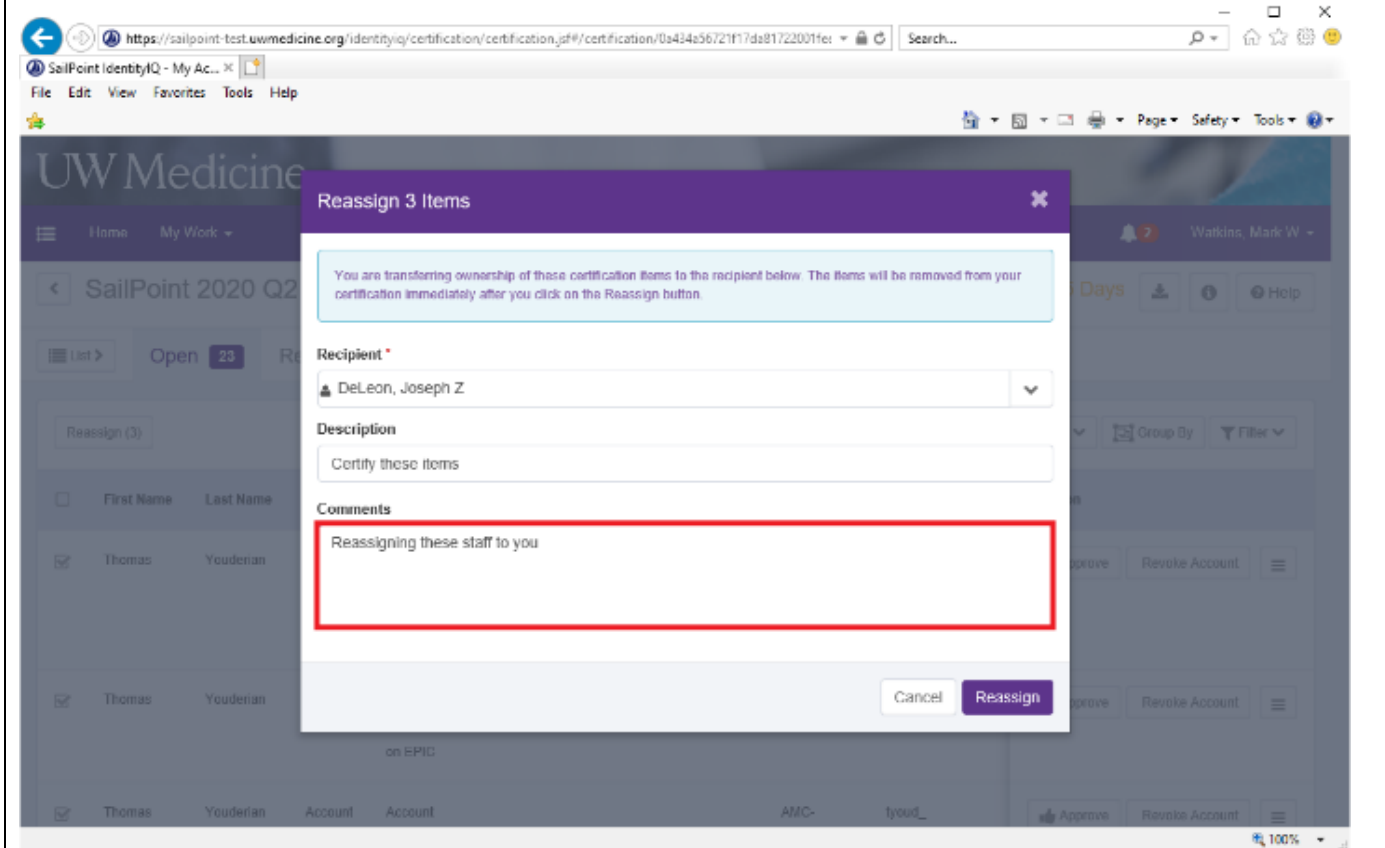
Review and Certify UW Medicine Account Access Supervisor Guide

