JIRA Visitor Application User Guide

Updated September 2023

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

COLUMBIA | COLUMBIA UNIVERSITY IRVING MEDICAL CENTER
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

Table of Contents

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:

4

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.
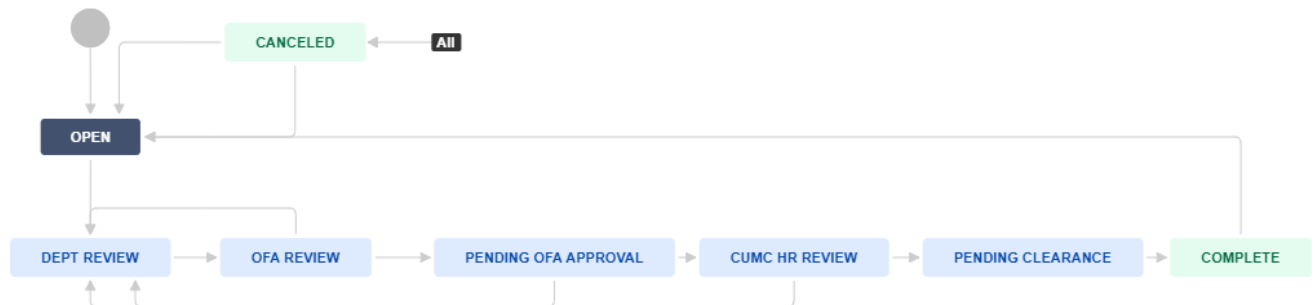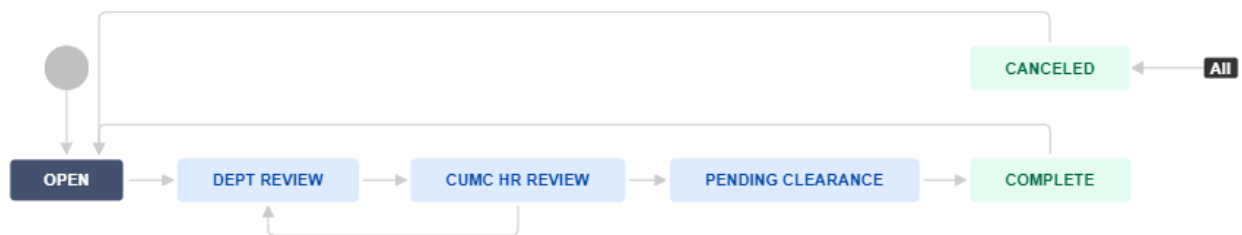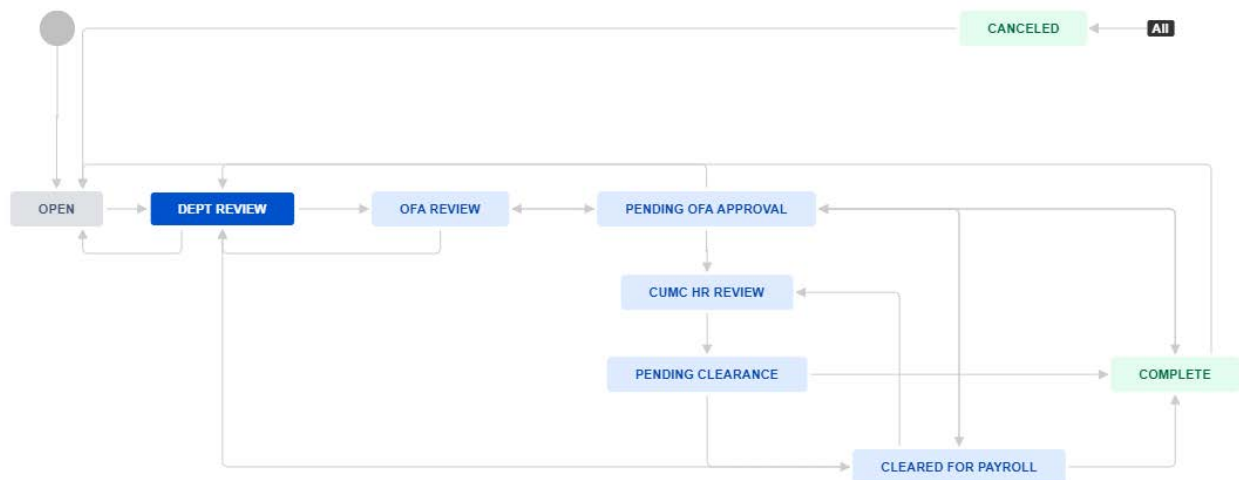
Submit to:
OFA

