

## 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 is a navigation bar with tabs: IPAGE, ALL STAFF, STUDENTS, FACULTY, RESEARCHERS, HEALTHCARE PROVIDERS, ADMINISTRATORS/MANAGERS, and CAREERS @ UPSTATE. Below this is a blue banner with links: Labor Pool Sign-Up, Covid-19 Information, Hospital Visitor Guidelines, and Wellbeing & Mental Health Resources. The main content area is divided into sections. On the left, under 'COVID RELATED LINKS', are three red buttons: Upload Vaccine Information, Self-Report COVID-19 Test/FAQs, and Employee/Student Health Portal. Below this is the 'APPLICATIONS' section, which contains a grid of application tiles. The 'Self Serve' tile, featuring a person icon, is highlighted with a red border. Other tiles include Outlook, Kronos, IMT / Epic Resources, Clinical Launch Pad, Vocera, My Upstate, Brightspace, and MyAccounts. To the right of the applications is the 'INTRA DASHBOARD' section. It includes an 'ER STATUS' box with updates on DT Adult (ED Surge Plan), DT PEDS (Normal / Open), and CC (Normal / Open). It also features status boxes for HOSPITAL STATUS (Yellow), INCIDENT COMMAND (Normal), and HELIPAD STATUS (Open), each with a timestamp and a 'More' link.

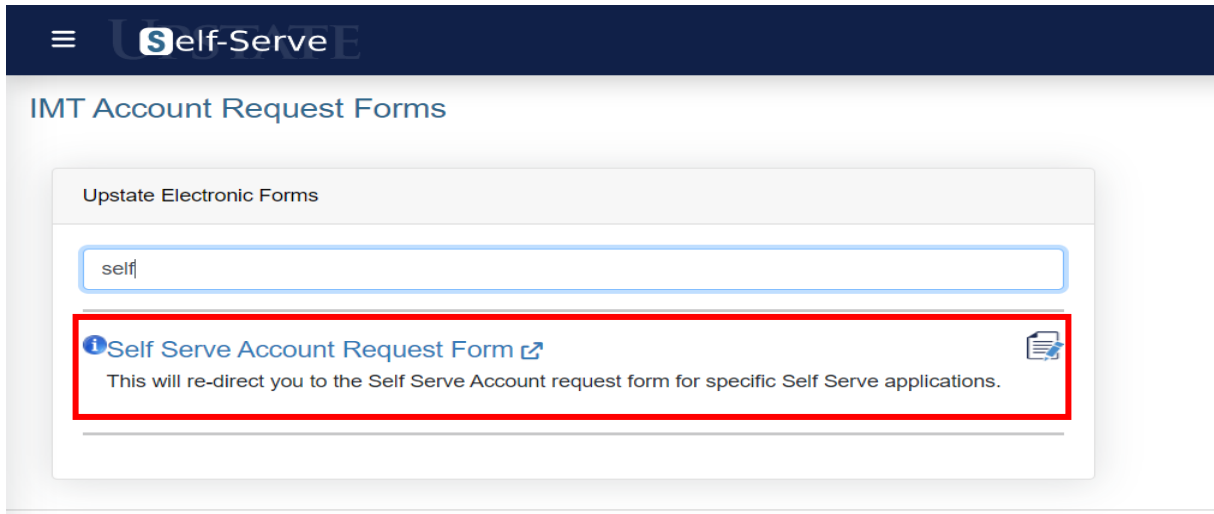
### STEP 3:

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

The screenshot shows the 'Quick Links' section of the Upstate Ipage dashboard. At the top is a dark blue header bar with a notification bell icon (showing 3 notifications), a book icon, and a user profile icon with a gear. Below the header is a white box labeled 'Quick Links'. Inside this box, there are two columns of links. The left column is titled 'Upstate' and contains four links: Back Office, IMT Account Request Forms (highlighted with a red border), iPage, and Job Shadow Preceptor Sign-Up. The right column is titled 'SUNY' and contains two links: Research Foundation and SUNY Home Page. Each link is preceded by a small blue square icon.

