

JIRA Visitor Application User Guide

Updated September 2023

Department of Surgery | Office of Faculty Affairs |
Department of Human Resources

Version Control

Version	Author	Date	Description
1	td2248	2/13/2019	Initial draft
2	td2248	9/11/2023	Updated to included Visiting Student Intern application and new financial fields

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Introduction

The purpose of this manual is to guide users in submitting visitor applications through the automated system developed by The Department of Surgery, The Office of Faculty Affairs and The Department of Human Resources. This system automates the workflow and approval process that each application must follow.

Visitor Application Types

Research

Purpose/Definition/Duration:

To observe research activities, duties, tasks and processes. Research visitors cannot exceed periods of three months. Periods longer than 3 months requires approval from OFA.

Submit to:

OFA

Requirements:

NYP Space	Period	Special Indicators	Criminal Background Check	Medical Attestation	Medical Surveillance	Drug Test
No	Up to 3 months	No	No	No	No	No
No	Up to 3 months	Yes	No	Yes	No	No
No	Greater than 3 months*	Yes	No	No	Yes	No
Yes	Up to 3 months	Yes/No	Yes	Yes	No	No
Yes	Greater than 3 months*	Yes/No	Yes	No	Yes	Yes

*Requires OFA approval

**Not required for minors

Workflow:



Clinical

Purpose/Definition/Duration:

To observe clinical activities, duties, tasks and processes. Clinical visitors cannot exceed periods of three months. Periods longer than 3 months requires approval from OFA.

Submit to:

OFA

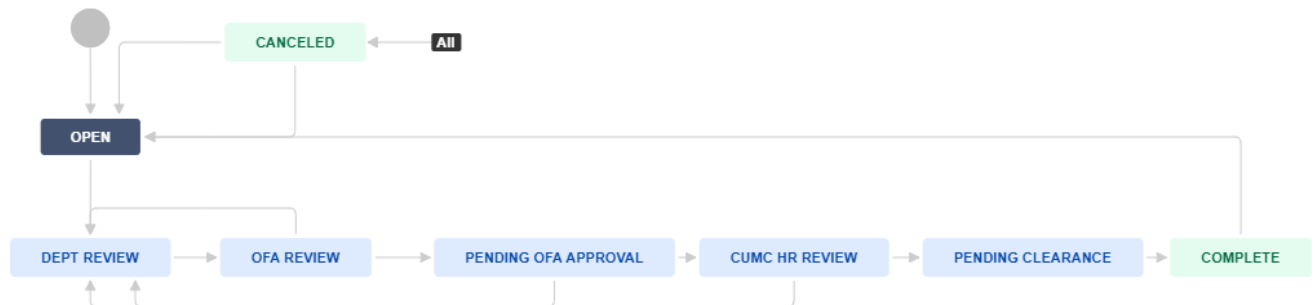
Requirements:

NYP Space	Period	Special Indicators	Criminal Background Check	Medical Attestation	Medical Surveillance	Drug Test
No	Up to 3 months	Yes	Yes**	Yes	No	No
No	Greater than 3 months*	Yes	Yes**	No	Yes	No
Yes	Up to 3 months	Yes	Yes	Yes	No	No
Yes	Greater than 3 months*	Yes	Yes	No	Yes	Yes

*Requires OFA approval

**Not required for minors

Workflow:



Administrative

Purpose/Definition:

To observe administrative/clerical support duties, tasks and processes. Administrative visitors cannot exceed periods of one year.

Submit to:

CUIMC HR

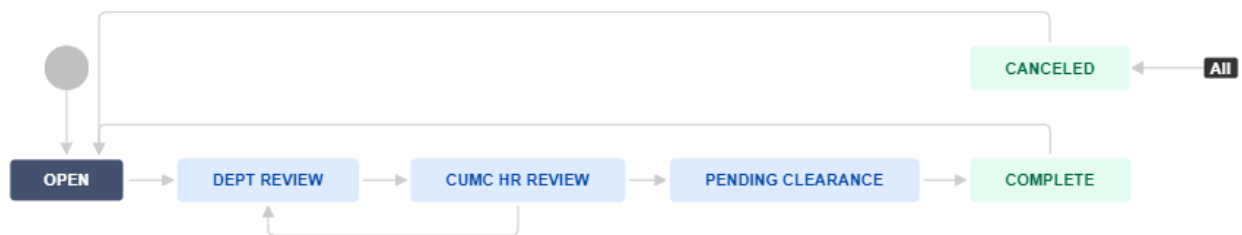
Requirements:

NYP Space	Period	Special Indicators	Criminal Background Check	Medical Attestation	Medical Surveillance	Drug Test
No	Up to 1 year	No	Yes**	No	No	No
No	3 months or less	Yes	Yes**	Yes	No	No
No	between 3 months and 1 year	Yes	Yes**	No	Yes	Yes
Yes	3 months or less	Yes/No	Yes	Yes	No	No
Yes	between 3 months and 1 year	Yes/No	Yes	No	Yes	Yes

**Requires OFA approval*

***Not required for minors*

Workflow:



Visiting Student Intern

Purpose/Definition/Duration:

Undergraduate or graduate students (domestic or international) who are enrolled in a non-Columbia University degree program and would like to visit Columbia to conduct research training with a PI. Applications are reviewed and approved by OFA.

Submit to:

OFA

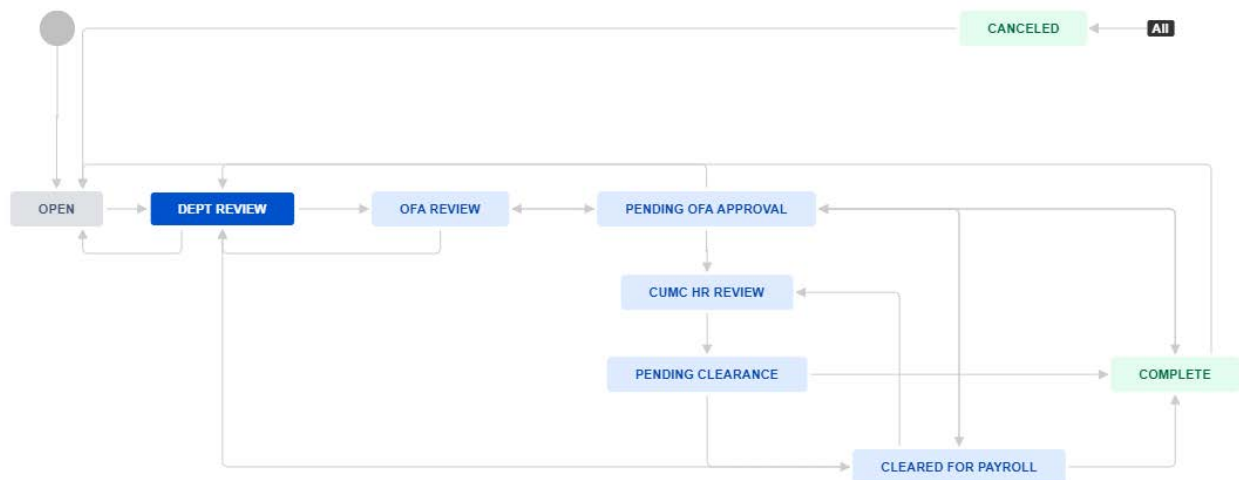
Requirements:

NYP Space	Period	Special Indicators	Criminal Background Check	Medical Attestation	Medical Surveillance	Drug Test
No	Up to 3 months	No	No	No	No	No
No	Up to 3 months	Yes	No	Yes	No	No
No	Greater than 3 months*	Yes	No	No	Yes	No
Yes	Up to 3 months	Yes/No	Yes	Yes	No	No
Yes	Greater than 3 months*	Yes/No	Yes	No	Yes	Yes