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
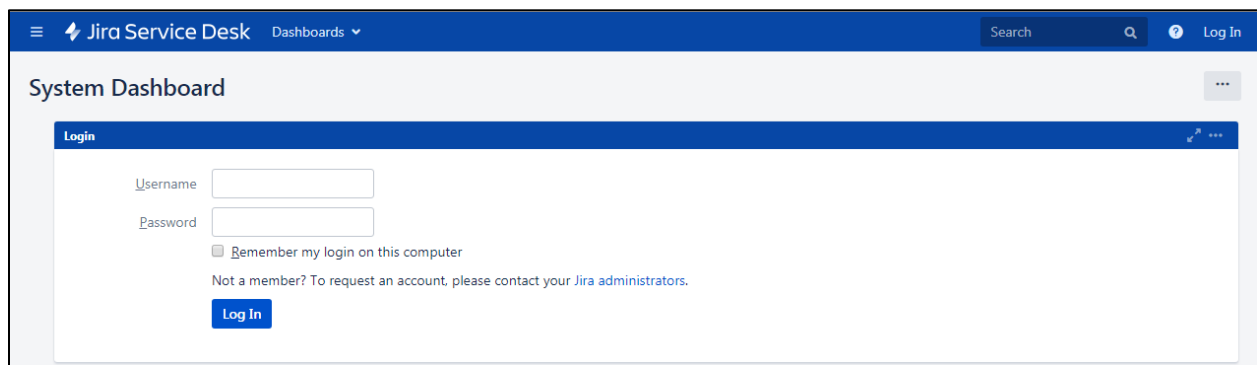
New User Requests

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
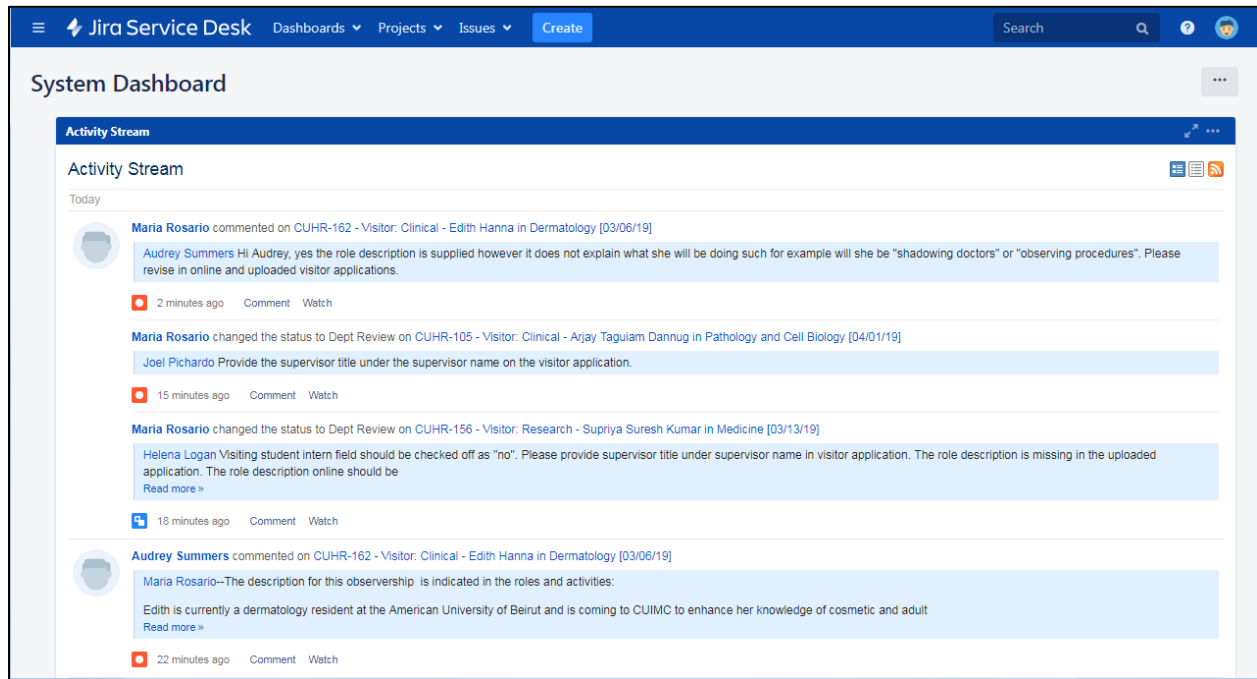
Username: UNI

