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## AHS IAM User Guide for: Epic (Connect Care) including DMO and 3M Access, or Connect Care Provider Portal Access

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## Prerequisite AHS IAM Security Profile

To use the AHS IAM, you must have completed your AHS IAM Security Profile. This one-time step takes only minutes to complete. If you have not created your Security Profile, you will be prompted to do so when you log into IAM. If you need help, click here to launch the [AHS IAM Security Profile User Guide](#), available on the [AHS IAM Support Page](#) under  **Learning**.

## What is Epic (Connect Care)?

**Epic** is the AHS provincial clinical information system. When you request Epic access, you will be asked to select one or more Epic roles OR a Connect Care Provider Portal Role – not both\*\*. Depending on the Epic role you select, you may be given or have the option of requesting access to Dragon Medical One (DMO) and / or 3M Health Information Systems (3M).

**Dragon Medical One (DMO)** is a speech platform for physicians and clinicians to securely dictate information into Epic. Access to this system is provided based on the Epic / Connect Care role chosen with overall Epic access; that is, this is not a separate selectable entitlement but part of a bundle.

**3M Health Information Systems (3M)** is the third-party vendor chosen to provide Health Information Management (HIM) with software products to enable HIM to use clinical documentation and administrative values from Connect Care and transform it into coded data. Coded data then becomes valuable information used for many purposes across the organization, the province, the country and even globally. Access to this system is provided based on the Epic / Connect Care role chosen with overall Epic access; that is, this is not a separate selectable entitlement but part of a bundle.

**Connect Care Provider Portal** is a web-based application that allows community private practices to view Alberta Health Services (AHS) Connect Care patient information to improve the continuity of care for patients as they move through the health care system. An end-user can have EITHER Connect Care Provider Portal OR Epic (Connect Care) but not both\*\*. Community providers who also work at AHS sites should choose Epic (Connect Care).

\*\* There is one exception; if you are a member of a study group you can select both Epic (Connect Care) and Connect Care Provider Portal access.



## Important information about access and training

As Epic (Connect Care) roles are selected, the required training appears on the request. There are, typically, two types of training required: computer-based training in MyLearningLink and instruct-led training.

### Computer Based Training in MyLearningLink

IAM interfaces with MyLearningLink (MLL) four (4) times every day. That process sets up the Computer Based Training in MyLearningLink for the end-user. Training should appear in MLL within 24 hours. If not, give it a bit more time if you can. If issues persist, contact the [AHS IT Service Desk](#).

### Instructor Led Training

The end-user's Manager must set up the required Instructor Led Training.

### IAM monitors training completion



IAM monitors the training systems several times each day to confirm what training has been completed by each end-user. Once training for each Epic (Connect Care) role is completed, access to that role is provided, but no sooner than the launch start date. Both the requester and end-user are sent an email notification from Identity Management.

IAM will continue monitoring for 365 days from the date the request was submitted. If the end-user does not complete their Epic (Connect Care) training within 365 days, the request will be automatically terminated. The requester will be notified by email if this occurs. A new [Epic \(Connect Care\)](#) access request will have to be submitted for the end-user.

## Remote Access for End-Users

### RSA SecurID Tokens

If you or an end-user need to access a computer system from outside an AHS facility, an RSA SecurID token (SecurID token) will be needed to provide a second form of authentication at login. This is called Two-Factor Authentication. You will be able to request remote access when completing the access request process in AHS IAM.

The SecurID token can be a hardware device that looks similar to this  or a software application that runs on your smartphone or computer with an icon similar to this .

When you are issued either type of SecurID token you will be required to create a 4-digit personal identification number (PIN). The token generates a number that changes every 60 seconds. Use your PIN and the digits displayed at the time of login to authenticate your identity.

 Click to read more in the [Remote access \(RUNA\) with RSA SecurID tokens Fact Sheet](#).

## Who can request what for whom?

### Epic End-User Role Category

- Can be requested by anyone for anyone
- Must be approved by an [Authorized Approver](#)
- If the Requester is an Authorized Approver the request is automatically approved

For information about Epic (Connect Care) roles for end-users, please visit:

<https://insite.albertahealthservices.ca/main/assets/cis/tms-cis-training-catalogue.xlsx>

### Admin Role Category

- Can only be requested by an Epic Admin Role Requester for end-users needing Admin access
- Must be approved by an [Authorized Approver](#)
- If the Epic Admin Role Requester is an Authorized Approver the request is automatically approved

Think you should be an Epic Admin Role Requester? Submit a General Service Request through the AHS IT Customer Service Portal.