*Requires OFA approval

**Not required for minors

Workflow:



JIRA User Roles and Workflow Status Descriptions

User Role	Level	Function	Workflow Status	Description
Requester	Department	The Requester is responsible for creating tickets by entering the required information into the visitor application form. Once complete, the Requester submits the ticket for departmental approval.	OPEN DEPT REVIEW	Tickets are set to Open Workflow Status once the Requester completes the data entry into the visitor application form. When the ticket is ready for departmental approval, the Requester updates the Workflow Status to DEPT REVIEW.
Department Approver	Department	The Department Approver reviews and approves tickets submitted by the Requester.	DEPT REVIEW OFA REVIEW	The Department Approver can review tickets once they are in DEPT REVIEW Workflow Status. The Department Approver grants approval by updating the Workflow Status to OFA REVIEW.
OFA Reviewer	OFA	The OFA Reviewer reviews the ticket for accuracy and to ensure it meets University guidelines and policies. If the ticket is ready for OFA approval, the OFA REVIEWER submits the ticket to the OFA APPROVER.	OFA REVIEW PENDING OFA APPROVAL	The OFA Reviewer can begin reviewing tickets once they are moved to OFA REVIEW Workflow Status. If no issues are identified, the OFA Reviewer submits the ticket to the OFA APPROVER by updating the Workflow Status to PENDING OFA APPROVAL.
OFA Approver	OFA	The OFA Approver provides another layer of review before granting final approval.	PENDING OFA APPROVAL COMPLETE CUMC HR REVIEW	The OFA Approver can begin reviewing tickets once they are moved to PENDING OFA APPROVAL Workflow Status. If no other requirements are necessary, then the OFA Approver can complete the process by updating the Workflow Status to COMPLETE. If additional requirements must be met, such as background checks or medical clearance, then the OFA Approver updates the Workflow Status to CUMC HR REVIEW.

User Role	Level	Function	Workflow Status	Description
CUMC HR	CUMC HR	CUMC HR reviews tickets to ensure additional requirements are met in order to provide clearance.	CUMC HR REVIEW PENDING CLEARANCE COMPLETE	CUMC HR can begin reviewing tickets once they are in CUMC HR REVIEW Workflow Status. If it is determined that additional requirements must be met, then the Workflow Status is updated to PENDING CLEARANCE until such requirements are met. If additional requirements have been met or not necessary, then CUMC HR updates the Workflow Status to COMPLETE. A Workflow Status of COMPLETE closes the ticket.
Payroll	Payroll	Process for payroll. Visiting Student Intern applications only.	Cleared for Payroll	Indicates all the necessary paperwork has been prepared and is ready for Payroll to process.
All Roles	Department, OFA, CUMC HR	All roles can cancel tickets once it is determined that an application is inactive, expired or no longer continuing with the approval process.	CANCELED	Similar to COMPLETE, a Workflow Status of CANCELED closes the ticket.

JIRA User Guide

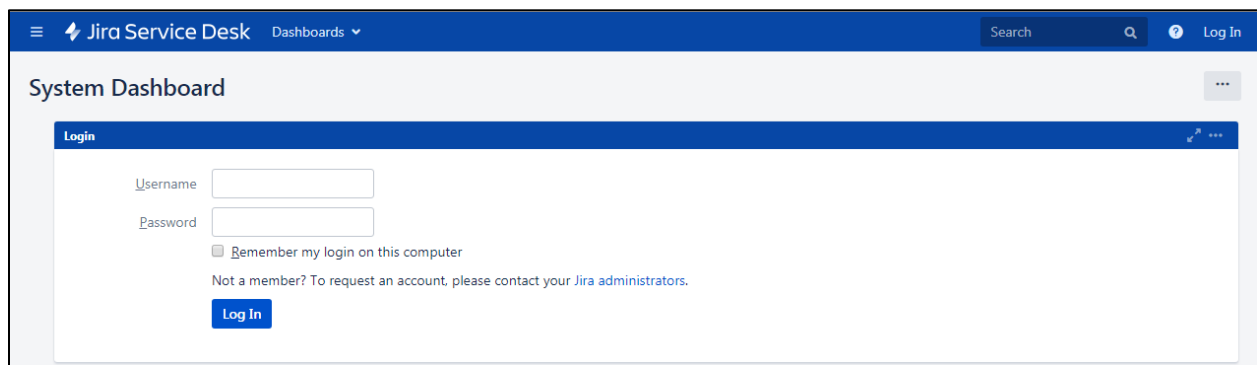
New User Requests

Access for new users is authorized and requested by department managers. Managers submit requests to CUIMC HR by emailing cumchr@cumc.columbia.edu. Email requests should include the user's name, UNI, title, and user role.

Log-In

Once access is granted, CUIMC HR will notify the requesting manager and new user. The credentials to access the system are the same as the credentials used to access the user's pc/exchange account.

URL: <https://jira.surgery.columbia.edu/secure/Dashboard.jspa>



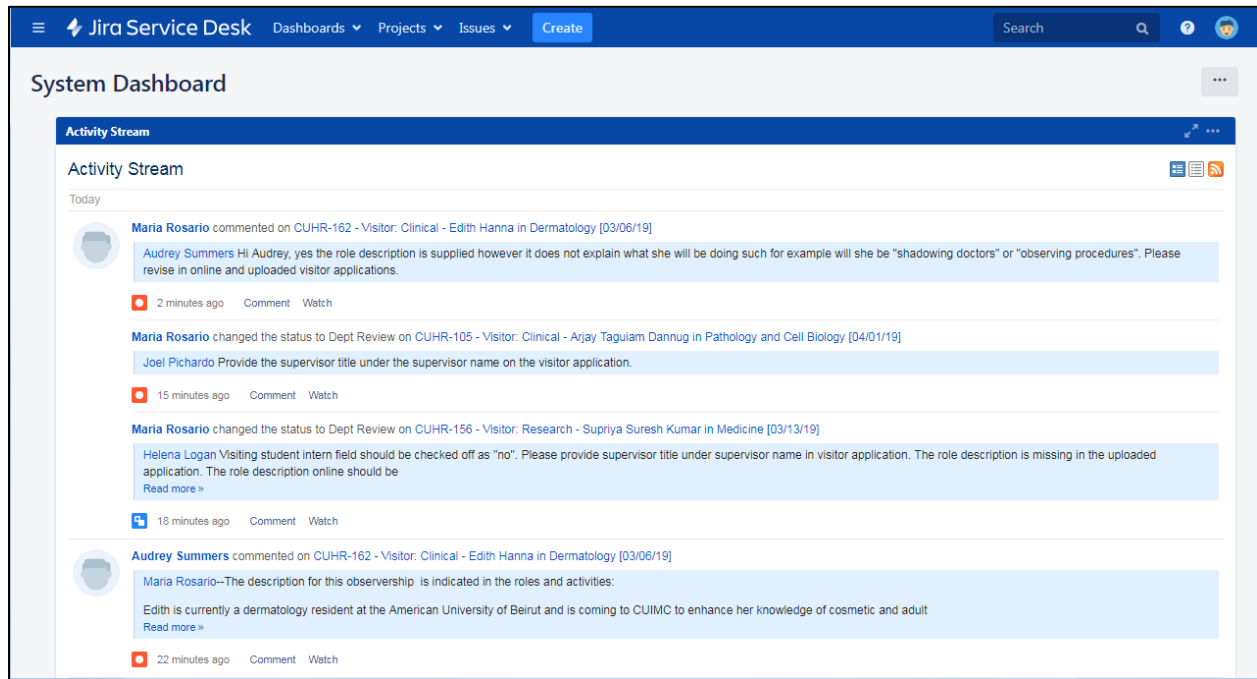
The screenshot shows the Jira Service Desk login interface. At the top, there is a navigation bar with the Jira logo, 'Jira Service Desk', and 'Dashboards'. A search bar and a 'Log In' link are also visible. The main content area is titled 'System Dashboard' and contains a 'Login' form. The form has two text input fields labeled 'Username' and 'Password'. Below these fields is a checkbox labeled 'Remember my login on this computer'. Underneath the checkbox, there is a link that says 'Not a member? To request an account, please contact your Jira administrators.' At the bottom of the form is a blue 'Log In' button.