**STEP 4:**

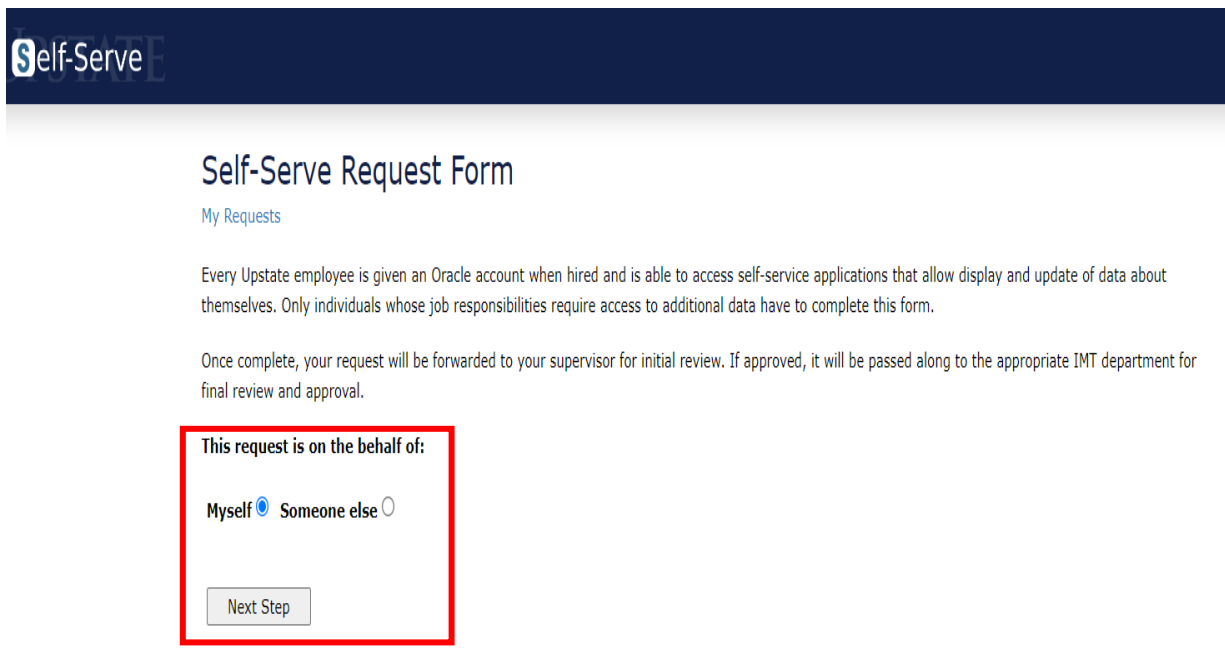
**Filter search for the “Self-Serve Account Request Form” and select hyperlink.**



The screenshot shows the 'Upstate Self-Serve' portal. Under the heading 'IMT Account Request Forms', there is a section titled 'Upstate Electronic Forms'. A search bar contains the text 'self'. Below the search bar, a result is highlighted with a red box. The result is titled 'Self Serve Account Request Form' with an external link icon. Below the title, it says 'This will re-direct you to the Self Serve Account request form for specific Self Serve applications.' There is also a document icon to the right of the text.