4. Search for the new recipient by Last Name, and once you find them, left-click to select them from the list.

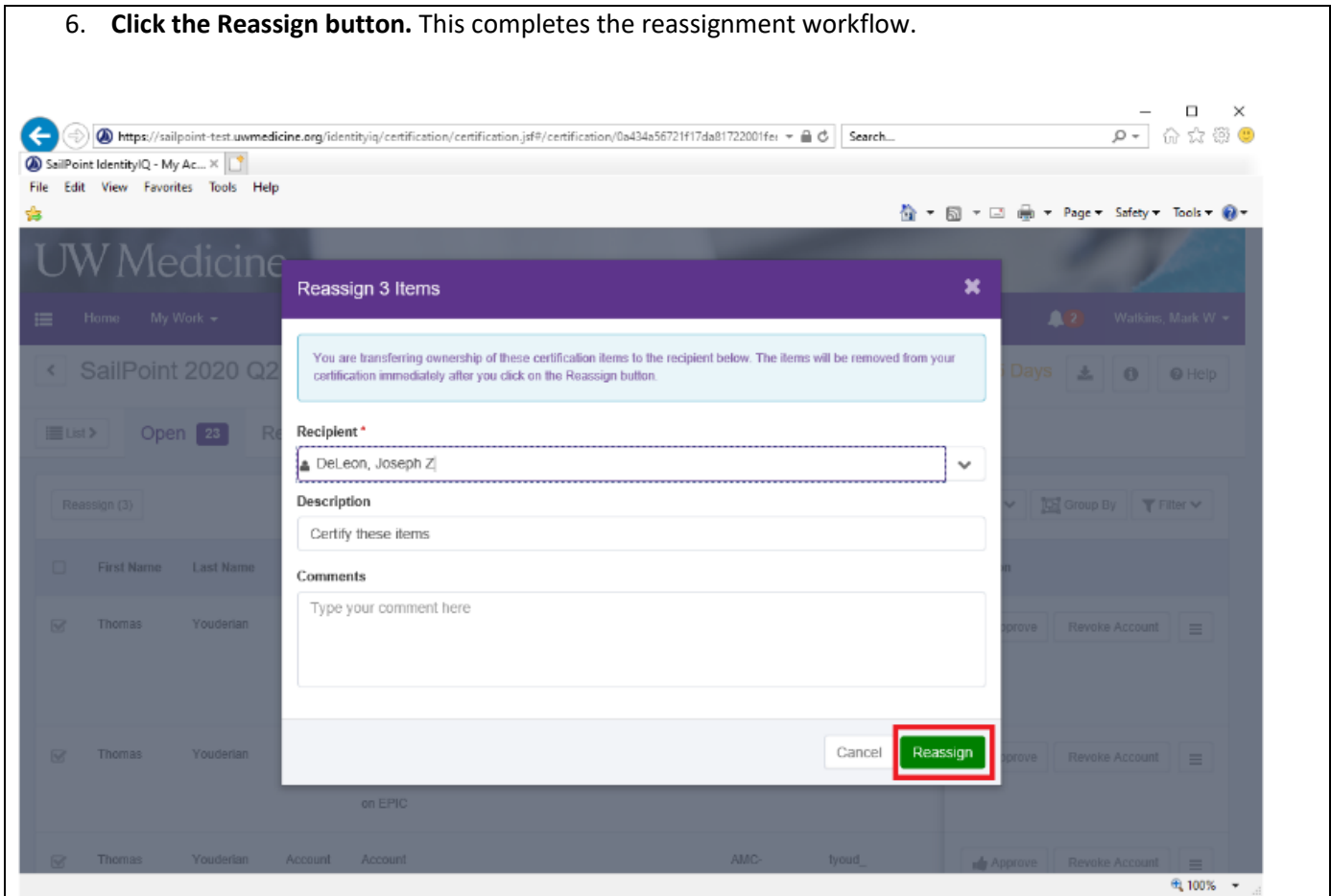


Review and Certify UW Medicine Account Access Supervisor Guide

5. **Place a comment on the reassignment.** When you reassign, be sure to leave a Comment for the person who receives it. They 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.



6. Click the Reassign button. This completes the reassignment workflow.



STEP 5: Sign-off on Access (required)

Estimated Time: 1 minute

TASK

Final Sign-Off: Complete the Certification

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!