Username: UNI

Password: PC/Exchange Email Password

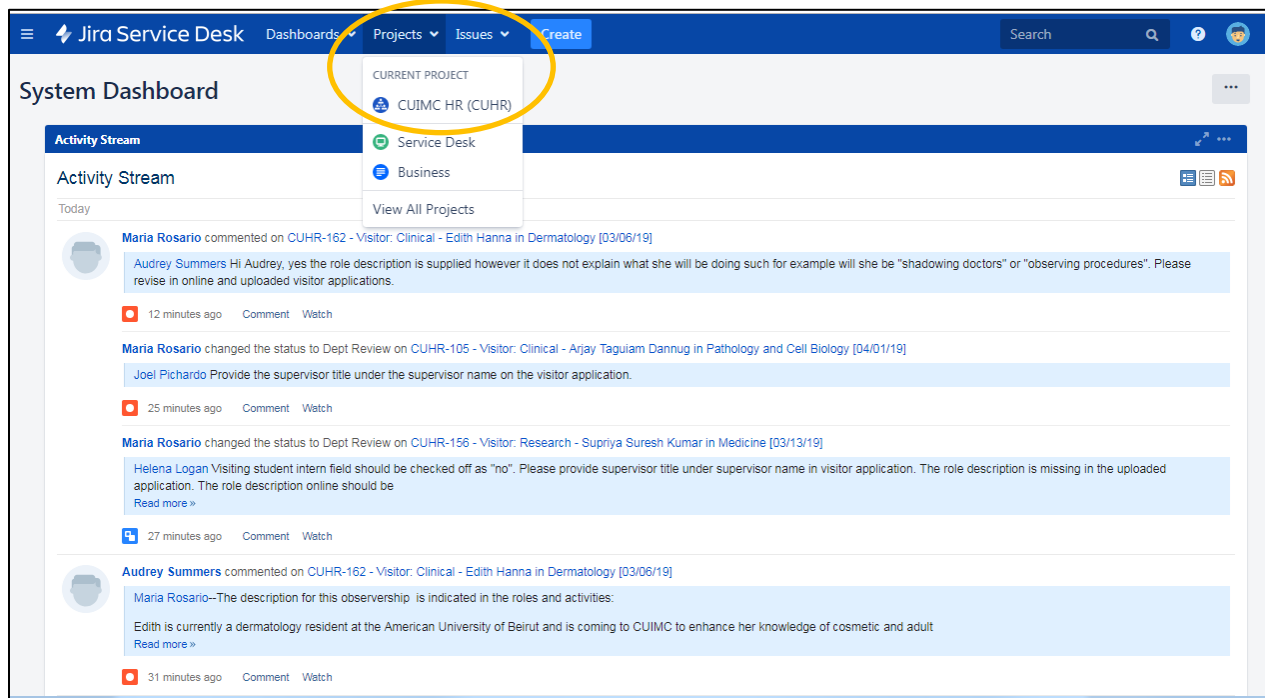
Project Navigation

Upon log-in, the System Dashboard will appear:



The screenshot shows the Jira Service Desk System Dashboard. The top navigation bar includes "Jira Service Desk", "Dashboards", "Projects", "Issues", and a "Create" button. The main content area is titled "System Dashboard" and features an "Activity Stream" section. The activity stream shows several updates from Maria Rosario and Audrey Summers regarding visitor applications and status changes for various projects like CUHR-162, CUHR-105, and CUHR-156. Each update includes a timestamp, a "Comment" link, and a "Watch" link.

From the top menu, click Project → CUIMC HR (CUHR)



This screenshot is similar to the first one but shows the "Projects" dropdown menu open. The menu items are "CURRENT PROJECT", "CUIMC HR (CUHR)", "Service Desk", "Business", and "View All Projects". The "CUIMC HR (CUHR)" option is highlighted with a yellow circle. The background activity stream is partially visible behind the menu.

The CUIMC HR Project Page displays all the tickets that have been submitted. Each user will only see the tickets for the department(s) that is defined in their access role.

The **left side menu** displays each queue and the total number of tickets for each. Clicking on one of the queues will display the tickets in the queue in the main frame. The example below shows all the tickets in the **Department** queue.

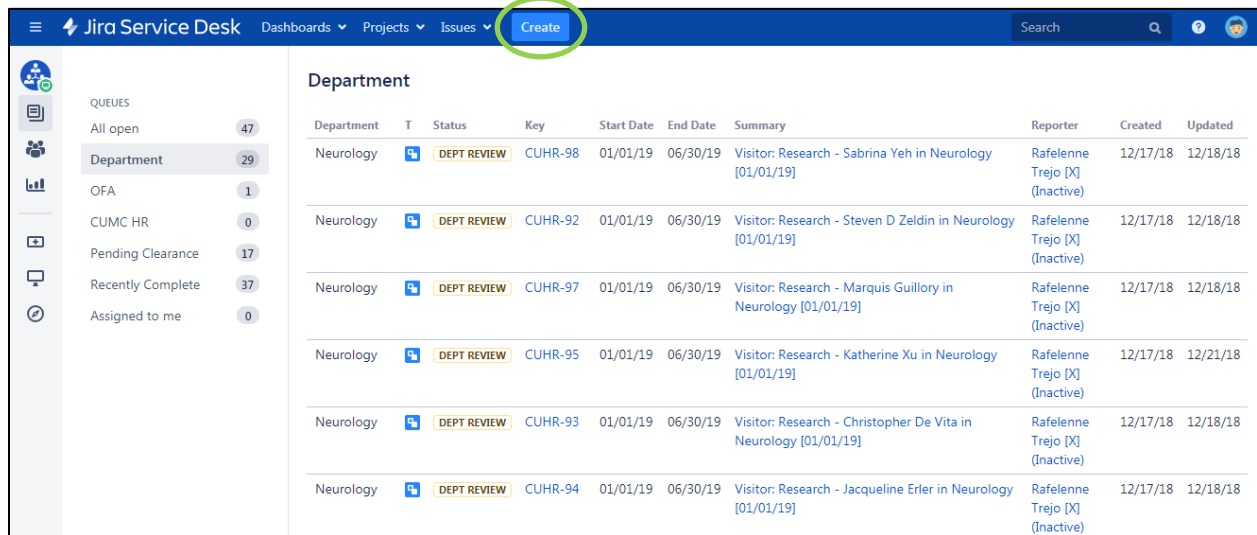
Clicking on any of the links in the **Key** or **Summary** columns will open the ticket. Tickets can now be edited when opened. Please refer to the Add/Edit Information section to edit a ticket.

The screenshot shows the Jira Service Desk interface. On the left, a sidebar titled 'QUEUES' lists several categories: All open (47), Department (29), OFA (1), CUMC HR (0), Pending Clearance (17), Recently Complete (37), and Assigned to me (0). The 'Department' queue is highlighted with a green circle. The main content area is titled 'Department' and displays a table of tickets. The table has columns for Department, T, Status, Key, Start Date, End Date, Summary, Reporter, Created, and Updated. The 'Key' and 'Summary' columns are highlighted with yellow boxes. The first row of the table shows a ticket with Key 'CUHR-98' and Summary 'Visitor: Research - Sabrina Yeh in Neurology [01/01/19]'. The 'Reporter' for this ticket is 'Rafelenne Trejo [X] (Inactive)'. The 'Created' date is '12/17/18' and the 'Updated' date is '12/18/18'.