**STEP 5:**

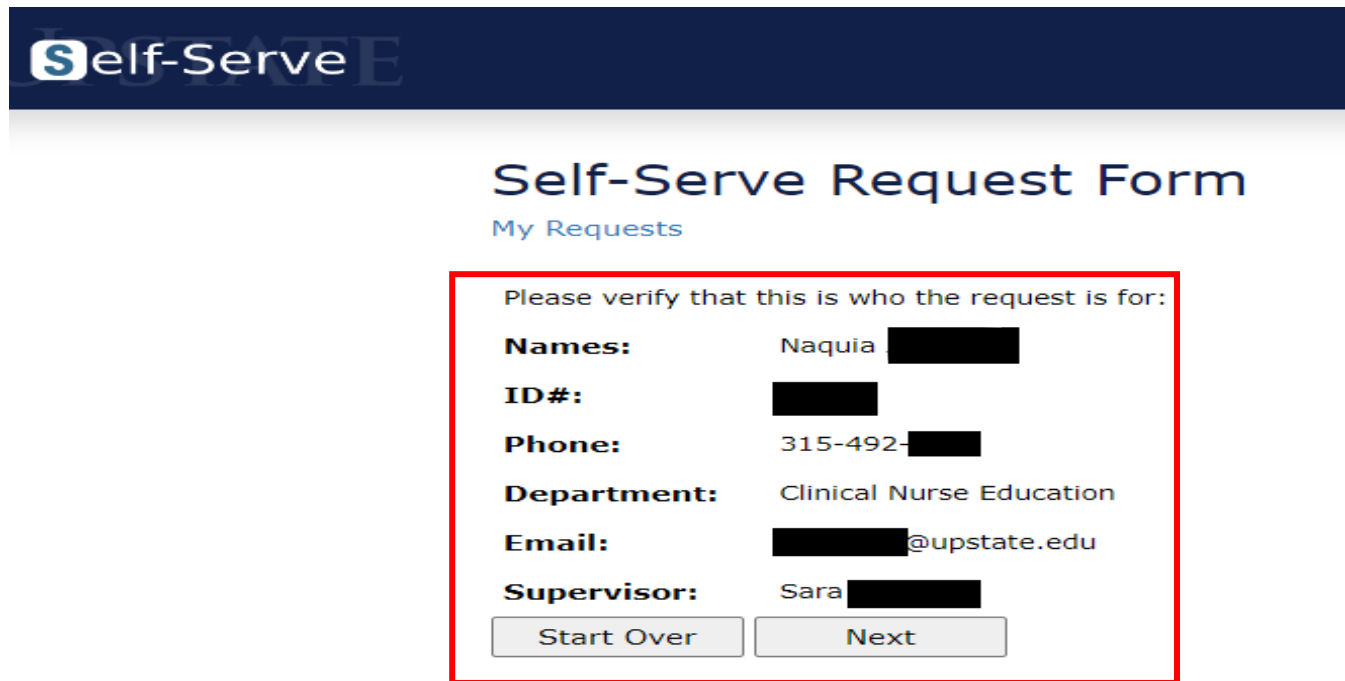
**Select “Myself” or “Someone else” if you are submitting the form on behalf of another individual, then select “Next step”.**



The screenshot shows the 'Self-Serve Request Form' page. At the top, there is a 'Self-Serve' header. Below it, the title 'Self-Serve Request Form' is displayed, followed by a link 'My Requests'. The main content area contains two paragraphs of text. The first paragraph states: 'Every Upstate employee is given an Oracle account when hired and is able to access self-service applications that allow display and update of data about themselves. Only individuals whose job responsibilities require access to additional data have to complete this form.' The second paragraph states: 'Once complete, your request will be forwarded to your supervisor for initial review. If approved, it will be passed along to the appropriate IMT department for final review and approval.' Below the text, there is a section titled 'This request is on the behalf of:' with two radio button options: 'Myself' (which is selected) and 'Someone else'. At the bottom of this section, there is a 'Next Step' button. The entire section containing the radio buttons and the 'Next Step' button is highlighted with a red box.

**STEP 6:**

Verify information, select “Next”.



The screenshot shows the 'Self-Serve Request Form' with the title 'My Requests'. A red box highlights the verification section. The text inside the box reads: 'Please verify that this is who the request is for:'. Below this, the following information is displayed: 'Names: Naquia [redacted]', 'ID#: [redacted]', 'Phone: 315-492-[redacted]', 'Department: Clinical Nurse Education', 'Email: [redacted]@upstate.edu', and 'Supervisor: Sara [redacted]'. At the bottom of the box are two buttons: 'Start Over' and 'Next'.

