

Training Tracker Entry Instructions

STEP 1:

[Go to Upstate Ipage](#)

STEP 2:

Click on Self-Serve

The screenshot shows the Upstate Ipage dashboard. At the top, there is a navigation bar with tabs for IPAGE, ALL STAFF, STUDENTS, FACULTY, RESEARCHERS, HEALTHCARE PROVIDERS, ADMINISTRATORS/MANAGERS, and CAREERS @ UPSTATE. Below this is a secondary navigation bar with links for Labor Pool Sign-Up, Covid-19 Information, Hospital Visitor Guidelines, and Wellbeing & Mental Health Resources. The main content area is divided into several sections: COVID RELATED LINKS (Upload Vaccine Information, Self-Report COVID-19 Test/FAQs, Employee/Student Health Portal), APPLICATIONS (Self Serve, Outlook, Kronos, IMT / Epic Resources, Clinical Launch Pad, Vocera, My Upstate, Brightspace, MyAccounts), and INTRA DASHBOARD (ER STATUS, HOSPITAL STATUS, INCIDENT COMMAND, HELIPAD STATUS). The Self-Serve application icon in the APPLICATIONS section is highlighted with a red box.

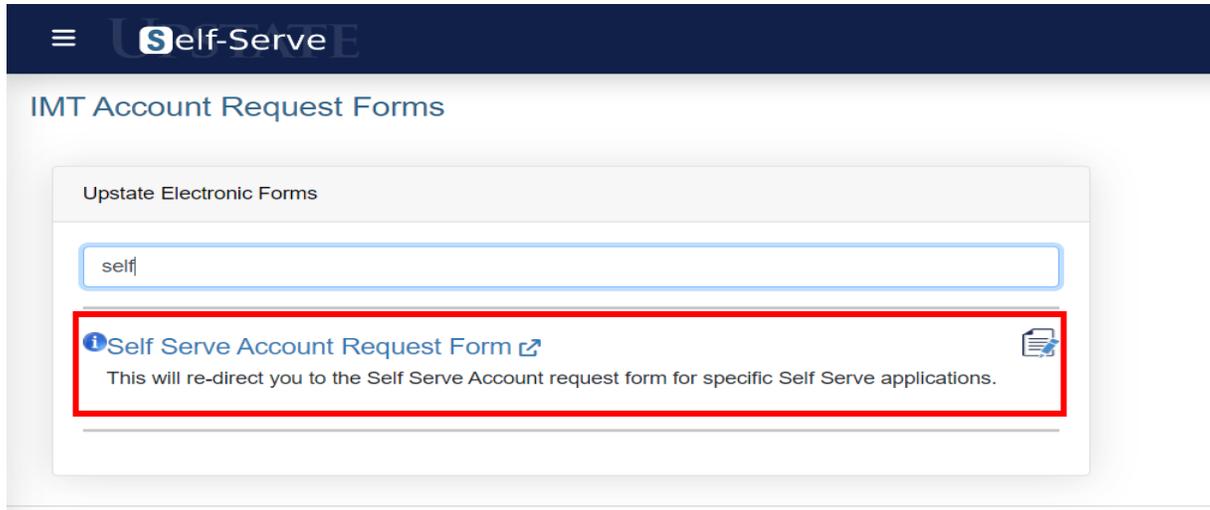
STEP 3:

Login, go to Quick Links, and click on IMT Account Request Forms

The screenshot shows the Quick Links section of the Upstate Ipage dashboard. The Quick Links are organized into two columns: Upstate and SUNY. The Upstate column includes links for Back Office, IMT Account Request Forms (highlighted with a red box), iPage, and Job Shadow Preceptor Sign-Up. The SUNY column includes links for Research Foundation and SUNY Home Page. The top of the dashboard shows a notification bell with a red circle containing the number 3, a book icon, and a user profile icon with a gear.