Password: PC/Exchange Email Password
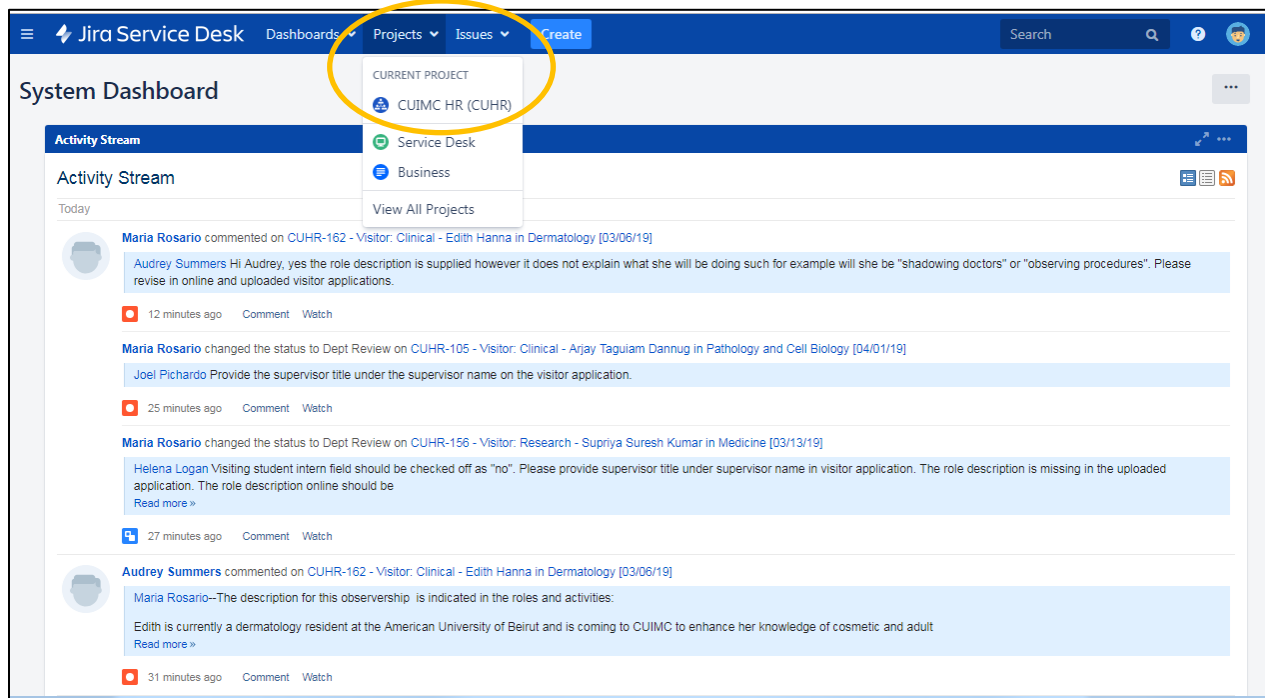
Project Navigation