**Self-Serve**

## Self-Serve Request Form

My Requests

Please verify that this is who the request is for:

**Names:** Naquia [redacted]

**ID#:** [redacted]

**Phone:** 315-492-[redacted]

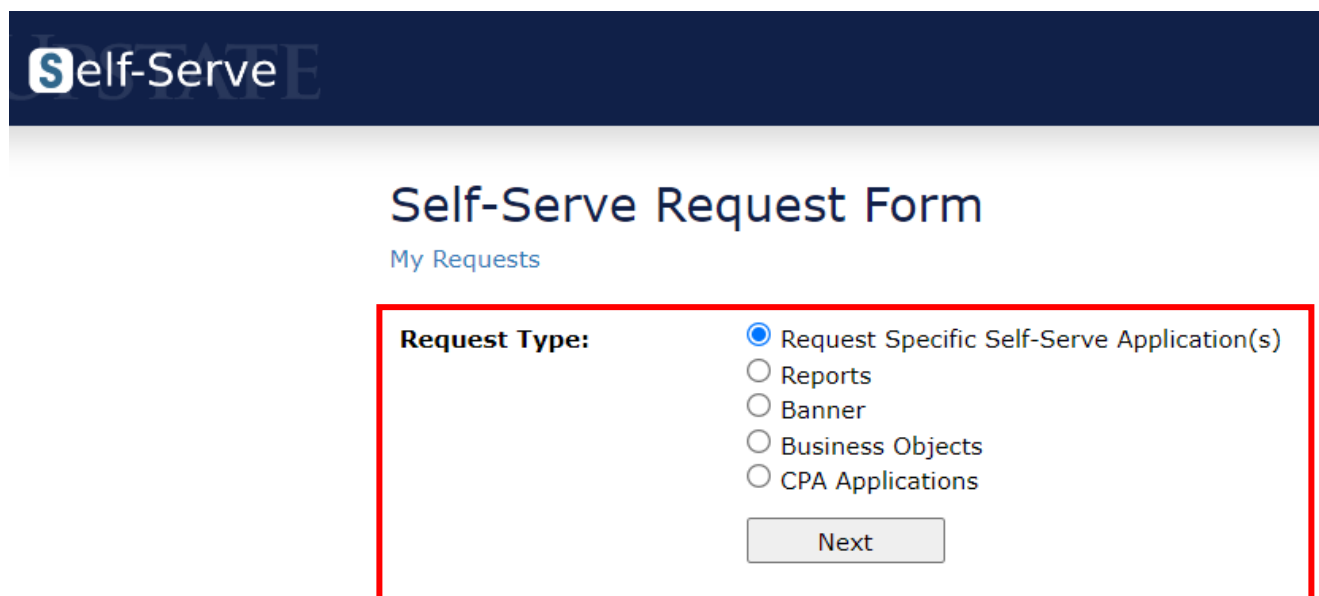
**Department:** Clinical Nurse Education

**Email:** [redacted]@upstate.edu

**Supervisor:** Sara [redacted]

**STEP 7:**

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



The screenshot shows the 'Self-Serve Request Form' with the title 'My Requests'. A red box highlights the 'Request Type' section. The text inside the box reads: 'Request Type:'. Below this, there 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 box is a 'Next' button.