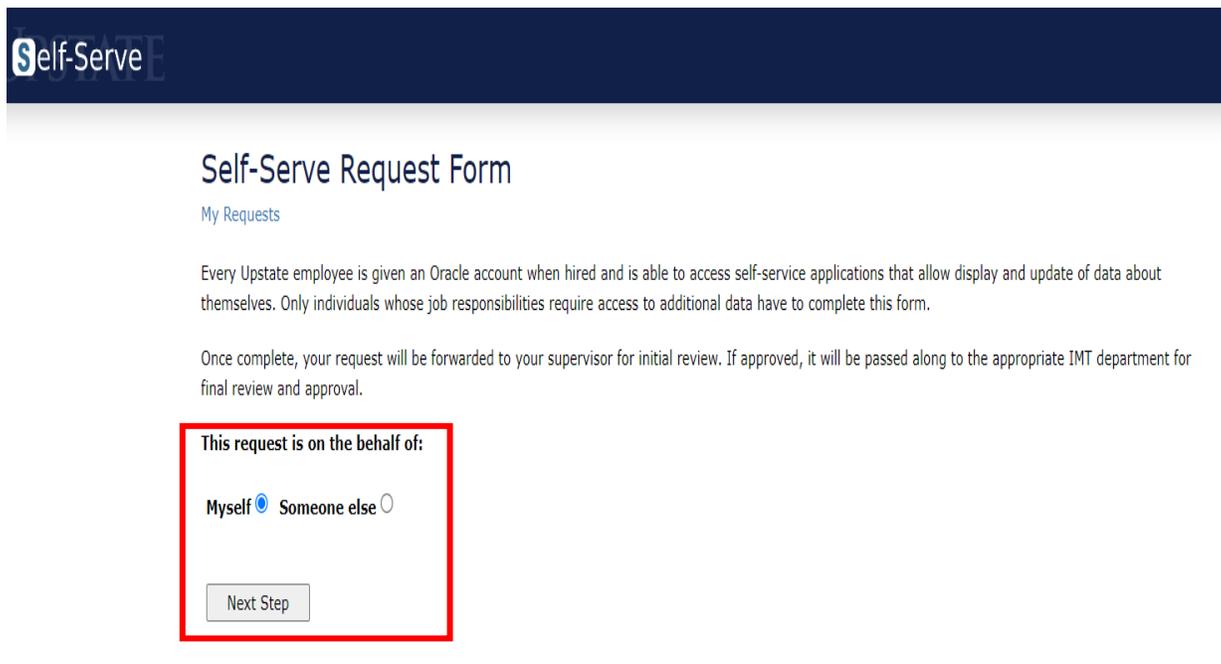
STEP 4:

Filter search for the “Self-Serve Account Request Form” and select hyperlink.



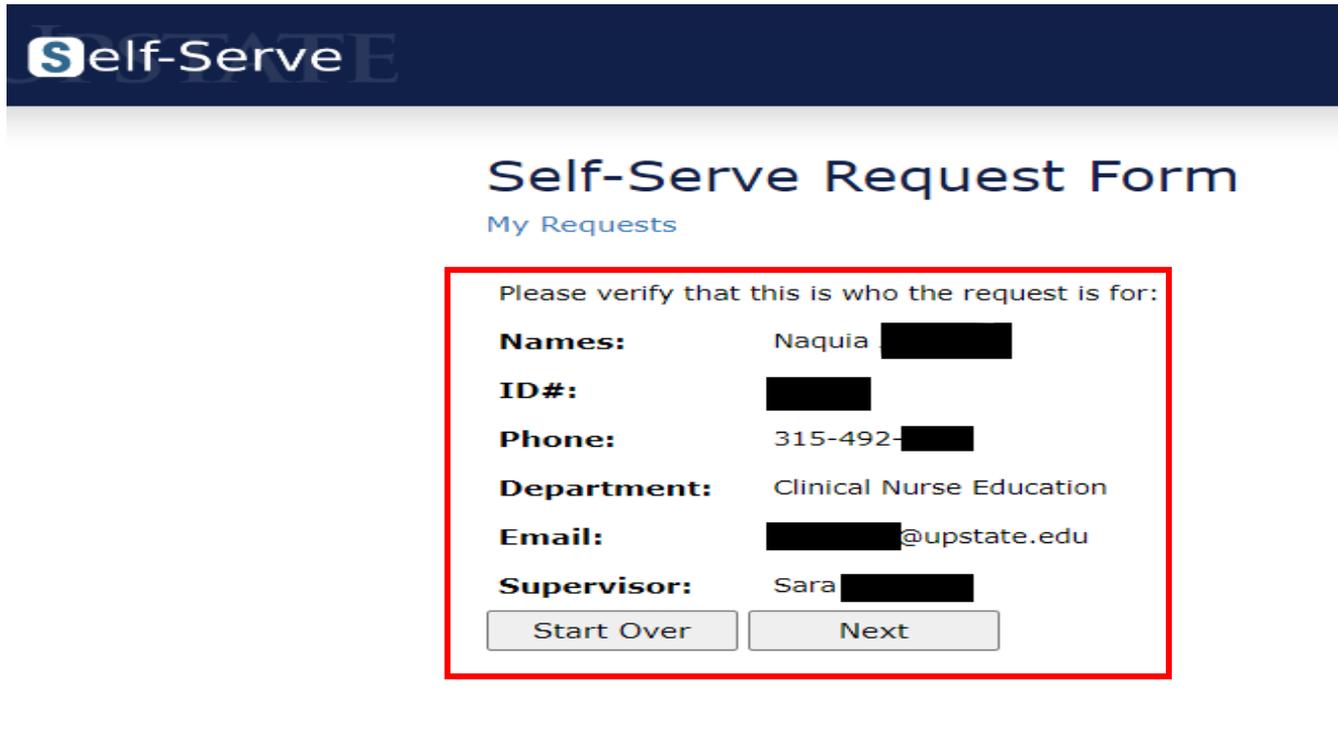
STEP 5:

Select “Myself” or “Someone else” if you are submitting the form on behalf of another individual, then select “Next step”.



STEP 6:

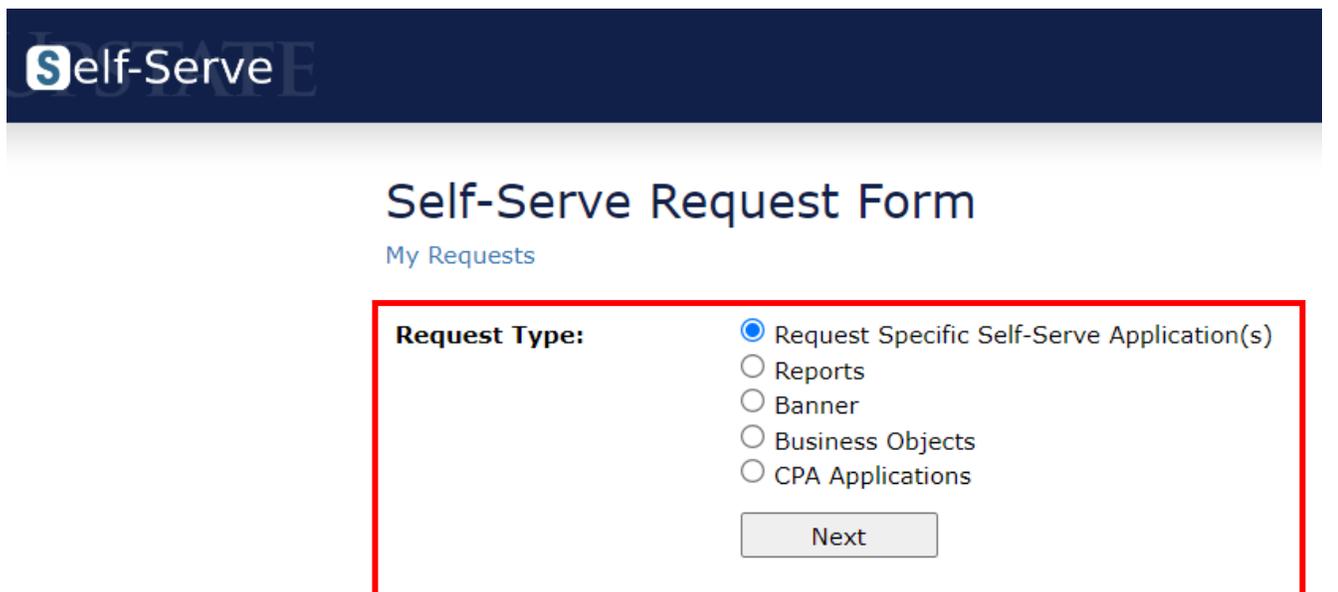
Verify information, select “Next”.