Upon log-in, the System Dashboard will appear:

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

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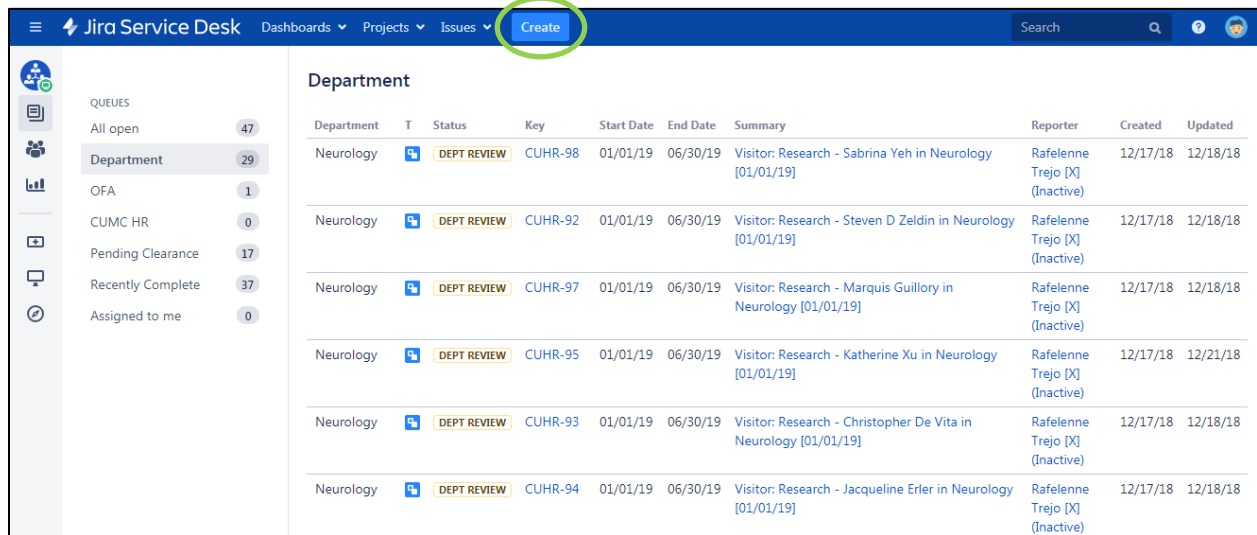
Clicking on any of the links in the Key or Summary columns will open the ticket. Tickets can now be edited when opened. Please refer to the Add/Edit Information section to edit a ticket.

Create Ticket

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

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).

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.

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	☁ Drop files to attach, or browse.

☐ Create another   **Create**   Cancel

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

Create Issue

⚙ Configure Fields ▾

Project*   🌐 CUIMC HR (CUHR)   ▾

Issue Type*   🟧 Visitor: Clinical   ▾   ⑦

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

Emergency Contact* Name

Emergency Contact* Relationship

Emergency Contact* Phone

☐ Create another   **Create**   Cancel

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

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

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

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 ⌄ ⑦
Created issue	relates to ⌄
Linked issues	CUHR-1544 ✕ ⌄ +
	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.

Channel.   Jira

⌄ Description

   None

⌄ Dates

   Created: 12 minutes ago

⌄ Attachments ▇ 📢 ⌄   ...

   Updated: Just now

   ⌄ Uncategorized ⓪   +
      No attachments

   Start Date: 09/29/23

   ⌄ Payroll ⓪   +
      No attachments

   End Date: 10/31/23

⌄ Issue Links   +

   relates to

      🔵 WHS-540 temp value   ═ OPEN

⌄ 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 ⌄]   [<] [Export ⌄]

⌄ **Details**

Type:	▣ Workforce Health & Safety	Resolution:	Unresolved	⌄ **SLAs**
				2d ⏸
				Time to resolution within 2d
Priority:	═ Medium	Security Level:	Restricted	
Labels:	None			
Department:	CUIMC HR			⌄ **People**
First Name:	test			Assignee:
Last Name:	test			Unassigned
Visitor Age:	Age over 18			Assign to me
Supervisor Name:	test			
Supervisor Phone:	test			Reporter:
NYP Space:	Yes			Thomas De Leon ⓘ

⌄ **Description**

None

⌄ **Attachments**   ...

