

# Columbia University P&S and SON Students – Requests for Epic Training and Access

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The following document describes the process by which medical and nursing school students have Epic access requested for them, a learning management system account created, training assigned, and ultimately gain access to the Epic electronic medical record system. This replaces any former process and must be adhered to for expedited access to required systems.

## Step One: Submit an eSAF with NYP

Follow Columbia's process to submit an eSAF request:

**Note:** If a request is for 10 or more users, a multi-user submission template (Excel spreadsheet) can be submitted in a single eSAF request. If you need a copy of this template, contact [ColumbiaCWIDSupport@nyp.org](mailto:ColumbiaCWIDSupport@nyp.org).

1. The HR Manager/Department Admin accesses the eSAF system at <https://nypres.service-now.com/nyp-portal/>
2. Select **Request System Access**
3. Under Categories, select **IT Services > Account Management**  
*If a user does not see this option, they should contact [ColumbiaCWIDSupport@nyp.org](mailto:ColumbiaCWIDSupport@nyp.org)*
4. Select **Windows Domain Login**  
*If a user does not see this option, they should contact [ColumbiaCWIDSupport@nyp.org](mailto:ColumbiaCWIDSupport@nyp.org)*
5. Use the following field values:
  - Employee Status: New (Doesn't have NYP CWID or NYP CWID is Inactive)
  - Employee Type: Other
  - Organization: Columbia
  - Manager: Please specify the individual responsible for managing the user's Epic training  
*If the manager cannot be found, please contact [ColumbiaCWIDSupport@nyp.org](mailto:ColumbiaCWIDSupport@nyp.org)*
6. Select **Add to Cart**
7. Select the **Cart** button on the top right corner of the page and select **Checkout**
8. Select **Proceed to Checkout**
9. Include the note **"User requires access to Saba for Epic training"**
10. If this is a bulk request (multi-user):
  - Select the **Paperclip** and attach the completed bulk template
  - Select **+(Optional)** under Special Instructions information and **specify "Bulk Request – Please see attachment"**
11. If the user already has a UNI:
  - Click **+(Optional)** under Special Instructions information and **specify "User has a UNI:" and include their UNI**
12. Select **Checkout**



## Step Two: NewYork-Presbyterian Processes the eSAF Request

1. Once the new account is created, the CWID and password will be put into the ServiceNow ticket
2. An email will be automatically sent to the eSAF submitter with the CWID and password
3. Once the user is added to Saba (the NYP Learning Center), the manager from the eSAF will be added as the manager of the individual in Saba, this provides the ability to enroll the individual in training and monitor their completion of it

## Step Three: Epic Training Enrollment for Medical and Nursing Students

### Option 1: Manager Enrolls Student in Epic Training

1. The manager listed on the eSAF form logs into Saba at <https://nyp.sabacloud.com>
2. Click the **three stacked lines** in the top left corner of the page and select **My Team**
3. Select the individual to register them for training
4. Select **Add Learning**
5. Select **Add to Plan** and click **Next**
6. Search for the appropriate curriculum by its name, either:
  - Epic: View-Only for Medical Students
  - Epic: View-Only for Nursing Students
7. Select the **arrow** under the Action column and select **Add to Plan**
8. Follow the instructions linked below to enroll the user into the specific classes within the curriculum you've assigned:  
[https://epictogetherny.org/Training/Documents/Epic\\_Training\\_Enrollment\\_Instructions\\_for\\_Managers\\_and\\_Program\\_Directors.pdf](https://epictogetherny.org/Training/Documents/Epic_Training_Enrollment_Instructions_for_Managers_and_Program_Directors.pdf)

### Option 2: Student Self-Enrollment

1. You may elect to have students self-enroll in their required training programs, which is done by you providing the direct links to the learning program applicable for the student type:
  - Epic: Ambulatory for Medical Students:  
[https://nyp.sabacloud.com/Saba/Web\\_spf/NA3P1PRD006/common/learningeventdetail/curra0000000008041](https://nyp.sabacloud.com/Saba/Web_spf/NA3P1PRD006/common/learningeventdetail/curra0000000008041)
  - Epic: Inpatient for Medical Students:  
[https://nyp.sabacloud.com/Saba/Web\\_spf/NA3P1PRD006/common/learningeventdetail/curra0000000008040](https://nyp.sabacloud.com/Saba/Web_spf/NA3P1PRD006/common/learningeventdetail/curra0000000008040)
  - Epic: View-Only for Nursing Students:  
[https://nyp.sabacloud.com/Saba/Web\\_spf/NA3P1PRD006/common/learningeventdetail/curra0000000007121](https://nyp.sabacloud.com/Saba/Web_spf/NA3P1PRD006/common/learningeventdetail/curra0000000007121)
  - If a user requires training on Connect (Epic's patient portal), they should also enroll in Epic Connect eLearning:  
[https://nyp.sabacloud.com/Saba/Web\\_spf/NA3P1PRD006/common/ledetail/0000034956/latestversion](https://nyp.sabacloud.com/Saba/Web_spf/NA3P1PRD006/common/ledetail/0000034956/latestversion)
2. When the student accesses the corresponding link the curriculum page loads after they've logged in with their assigned CWID and password



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3. The student selects **Register** and when the page refreshes they select **Complete Registration**
4. They are presented with a confirmation of their enrollment and select **Close**
5. The page then shows the class they are enrolled in, and when they are ready to begin training they select **View Summary**
6. The list of assigned e-learning lessons displays, they will select **Launch** for each lesson, in the order they are presented

## Step Four: Epic Provisioning and Access

1. When the user completes training, automated processes run to add the user to the active directory groups required to see the Epic environments in the NYP Citrix Storefront (App Store)
2. The Epic Security team is notified that the user has completed training and creates the user's account in Epic and enables it for login. Access to Epic is typically provisioned 12-24 hours following training completion.
  - Contact [epic-security@med.cornell.edu](mailto:epic-security@med.cornell.edu) for assistance with Epic system access inquiries