Department	T	Status	Key	Start Date	End Date	Summary	Reporter	Created	Updated
Neurology		DEPT REVIEW	CUHR-98	01/01/19	06/30/19	Visitor: Research - Sabrina Yeh in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18
Neurology		DEPT REVIEW	CUHR-92	01/01/19	06/30/19	Visitor: Research - Steven D Zeldin in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18
Neurology		DEPT REVIEW	CUHR-97	01/01/19	06/30/19	Visitor: Research - Marquis Guillory in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18
Neurology		DEPT REVIEW	CUHR-95	01/01/19	06/30/19	Visitor: Research - Katherine Xu in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/21/18
Neurology		DEPT REVIEW	CUHR-93	01/01/19	06/30/19	Visitor: Research - Christopher De Vita in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18
Neurology		DEPT REVIEW	CUHR-94	01/01/19	06/30/19	Visitor: Research - Jacqueline Erler in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18

Create Ticket

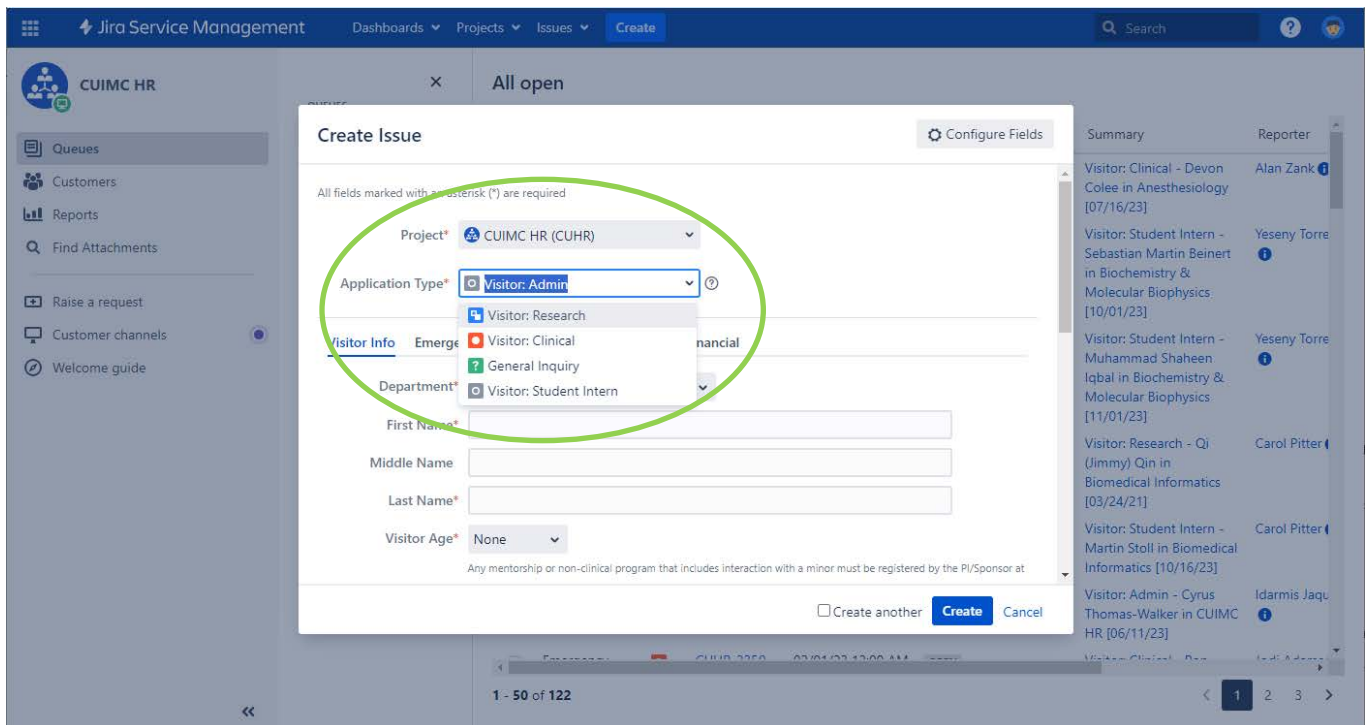
Visitor applications are started by clicking on **Create** located along the top menu



The screenshot shows the Jira Service Desk interface. The top navigation bar includes 'Dashboards', 'Projects', 'Issues', and a highlighted 'Create' button. The main content area displays a table of tickets under the 'Department' view. The table has columns for Department, T, Status, Key, Start Date, End Date, Summary, Reporter, Created, and Updated. The tickets listed are all for the 'Neurology' department and have a status of 'DEPT REVIEW'.

Department	T	Status	Key	Start Date	End Date	Summary	Reporter	Created	Updated
Neurology		DEPT REVIEW	CUHR-98	01/01/19	06/30/19	Visitor: Research - Sabrina Yeh in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18
Neurology		DEPT REVIEW	CUHR-92	01/01/19	06/30/19	Visitor: Research - Steven D Zeldin in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18
Neurology		DEPT REVIEW	CUHR-97	01/01/19	06/30/19	Visitor: Research - Marquis Guillory in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18
Neurology		DEPT REVIEW	CUHR-95	01/01/19	06/30/19	Visitor: Research - Katherine Xu in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/21/18
Neurology		DEPT REVIEW	CUHR-93	01/01/19	06/30/19	Visitor: Research - Christopher De Vita in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18
Neurology		DEPT REVIEW	CUHR-94	01/01/19	06/30/19	Visitor: Research - Jacqueline Erler in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18

In the **Application Type** dropdown, select the visitor application type that is being requested: Research, Admin Clinical or Student Intern (for Visiting Student Interns only).



The screenshot shows the 'Create Issue' form in Jira Service Management. The 'Application Type' dropdown menu is open, showing options: 'Visitor: Admin', 'Visitor: Research', 'Visitor: Clinical', 'General Inquiry', and 'Visitor: Student Intern'. The 'Visitor: Admin' option is selected and highlighted with a green circle. The form also includes fields for Project (CUIMC HR (CUHR)), Department, First Name, Middle Name, Last Name, and Visitor Age (set to None). The 'Create' button is visible at the bottom of the form.

Once an **Application Type** is selected, the form will default to the **Visitor Info** section. Continue to enter the rest of the information being requested. Any field marked with a red asterisk (*) is required.

Create Issue Configure Fields

All fields marked with an asterisk (*) are required

Project* CUIMC HR (CUHR)

Application Type* Visitor: Clinical

Visitor Info | Emergency Contact | Role and Activities | Financial

Department* None

First Name*

Middle Name

Last Name*

Visitor Age* None

Any mentorship or non-clinical program that includes interaction with a minor must be registered by the PI/Sponsor at Columbia's office of the Protection of Minors at www.tinyurl.com/cuprotection. Protection of Minors training is mandatory.

Is the visitor a CU* None student

School*

Program*

Intl. / Domestic* None Visitor

Create another Create Cancel

At the bottom of the Visitor Info section, the **Attachment** field allows for the upload of the paper application or any other supporting documents to the ticket.

Create Issue Configure Fields ▾

Address line 1

Address line 2

City*

State*

Zip Code*

Country (if outside the US)

Home Phone

Work Phone

Affiliation*

Name(s) and Department(s) of family members employed at CU

Attachment

Create another

After completing the Visitor Info section, continue to enter the requested information in the **Emergency Contact** section.