HR Approval Group: cumchr-approver-hr

Watchers: ① Stop

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*   ⤒ Drop files to attach, or browse.

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 ⌄ A̲ ⌄ 𝒫 ⌄ Ⓤ ⌄ ≔ ≣ ☺ ⌄ + ⌄ 🗩 ⌄ ⌃

                                                        Submit to WHS   Cancel

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*   U̲   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.
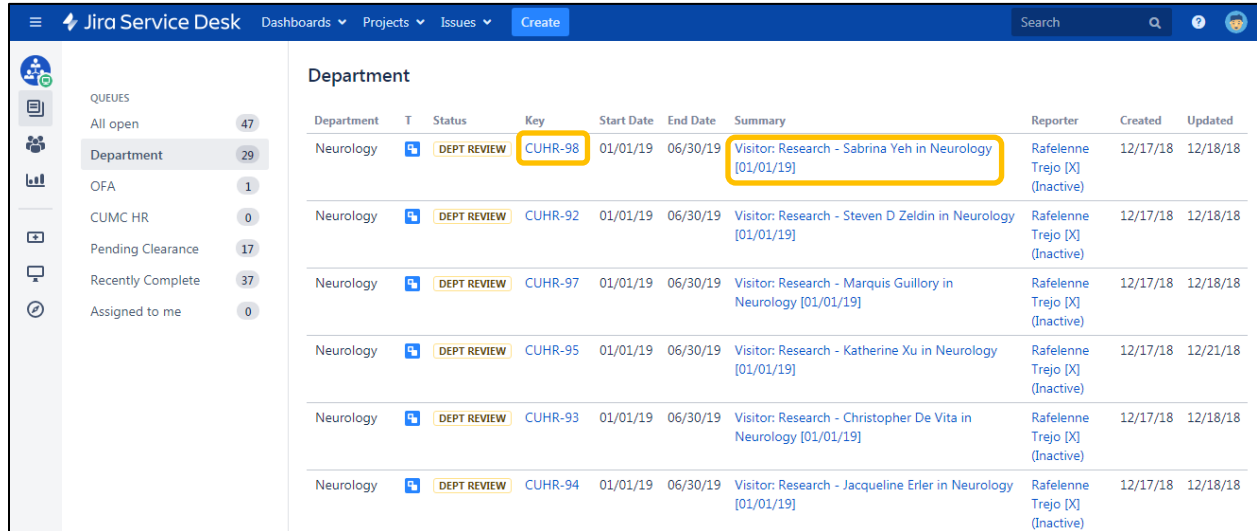
Workflow Status Table:

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
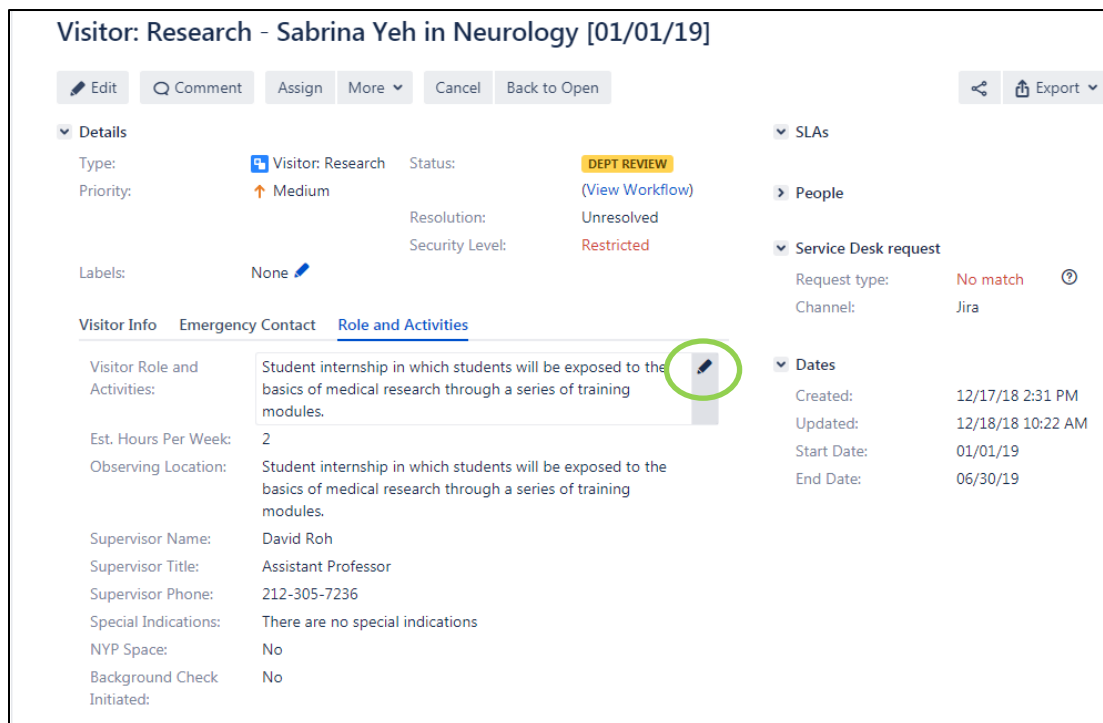
Add/Edit Information

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.

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

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

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.

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 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-neurolc
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

◄ ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬ ►
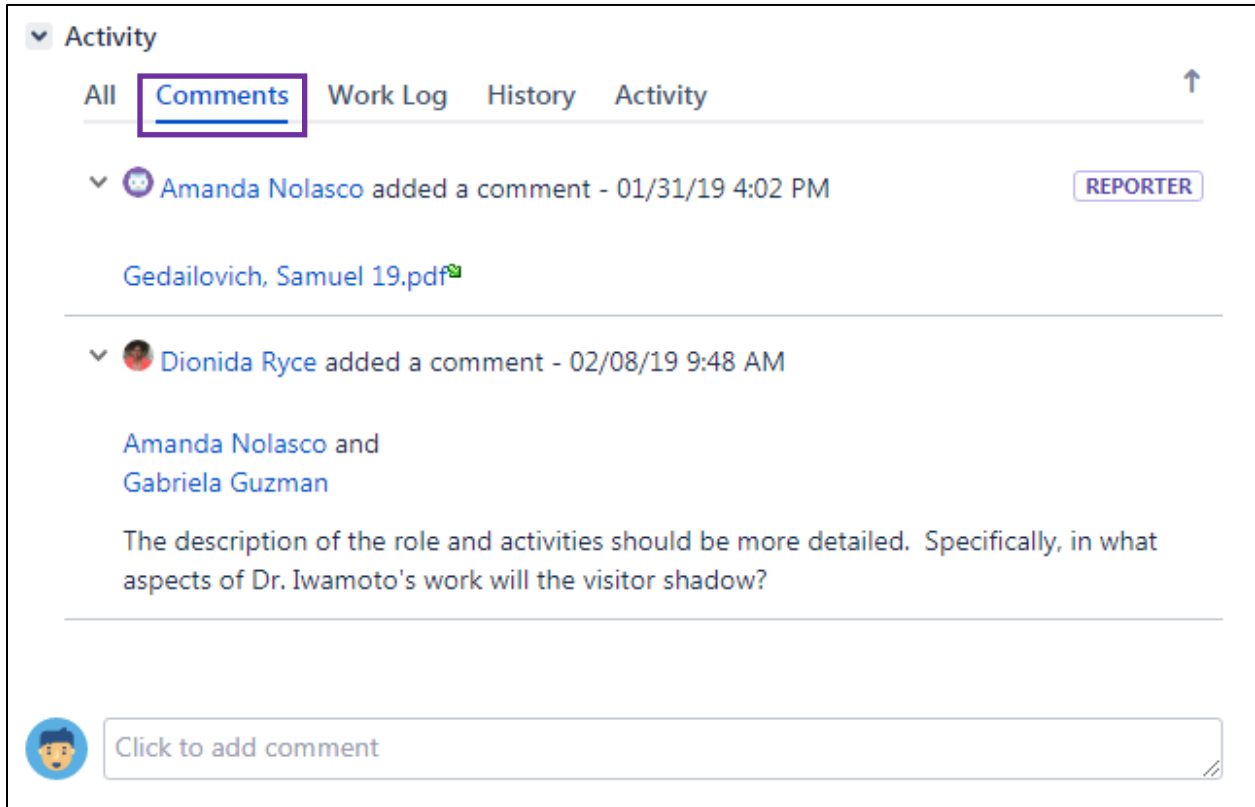
⊙ Amanda Nolasco made changes - 01/31/19 4:03 PM