The screenshot shows the 'Self-Serve Request Form' interface. At the top left is the 'Self-Serve' logo. Below it, the title 'Self-Serve Request Form' is displayed in a large blue font, with 'My Requests' in a smaller blue font underneath. A red rectangular box highlights a verification section. Inside this box, the text reads: 'Please verify that this is who the request is for:'. Below this text are several fields: 'Names:' with the value 'Naquia [redacted]', 'ID#:' with a redacted value, 'Phone:' with the value '315-492-[redacted]', 'Department:' with the value 'Clinical Nurse Education', 'Email:' with a redacted value followed by '@upstate.edu', and 'Supervisor:' with the value 'Sara [redacted]'. At the bottom of the red box are two buttons: 'Start Over' and 'Next'.

STEP 7:

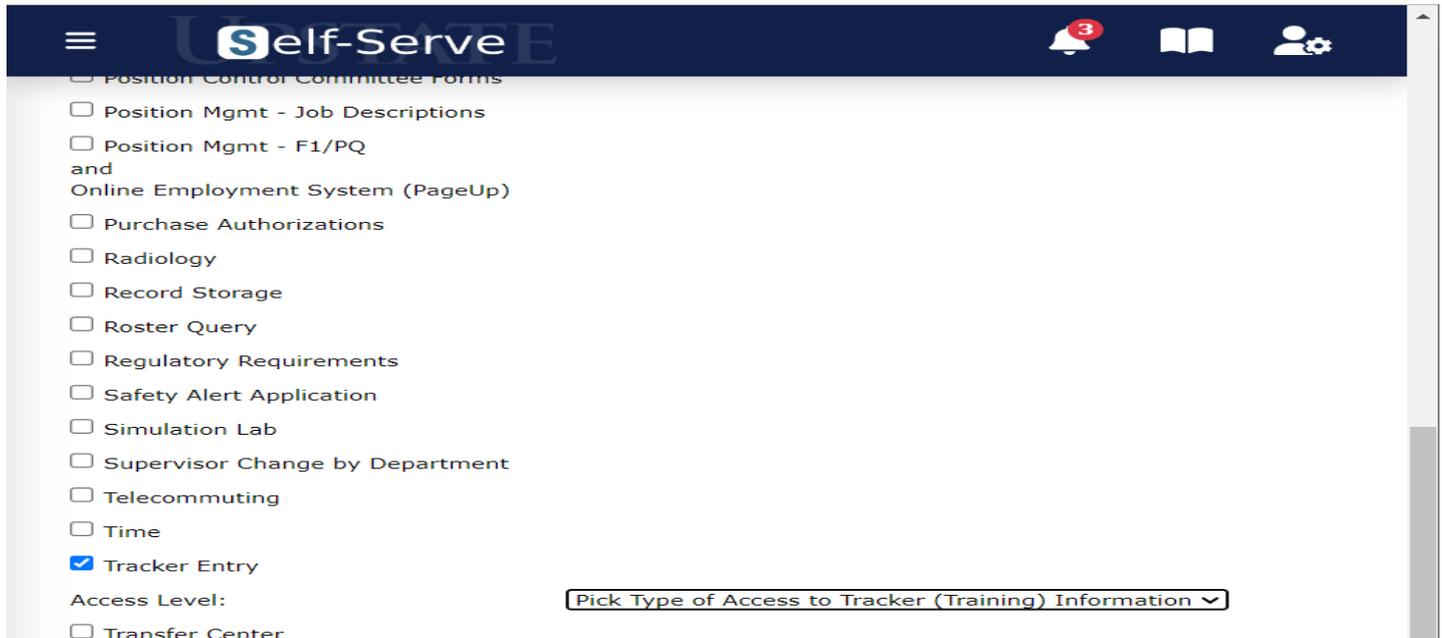
Select “Request Specific Self-Serve Application(s)” and select “Next” to continue.