Create Issue Configure Fields ▾

Project* ▾

Issue Type* ▾ ⓘ

Visitor Info **Emergency Contact** Role and Activities Financial

Emergency Contact*
Name

Emergency Contact*
Relationship

Emergency Contact*
Phone

Create another

After completing the Emergency Contact section, continue to enter the requested information in the **Role and Activities** section.

Create Issue Configure Fields ▾

Project*

Issue Type* ⓘ

Visitor Info **Emergency Contact** **Role and Activities** **Financial**

Visitor Role and Activities*

Est. Hours Per Week*

Start Date* ⓘ

End Date* ⓘ

Observing Location

Create another **Create** Cancel

After completing the Role and Activities section, complete the **Financial** section if required. The Financial section is required for non-Columbia students/affiliates.

Create Issue Configure Fields

All fields marked with an asterisk (*) are required

Project* CUIMC HR (CUHR)

Application Type* Visitor: Clinical

Visitor Info Emergency Contact Role and Activities **Financial**

Dept
ARC Dept

Project
ARC Project

Initiative
ARC Initiative

Segment
ARC Segment

PC Business Unit

Activity

Fund

Function

Create another **Create** Cancel

Once all the required information is entered, submit the ticket by clicking the **Create** button on the lower right corner (see screenshot above). The **Create another check box** can be selected before clicking Create if additional applications need to be entered.

WHS Sub-Ticket

A WHS Sub-Ticket must be added for applications that require medical clearance. Once the medical attestation form has been completed, it can be uploaded to the WHS Sub-Ticket and submitted to WHS for review.

To do this:

Open the CUHR ticket that was just created. In the More tab, click on Create linked issue

The screenshot shows a web interface for a CUHR ticket. At the top, there is a dark red navigation bar with a 'Create' button, a search bar, and user profile icons. Below the navigation bar, the ticket title is 'CUHR-1544 Visitor: Student Intern - test test in CUIMC HR [09/29/23]'. A 'Return to queue' link is visible in the top right. The main content area is divided into several sections: 'Details', 'Visitor Info', 'Funding Information', 'Training Component', 'SLAs', 'People', and 'Watchers'. The 'More' dropdown menu is open, showing options like 'Log work', 'Attach files', 'Attach Screenshot', 'Stop watching', 'Watchers', 'Create linked issue' (highlighted), 'Move', 'Link', 'Clone', 'Labels', and 'Delete'. The 'Visitor Info' section contains fields for Department (CUIMC HR), First Name (test), Last Name (test), Visitor Age (Age over 18), Current Degree Program (test), Current Field of Study (test), Intl. / Domestic Visitor (Domestic), Address line 1 (test), City (test), State (ny), and Zip Code (10032). The 'People' section shows the Assignee as Unassigned and the Reporter as Thomas DeLeon. The 'Watchers' section shows a notification to stop watching this issue.

A pop-up window will appear. Update the following fields as follows:


Project*: Workforce Health and Safety


Created issue: relates to


The rest of the fields will auto-populate based on the CUHR ticket


Create linked issue

All fields marked with an asterisk (*) are required

Project*  Workforce Health & Safety (...)

Issue Type*  Workforce Health & Safety ?

Created issue  relates to

Linked issues  CUHR-1544 x +

Search for issues to link to from the one you're creating.



Description





[Create](#)


Scroll down to review that all the required fields are completed. Click Create when done.

You will be taken back to the original CUHR ticket. Scroll down to Issue Links and you will see a link to the WHS ticket under relates to.



Description
None

Attachments  

- Uncategorized**  
No attachments
- Payroll**  
No attachments

Issue Links 

relates to

-  WHS-540 temp value  [OPEN](#)

Dates

Created:	12 minutes ago
Updated:	Just now
Start Date:	09/29/23
End Date:	10/31/23

Activity

All [Comments](#) [Work Log](#) [History](#) [Activity](#)

There are no comments yet on this issue.

Click on the link of the WHS sub-ticket to open the ticket.

WHS-540

temp value

[Return to queue](#)

[Edit](#) [Add comment](#) [Assign](#) [More](#) [Open](#) [Share](#) [Export](#)

Details

Type:	Workforce Health & Safety	Resolution:	Unresolved	SLAs	2d Time to resolution within 2d
Priority:	Medium	Security Level:	Restricted	People	
Labels:	None			Assignee:	Unassigned Assign to me
Department:	CUIMC HR			Reporter:	Thomas De Leon
First Name:	test				cumch r- approv er-hr
Last Name:	test			HR Approval Group:	
Visitor Age:	Age over 18			Watchers:	1 Stop
Supervisor Name:	test				
Supervisor Phone:	test				
NYP Space:	Yes				

Description
None

Attachments ...

Drop files to attach, or [browse](#).

Upload the completed and signed medical attestation in the Attachments box.


Once the file has uploaded, you are now ready to submit the ticket to WHS.

Click the Open tab towards the top of the ticket and then click on Submit to WHS.

Another pop-up box will appear. Select the appropriate check box and then click to Submit to WHS.








Submit to WHS

Visitor Clearance* Observing patient care
 No patient care
 Needed for Animal Laboratory purposes
 Working with animals only (For ICM use only)
(check all that apply)

Attachment* 

Comment Respond to customer Internal comment

Your comment will be visible to customers. Embed attachments to make them visible to customers.

Style ▾ **B** *I* U A ▾ A ▾  ▾  ▾    ▾ + ▾  ▾ 

Congratulations! You just submitted a ticket to WHS.

IMPORTANT: WHS will only respond to questions and inquiries in the Comments section of the WHS sub-ticket. Please type all your questions in there. If WHS needs more information, they will enter the request in the Comments section. Please check that section regularly.

▼ Activity

All Comments Work Log History Activity

There are no comments yet on this issue.

Style ▼ | **B** *I* U A ▼ A° ▼ | 🔗 ▼ U ▼ | ☰ ☰

😊 ▼ + ▼ | 🗨️ ▼ ⬆

[Michelle Bruce](#) What is the status of this ticket? Please let me know if anything is missing/needed. Thank you.

Visual Text

↶ ↷ **Share with customer** Comment internally Cancel

Remember to click on Share with customer to send your message.

Edit Access

Newly created tickets can be found in the Department queue until action is taken to move it through the approval workflow process. As the tickets move through the approval process, they simultaneously move through the different queues. As tickets move through the different queues, edit access is restricted only to the users who have access to the queue. The below table illustrates this by showing the different access levels for each user role.

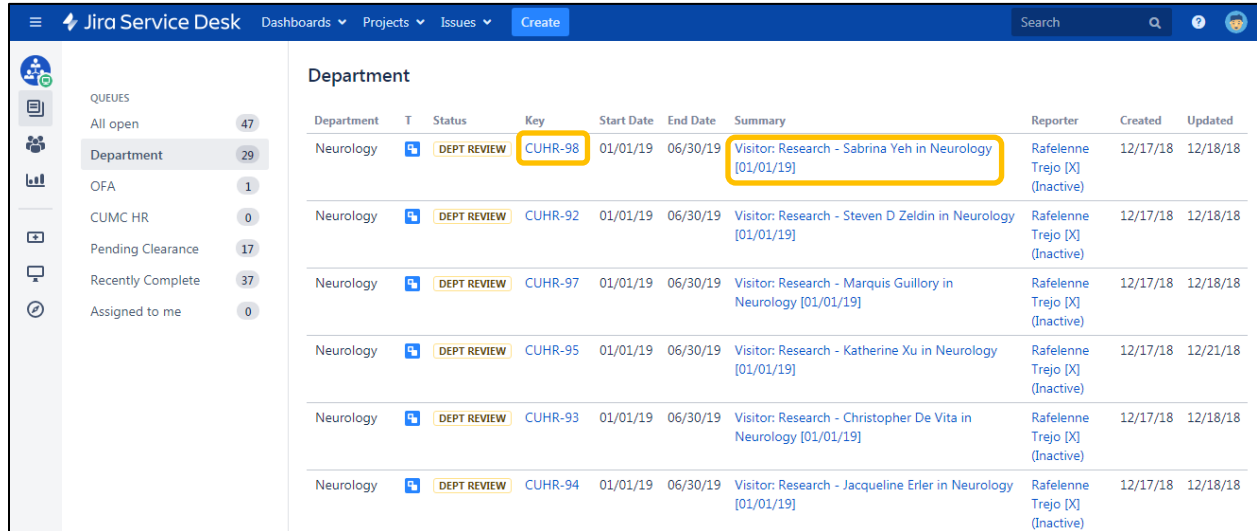
Workflow Status Table:

Workflow Status	User Role Access	Action	Queue
OPEN	Requester	Submit to Dept	Department
DEPT REVIEW	Department Approver	Submit to OFA	Department
OFA REVIEW	OFA Reviewer	Submit for OFA Approval	OFA
PENDING OFA APPROVAL	OFA Approver	Approve*	OFA
PENDING OFA APPROVAL	OFA Approver	Approve for Clearance	OFA
CUMC HR REVIEW	CUMC HR	Begin Review	CUMC HR
PENDING CLEARANCE	CUMC HR	HR Cleared*	Pending Clearance
CLEARED FOR PAYROLL	Payroll	Cleared*	Payroll
COMPLETE			

**Completes the process*

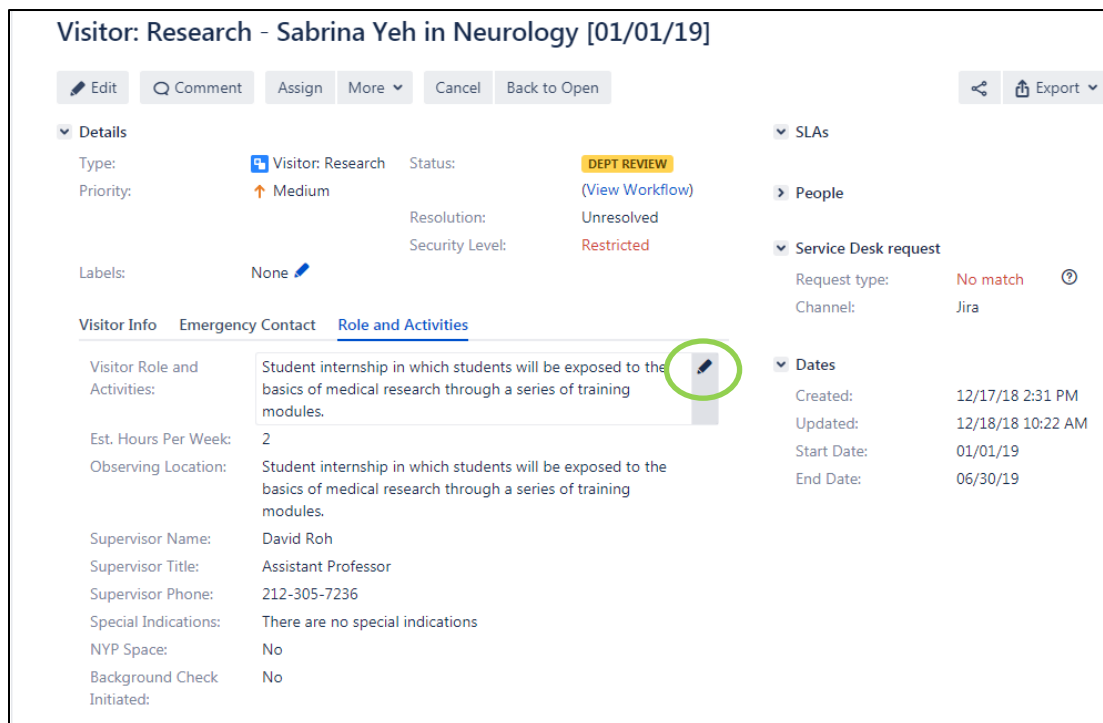
Add/Edit Information

Users can access and edit the information in tickets that are in their queue. For example, a user in the Requester role can access and edit tickets in the Department queue. Clicking on any of the links in the **Key** or **Summary** columns will open the ticket.



Department	T	Status	Key	Start Date	End Date	Summary	Reporter	Created	Updated
Neurology		DEPT REVIEW	CUHR-98	01/01/19	06/30/19	Visitor: Research - Sabrina Yeh in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18
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Neurology		DEPT REVIEW	CUHR-95	01/01/19	06/30/19	Visitor: Research - Katherine Xu in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/21/18
Neurology		DEPT REVIEW	CUHR-93	01/01/19	06/30/19	Visitor: Research - Christopher De Vita in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18
Neurology		DEPT REVIEW	CUHR-94	01/01/19	06/30/19	Visitor: Research - Jacqueline Erler in Neurology [01/01/19]	Rafelenne Trejo [X] (Inactive)	12/17/18	12/18/18

In the opened ticket, click the **edit button** next to the field that requires editing.



Visitor: Research - Sabrina Yeh in Neurology [01/01/19]

[Edit](#) [Comment](#) [Assign](#) [More](#) [Cancel](#) [Back to Open](#) [Export](#)

Details

Type: Visitor: Research Status: **DEPT REVIEW** (View Workflow)

Priority: Medium Resolution: Unresolved

Labels: None Security Level: Restricted

Visitor Info **Emergency Contact** **Role and Activities**

Visitor Role and Activities: Student internship in which students will be exposed to the basics of medical research through a series of training modules.

Est. Hours Per Week: 2

Observing Location: Student internship in which students will be exposed to the basics of medical research through a series of training modules.

Supervisor Name: David Roh

Supervisor Title: Assistant Professor

Supervisor Phone: 212-305-7236

Special Indications: There are no special indications

NYP Space: No

Background Check Initiated: No

SLAs

People

Service Desk request

Request type: No match

Channel: Jira

Dates

Created: 12/17/18 2:31 PM

Updated: 12/18/18 10:22 AM

Start Date: 01/01/19

End Date: 06/30/19

To save or delete edits, click on the **check mark** or **X** respectively.

The screenshot displays the Jira Service Desk interface for a visitor request. The main content area shows the following details:

- CUHR-98** Visitor: Research - Sabrina Yeh in Neurology [01/01/19]
- Details:**
 - Type: Visitor: Research
 - Priority: Medium
 - Status: DEPT REVIEW (View Workflow)
 - Resolution: Unresolved
 - Security Level: Restricted
 - Labels: None
- Visitor Info** | Emergency Contact | Role and Activities
- Visitor Role and Activities:** Student internship in which students will be exposed to the basics of medical research through a series of training modules. (This text is highlighted with a blue selection box, and a small edit menu with a checkmark and an X is circled in green.)
- Est. Hours Per Week:** 2
- Observing Location:** Student internship in which students will be exposed to the basics of medical research through a series of training modules.
- Supervisor Name:** David Roh
- Supervisor Title:** Assistant Professor
- Supervisor Phone:** 212-305-7236
- Special Indications:** There are no special indications
- NYP Space:** No
- Background Check Initiated:** No

On the right side, the **Dates** section shows:

- Created: 12/17/18 2:31 PM
- Updated: 12/18/18 10:22 AM
- Start Date: 01/01/19
- End Date: 06/30/19

Activity Section

The **Activity Section** can be found towards the bottom of an opened ticket. All the activity specific to the ticket is tracked in this section. This section can be accessed by any user in any role with the appropriate department access. The **All tab** will show all the unfiltered activity related to the ticket.