Status	Open [1]	Dept Review [11204]

◄ ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬ ►

⊙ Iris Lara made changes - 02/01/19 3:41 PM

Start Date	02/14/19	02/15/19

◄ ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬ ►

⊙ 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]

◄ ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬ ►

The Activity tab displays the activity in more detail than the History tab.

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.

View Workflow

In an open ticket, the View Workflow link can be found under the Status.

Clicking the View Workflow link will pop-up a window that display's the workflow assigned to the ticket.
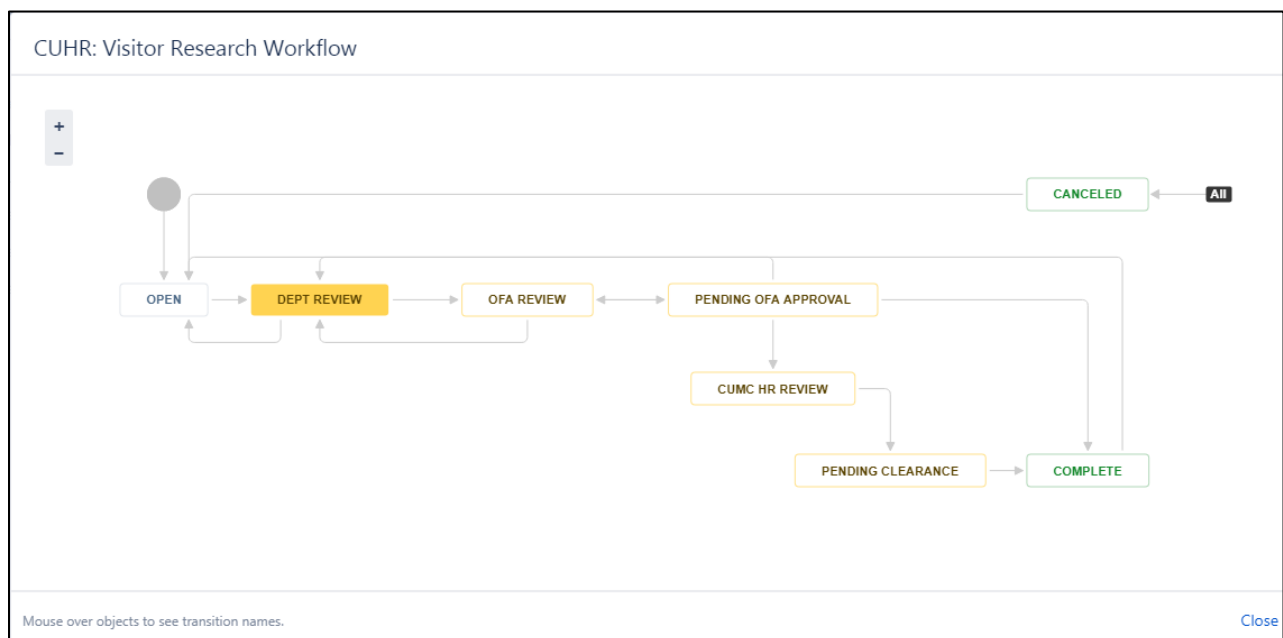
Hovering the mouse over the Workflow Status will display the actions associated with the directional arrows.
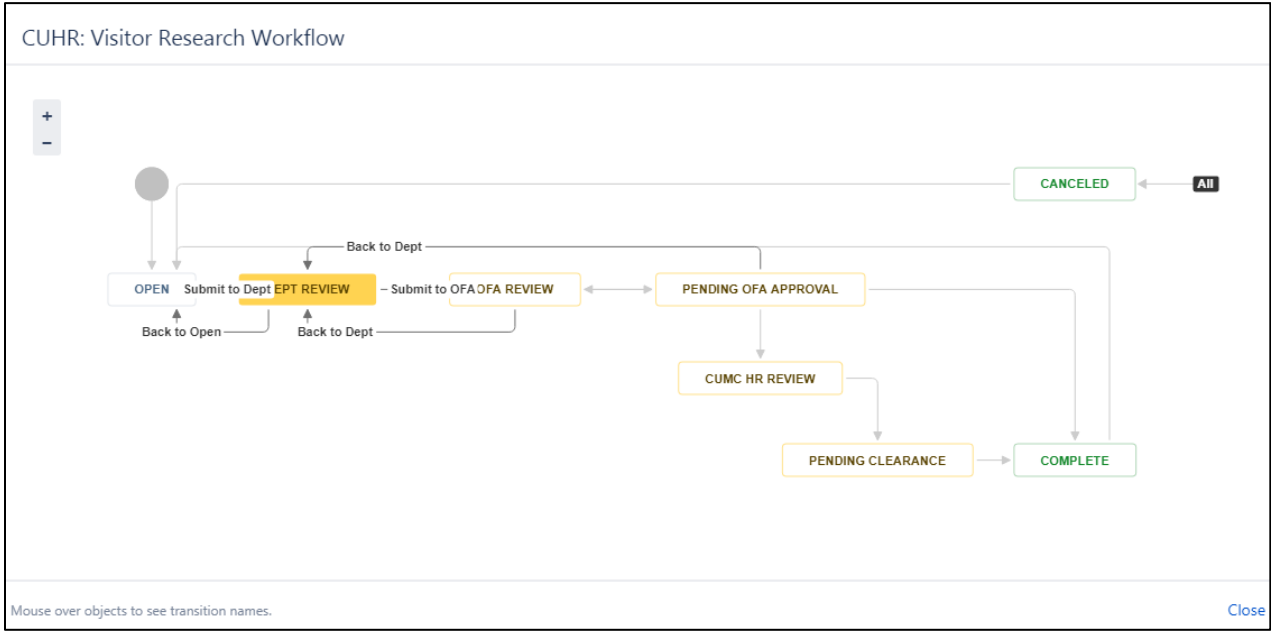
Users can use this feature as a reference tool to forecast the next steps in the approval workflow.

Clearance Requirements

Level	Requirements
OFA	- Signed visitor form with correct dates and special indicators - Résumé for visitors over 18 - Minor Consent Form w/ insurance information for visitors 14-18
CUIMC HR	- For special indicators: medical attestation form - 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
Department	- EH&S Safety Training, as per special indicators - Protection of Minors (POM) Training for PI/sponsor - 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
Allison Garcia	CUIMC HR	ag4655@cumc.coloumbia.edu
Naomi Velazquez	CUIMC HR	nv2316@cumc.columbia.edu
Hannah Mason	CUIMC HR	hjb2133@cumc.columbia.edu
Daniela Diaz	CUMC HR	dd2731@cumc.columbia.edu
Tom de Leon	CUIMC HR	td2248@cumc.columbia.edu