The screenshot shows the 'Self-Serve Request Form' interface. At the top left is the 'Self-Serve' logo. Below it, the title 'Self-Serve Request Form' is displayed in a large blue font, with 'My Requests' in a smaller blue font underneath. A red rectangular box highlights a selection section. Inside this box, the text reads: 'Request Type:'. Below this text are five radio button options: 'Request Specific Self-Serve Application(s)' (which is selected), 'Reports', 'Banner', 'Business Objects', and 'CPA Applications'. At the bottom of the red box is a 'Next' button.

STEP 8:

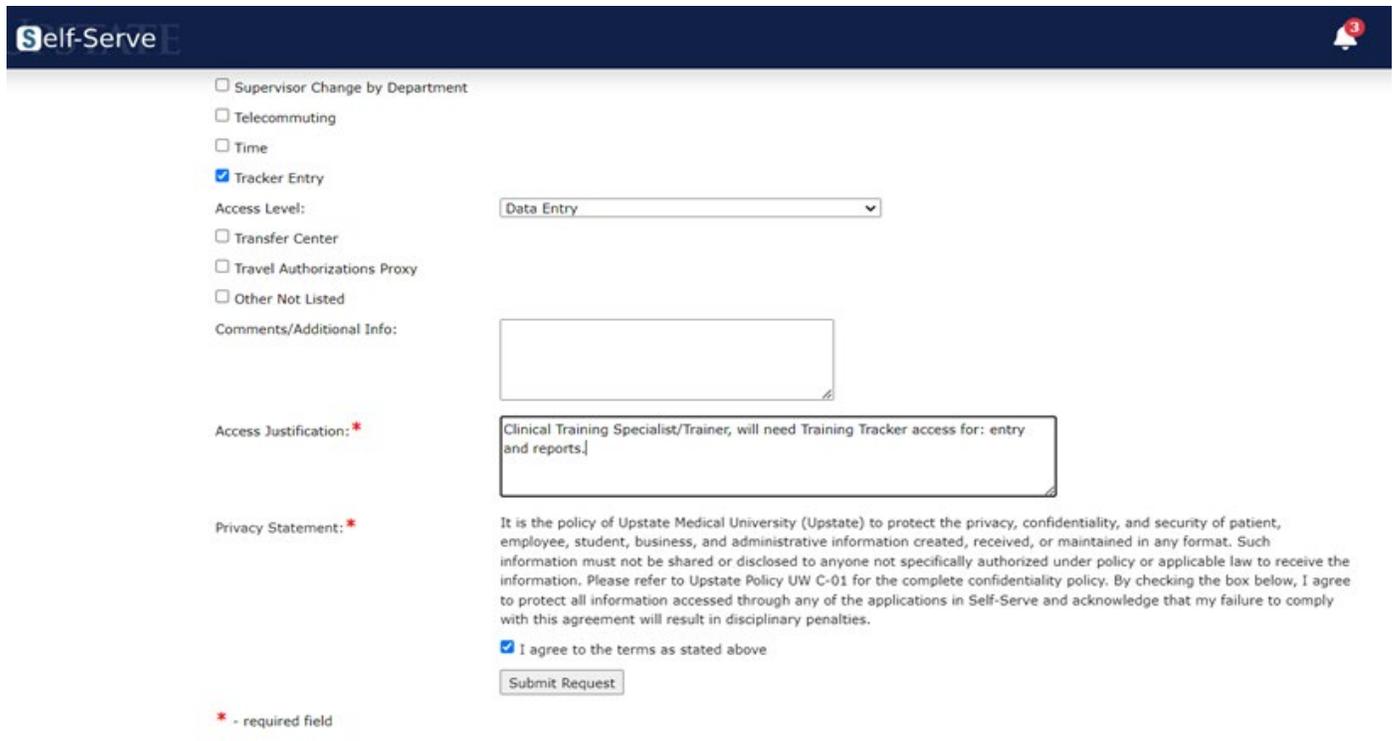
Scroll to bottom of list- Tracker Entry



STEP 9:

Include “Data Entry” Access level, complete all required fields, and submit request.

CTS/Trainer Access Justification example



Super User Mandatory Skills Access Justification example

Supervisor Change by Department

Telecommuting

Time

Tracker Entry

Access Level:

Data Entry ▼

Transfer Center

Travel Authorizations Proxy

Other Not Listed

Comments/Additional Info:

Access Justification: *

Super User for Mandatory Skills, will need Training Tracker entry access