### CMIO Role Category

- Can only be requested by a CMIO Role Requester for end-users needing CMIO access
- Must be approved by an [Authorized Approver](#)
- If the CMIO Role Requester is an Authorized Approver the request is automatically approved

### Epic Login Types

- Can be requested by anybody for anybody
- Does not require an Authorized Approver

### Connect Care Provider Portal Role Category

- Can only be requested by a CCPP Authorized Approver for community end-users
- Is automatically approved because the requester is an Authorized Approver

## AHS IAM Definitions

These may be different from your organization's definitions.

AHS Employee	
	A person on-boarded and paid through AHS Human Resources e-People
AHS Non-Employee	
	A person not on-boarded or paid through AHS Human Resources e-People

Screen shot data are fictitious. If you notice differences between AHS IAM and the screen shots shown, trust AHS IAM.

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<b>Community End-User</b>	
	A person who works for a privately owned health care delivery facility. Examples: physician, pharmacist, dentist, chiropractor.
<b>Combination End-User</b>	
	A person who is more than one of the above types.
<b>AHS IAM Admin</b>	
	AHS IAM Admin is the administrative team of specialists that support the AHS Identity & Access Management (AHS IAM) application.
<b>Authorized Approvers</b>	
	<p>Authorized Approvers are also called an Approving Manager or Entitlement Manager.</p> <p>There are two kinds of Authorized Approvers: those with a Delegation of Human Resources Authority and those that are granted approval authority by AHS IT Access Services when a DOHRA structure does not exist for their organization.</p> <p><a href="#">Authorized Approvers with DOHRA</a> are persons who have:</p> <p><a href="#">AHS Delegation of Human Resources Authority (DOHRA) of 1 to 12</a> OR <a href="#">Covenant Health DOHRA of 1 - 6, 9 - 12.</a> OR Carewest DOHRA of 1 - 4 OR Alberta Precision Laboratory DOHRA of 1-6</p> <p>Each organization's DOHRA is defined differently.</p>

## Section 1 – Epic End-User Role Category

**i** End-User Roles can be requested by anyone for anyone – the proper authorization is still always required. Requesters will be provided with all Launches but only End-User roles are visible to choose from. They have the ability to request multiple Access Criteria bundles at the same time.

**i** Begin by selecting the End-User Role Category. Then choose a Launch Effective Date and then one or more roles – these compose an “Access Criteria Bundle”. More than one Bundle can be requested at a time.

## Request Epic (Connect Care) Access

If you are requesting access for yourself, follow [Request Epic \(Connect Care\) access for yourself \(Myself\)](#).

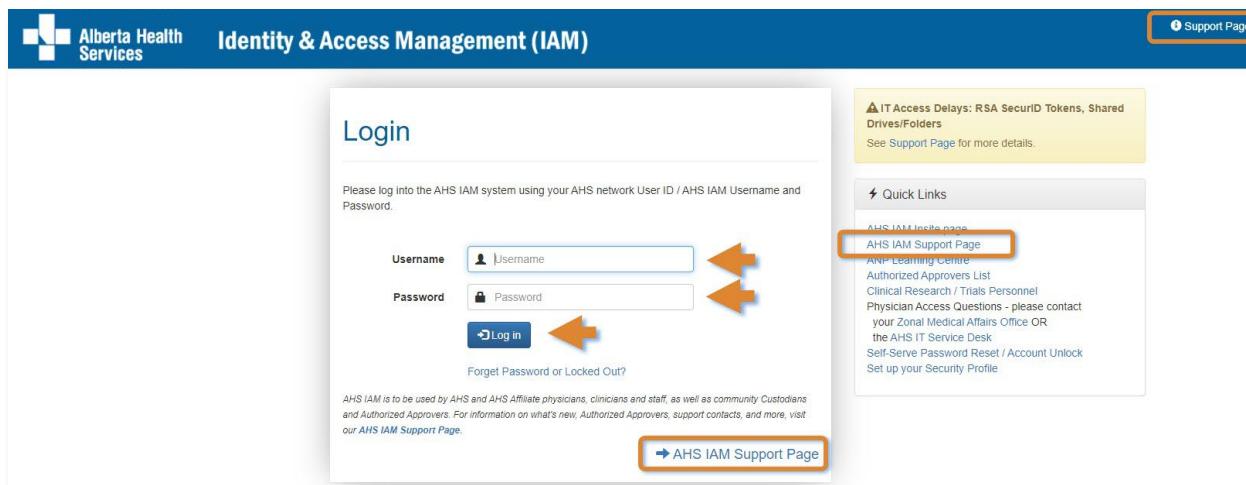
If you are requesting access for an existing [AHS employee](#) or [non-employee](#), follow [Request Epic \(Connect Care\) access for an Existing User](#).