Activity

All Comments Work Log History Activity

Amanda Nolasco created issue - 01/31/19 4:00 PM

Amanda Nolasco made changes - 01/31/19 4:00 PM

Field	Original Value	New Value
HR Approval Group		[cumchr-approver-neurolo
Summary	temp value	Visitor: Research - Samuel in Neurology [02/14/19]

Amanda Nolasco made changes - 01/31/19 4:02 PM

Attachment Gedailovich, Samuel 19.pdf

Amanda Nolasco added a comment - 01/31/19 4:02 PM **REPORTER**

Gedailovich, Samuel 19.pdf

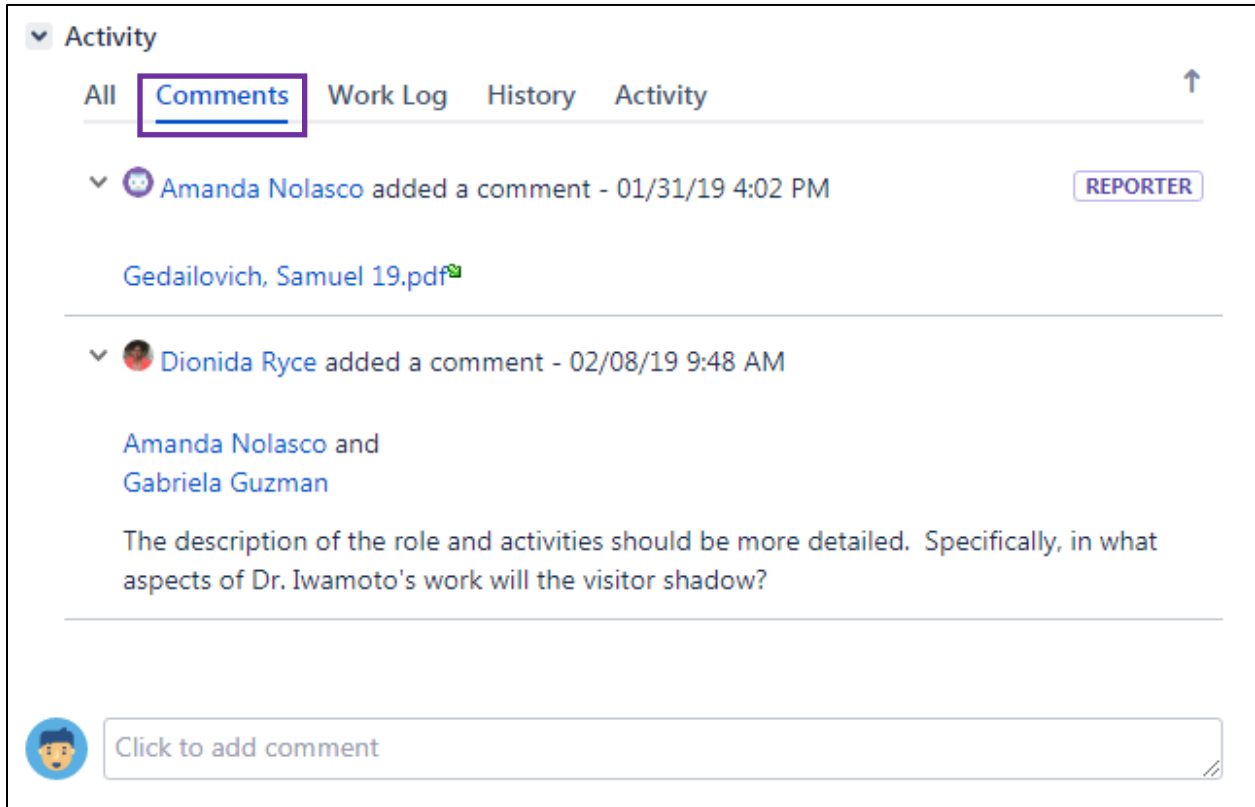
Amanda Nolasco made changes - 01/31/19 4:03 PM

Status	Open [1]	Dept Review [11204]
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Iris Lara made changes - 02/01/19 3:41 PM

Start Date	02/14/19	02/15/19
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The **Comments tab** will display all the comments entered by any user. This tab can be used to provide updates and additional communications to other users. Click in the “Click to add comment” text box to begin a comment. To send a comment to a specific person, preface the comment with an “@” sign and proceed to type the user’s name or UNI and their full name and UNI will appear for the user to select. Once selected, their name will appear in blue font.





The screenshot displays a user interface for an activity feed. At the top, there is a dropdown menu labeled "Activity" with a downward arrow. Below this, there are four tabs: "All", "Comments", "Work Log", and "History". The "Comments" tab is selected and highlighted with a purple border. To the right of the tabs is an upward-pointing arrow. The feed contains two comment entries. The first entry is from "Amanda Nolasco" on 01/31/19 at 4:02 PM, with a "REPORTER" label. The comment text is "Gedailovich, Samuel 19.pdf" with a PDF icon. The second entry is from "Dionida Ryce" on 02/08/19 at 9:48 AM. The comment text is "Amanda Nolasco and Gabriela Guzman" followed by "The description of the role and activities should be more detailed. Specifically, in what aspects of Dr. Iwamoto's work will the visitor shadow?". At the bottom of the feed is a text input field with a placeholder "Click to add comment" and a small icon of a person's head on the left.

The **History tab** will display any changes made to any field or status.


Activity

All Comments Work Log **History** Activity ↑


 Amanda Nolasco created issue - 01/31/19 4:00 PM

 Amanda Nolasco made changes - 01/31/19 4:00 PM


Field	Original Value	New Value
HR Approval Group		[cumchr-approver-neuro]
Summary	temp value	Visitor: Research - Samuel in Neurology [02/14/19]

 Amanda Nolasco made changes - 01/31/19 4:02 PM


Attachment		Gedailovich, Samuel 19.pd
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 Amanda Nolasco made changes - 01/31/19 4:03 PM

Status	Open [1]	Dept Review [11204]
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 Iris Lara made changes - 02/01/19 3:41 PM

Start Date	02/14/19	02/15/19
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 Iris Lara made changes - 02/01/19 3:41 PM

Summary	Visitor: Research - Samuel Gedailovich in Neurology [02/14/19]	Visitor: Research - Samuel in Neurology [02/15/19]
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The **Activity** tab displays the activity in more detail than the History tab.


▼ Activity

All Comments Work Log History **Activity**


📡 ⚙️ ▼

Yesterday


 **Amanda Nolasco** changed the status to Canceled on [GUHR-129 - Visitor: Research - Samuel Gedailovich in Neurology \[02/15/19\]](#) with a resolution of 'Canceled'


 Yesterday

Amanda Nolasco opened [GUHR-129 - Visitor: Research - Samuel Gedailovich in Neurology \[02/15/19\]](#)

 Yesterday

February 08


 **Dionida Ryce** changed the status to Dept Review on [GUHR-129 - Visitor: Research - Samuel Gedailovich in Neurology \[02/15/19\]](#)

 02/08/19 9:48 AM


Dionida Ryce commented on [GUHR-129 - Visitor: Research - Samuel Gedailovich in Neurology \[02/15/19\]](#)


Amanda Nolasco and Gabriela Guzman

The description of the role and activities should be more detailed. Specifically, in what aspects of Dr. Iwamoto's work will the visitor shadow?

 02/08/19 9:48 AM

February 05

 **Gabriela Guzman** changed the status to Pending OFA Approval on [GUHR-129 - Visitor: Research - Samuel Gedailovich in Neurology \[02/15/19\]](#)

 02/05/19 9:55 AM

Cancel Ticket

Status updates of Canceled can occur in two different scenarios:

- 1) A ticket moves through the entire workflow process and is ultimately Approved or HR Cleared.
- 2) A ticket is Canceled by a user.

Similar to Complete, a status of Canceled closes the ticket.