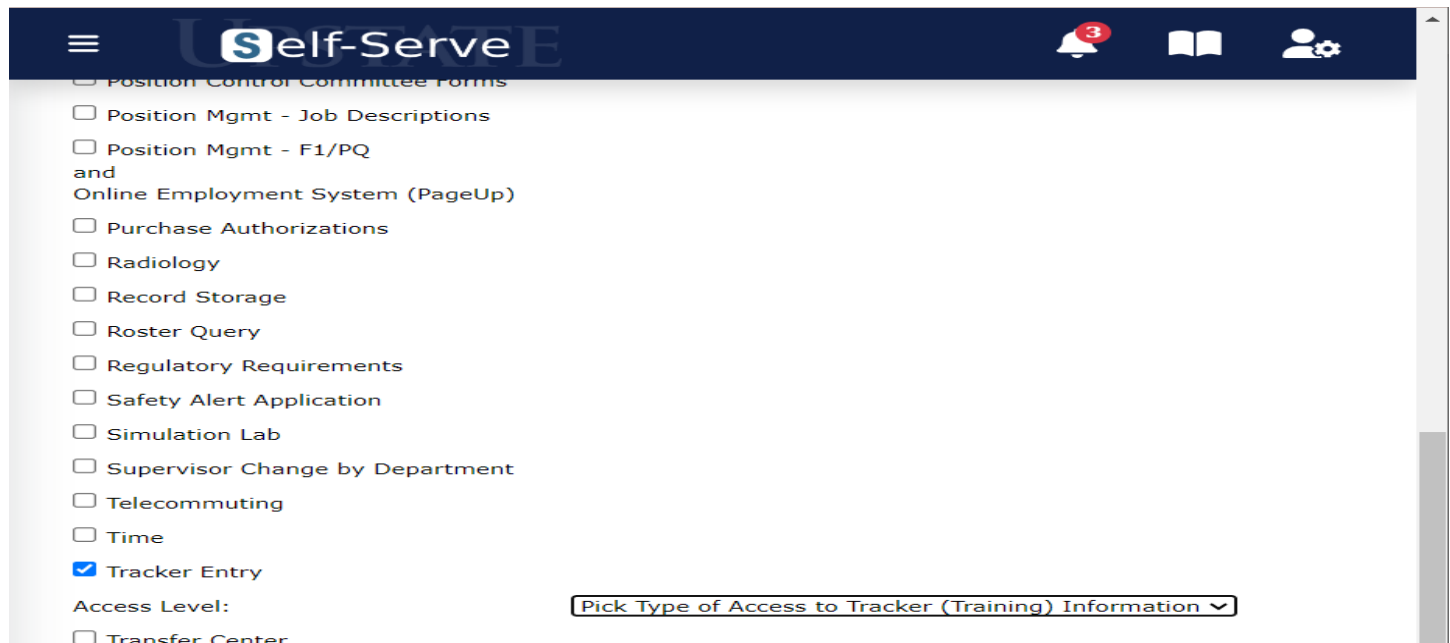
**Self-Serve**

## Self-Serve Request Form

My Requests

**Request Type:**

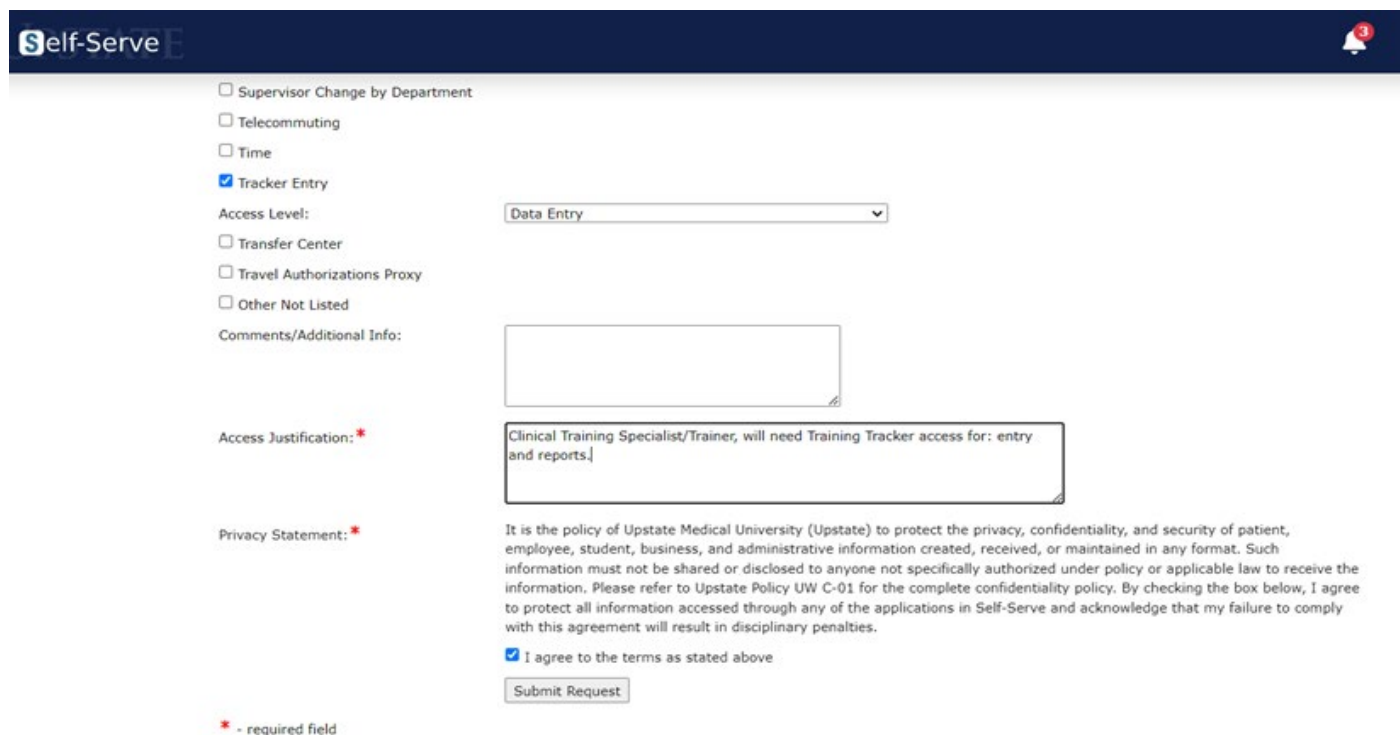
- ☒ Request Specific Self-Serve Application(s)
- ☐ Reports
- ☐ Banner
- ☐ Business Objects
- ☐ CPA Applications

**STEP 8:****Scroll to bottom of list- Tracker Entry**

The screenshot shows the 'Self-Serve' application interface. On the left is a list of menu items, each with a checkbox. 'Tracker Entry' is checked. To the right of the list is a dropdown menu labeled 'Pick Type of Access to Tracker (Training) Information'.

- ☐ Position Control Committee Forms
- ☐ Position Mgmt - Job Descriptions
- ☐ Position Mgmt - F1/PQ and Online Employment System (PageUp)
- ☐ Purchase Authorizations
- ☐ Radiology
- ☐ Record Storage
- ☐ Roster Query
- ☐ Regulatory Requirements
- ☐ Safety Alert Application
- ☐ Simulation Lab
- ☐ Supervisor Change by Department
- ☐ Telecommuting
- ☐ Time
- ☒ Tracker Entry
- ☐ Transfer Center

Access Level: Pick Type of Access to Tracker (Training) Information ▼

**STEP 9:****Include “Data Entry” Access level, complete all required fields, and submit request.****CTS/Trainer Access Justification example**

The screenshot shows the 'Self-Serve' application request form. The 'Tracker Entry' checkbox is checked, and the 'Access Level' dropdown is set to 'Data Entry'. The 'Access Justification' field contains the text: 'Clinical Training Specialist/Trainer, will need Training Tracker access for: entry and reports.' The 'Privacy Statement' section includes a checkbox for 'I agree to the terms as stated above', which is checked. A 'Submit Request' button is at the bottom.

☐ 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: \*

Privacy Statement: \*

It is the policy of Upstate Medical University (Upstate) to protect the privacy, confidentiality, and security of patient, employee, student, business, and administrative information created, received, or maintained in any format. Such information must not be shared or disclosed to anyone not specifically authorized under policy or applicable law to receive the information. Please refer to Upstate Policy UW C-01 for the complete confidentiality policy. By checking the box below, I agree to protect all information accessed through any of the applications in Self-Serve and acknowledge that my failure to comply with this agreement will result in disciplinary penalties.

☒ I agree to the terms as stated above

\* - required field

## 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