If you are requesting access for a new AHS non-employee, who does not yet have access to the AHS Network, follow [Request Epic \(Connect Care\) access for a New User](#).

## Request Epic (Connect Care) access for Myself [yourself]

ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
The **AHS IAM Login** screen appears

Note the many access links to the **Support Page** for IAM news, information and learning materials. You can also access the **Support Page** once logged in.




ENTER your [Username](#) and [Password](#)

CLICK  [Log in](#)

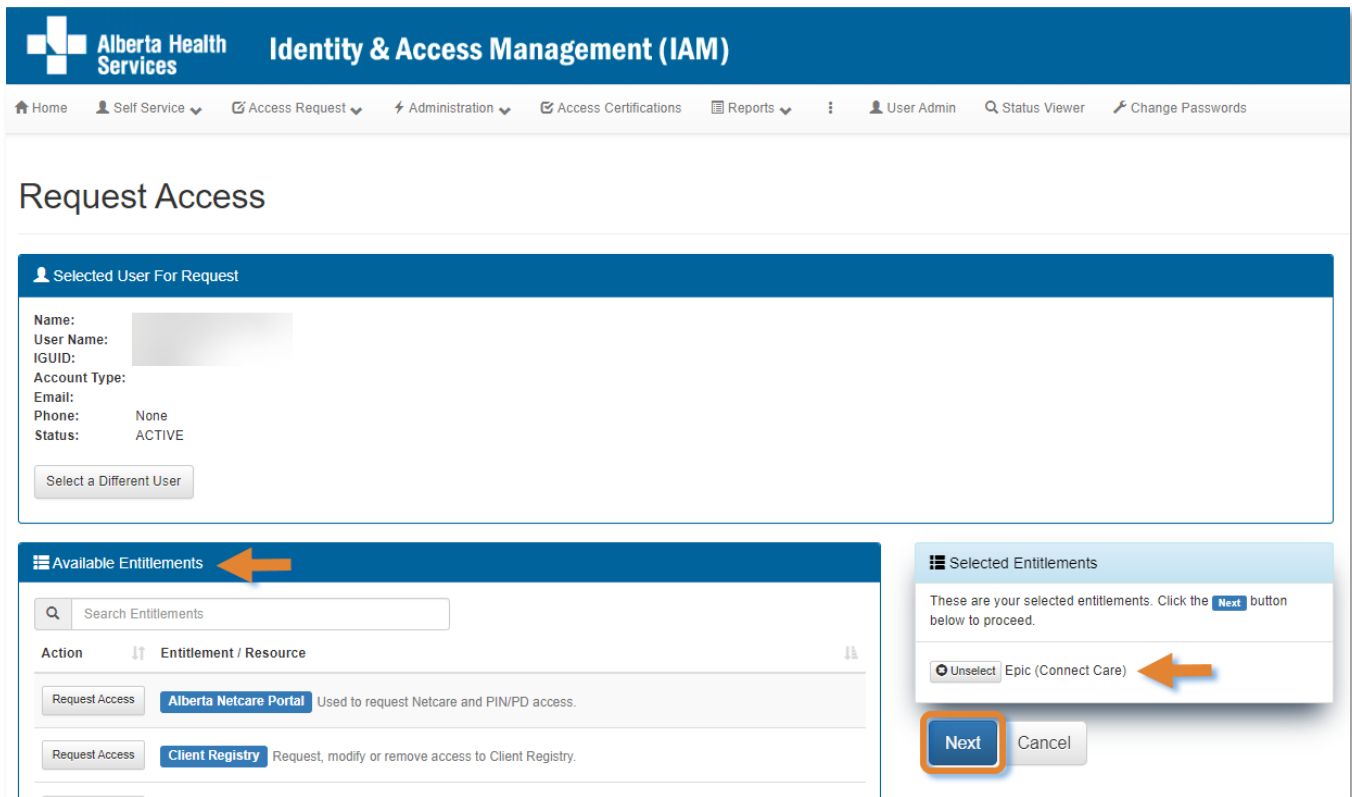
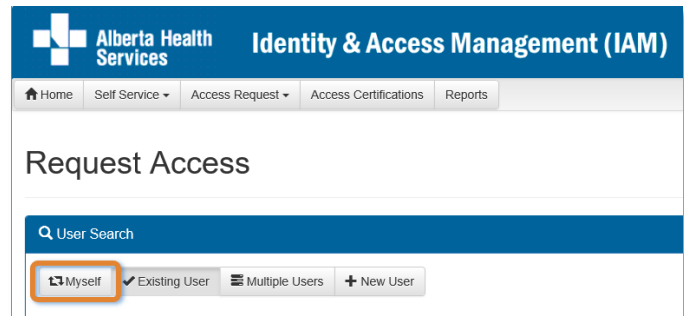
The **AHS IAM**  **Home** screen appears