Users can Cancel tickets by clicking on the **Cancel tab** in an open ticket.

CUHR-98

Visitor: Research - Sabrina Yeh in Neurology [01/01/19]

Edit Comment Assign More Cancel Back to Open

Details

Type:	Visitor: Research	Status:	DEPT REVIEW
Priority:	Medium	Resolution:	(View Workflow) Unresolved
Labels:	None	Security Level:	Restricted

Visitor Info Emergency Contact Role and Activities

[View Workflow](#)

In an open ticket, the [View Workflow link](#) can be found under the Status.

CUHR-98

Visitor: Research - Sabrina Yeh in Neurology [01/01/19]

[Edit](#) [Comment](#) [Assign](#) [More](#) [Cancel](#) [Back to Open](#)

▼ **Details**

Type: [Visitor: Research](#) Status: **DEPT REVIEW**
(View Workflow)

Priority: [Medium](#)

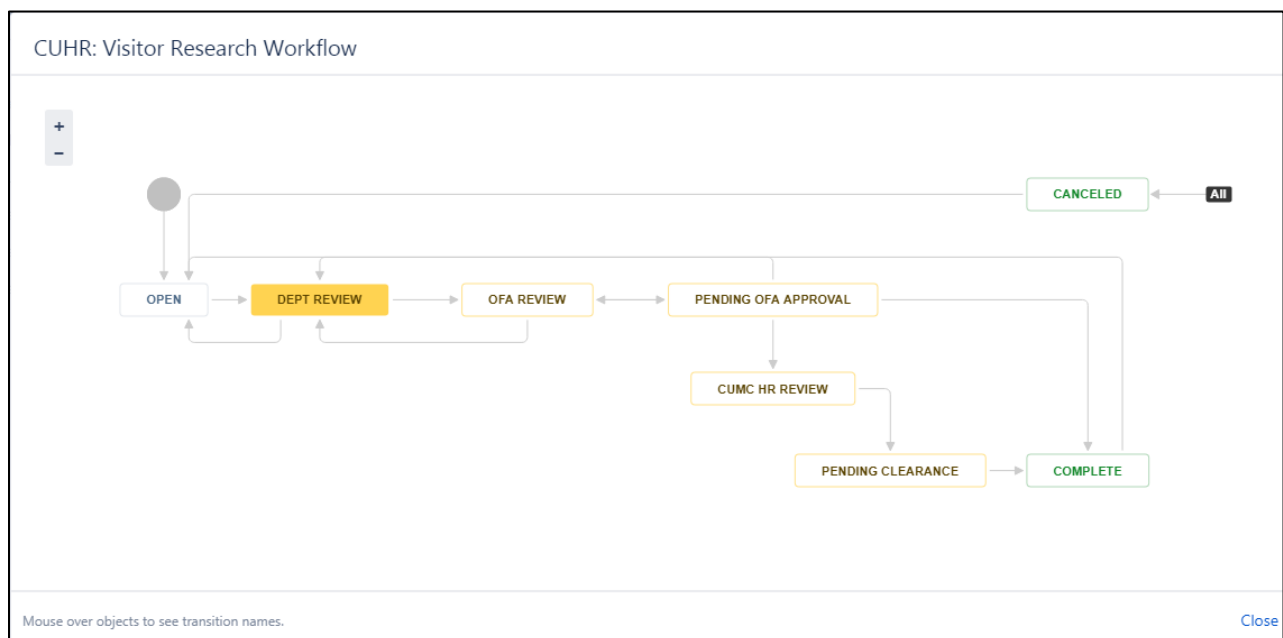
Resolution: Unresolved

Security Level: Restricted

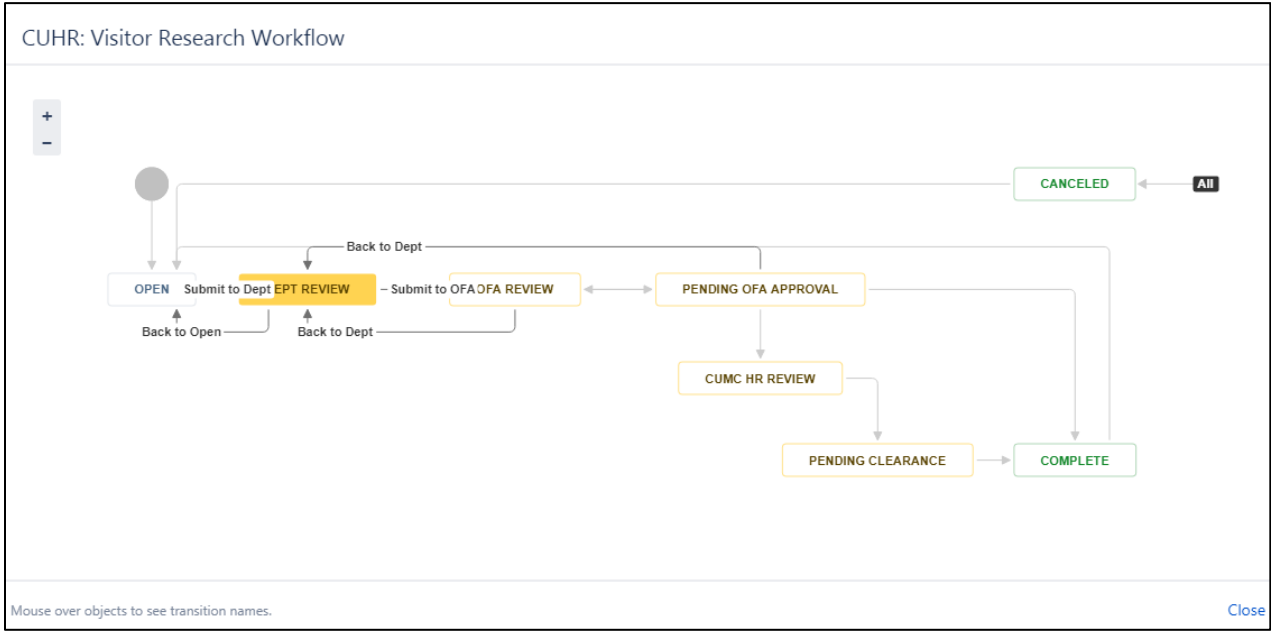
Labels: None

[Visitor Info](#) [Emergency Contact](#) [Role and Activities](#)

Clicking the View Workflow link will pop-up a window that displays the workflow assigned to the ticket.



Hovering the mouse over the Workflow Status will display the actions associated with the directional arrows.



Users can use this feature as a reference tool to forecast the next steps in the approval workflow.

Clearance Requirements

Level	Requirements
<p align="center">OFA</p>	<ul style="list-style-type: none"> • Signed visitor form with correct dates and special indicators • Résumé for visitors over 18 • Minor Consent Form w/ insurance information for visitors 14-18
<p align="center">CUIMC HR</p>	<ul style="list-style-type: none"> • For special indicators: medical attestation form <ul style="list-style-type: none"> ○ Either WHS approval email OR ○ Attached form to be sent to WHS for approval • For visitors observing 3+ months: completed drug screening results from GIS • For Clinical and Administrative visitors: completed Visitor Package background screening results
<p align="center">Department</p>	<ul style="list-style-type: none"> • EH&S Safety Training, as per special indicators • Protection of Minors (POM) Training for PI/sponsor <ul style="list-style-type: none"> ○ Faculty members w/o background check on file require POM screening as per EOAA • HIPAA and Security Training complete within five business days of start date

Support Contact List

Name	Department	email
Wayne Tang	Surgery	wt2149@cumc.columbia.edu
Gabriela Guzman	OFA	gg2703@cumc.columbia.edu
D. Ryce	OFA	dxr2101@cumc.columbia.edu
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