CLICK [Request](#) or [Modify Access](#)

The **Request Access** screen appears  
with  [Existing User](#) selected

CLICK  [Myself](#)

The screen refreshes with your details displayed in the [Selected User for Request](#) pane  
followed by a list of [Available Entitlements](#)



Under [Available Entitlements](#), at [Epic \(Connect Care\)](#), CLICK [Request Access](#)

The screen refreshes and the [Selected Entitlements](#) pane appears with [Epic \(Connect Care\)](#) displayed.

CLICK [Next](#)

The **Complete Access Request** screen appears

 Go to [Complete Epic \(Connect Care\) Pane](#) instructions



## Request Epic (Connect Care) access for an Existing User


 Use this process to request access for a person who has an existing AHS Network UserID.

### **Managers, please note**

Another manager or staff person can request access for your staff. But only you – an end-user's manager – can set up their Epic Instructor-Led Training.

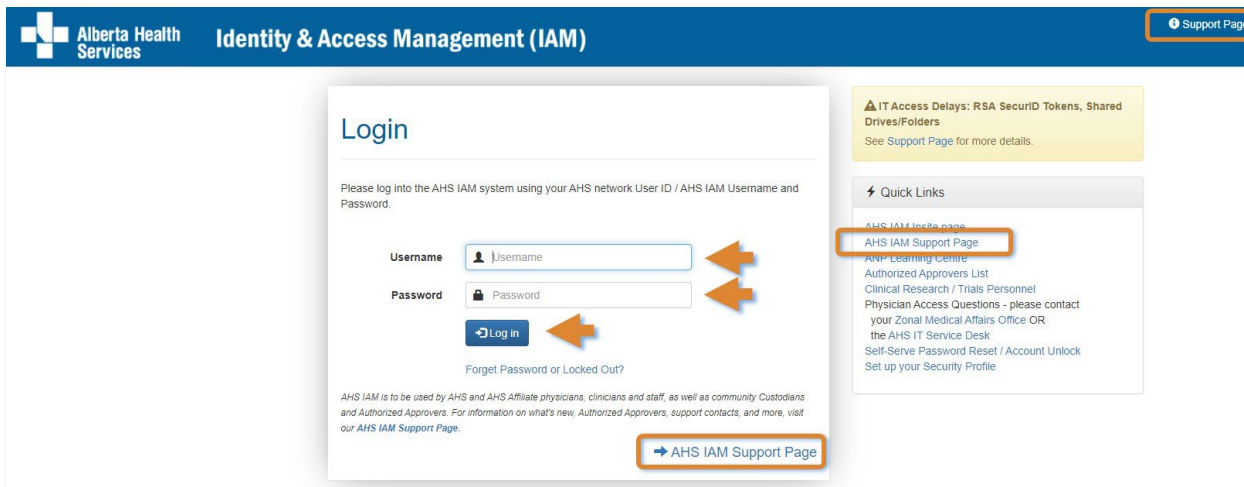
ACCESS Tableau for Connect Care Training and Access Progress:

[https://tableau.albertahealthservices.ca/#/views/ConnectCareTrainingAccounts\\_0/Detail?.iid=1](https://tableau.albertahealthservices.ca/#/views/ConnectCareTrainingAccounts_0/Detail?.iid=1)

ENTER the AHS IAM URL into your internet web browser  <https://iam.albertahealthservices.ca>

The **AHS IAM Login** screen appears

Note the many access links to the **Support Page** for IAM news, information and learning materials. You can also access the **Support Page** once logged in.



ENTER your **Username** and **Password**

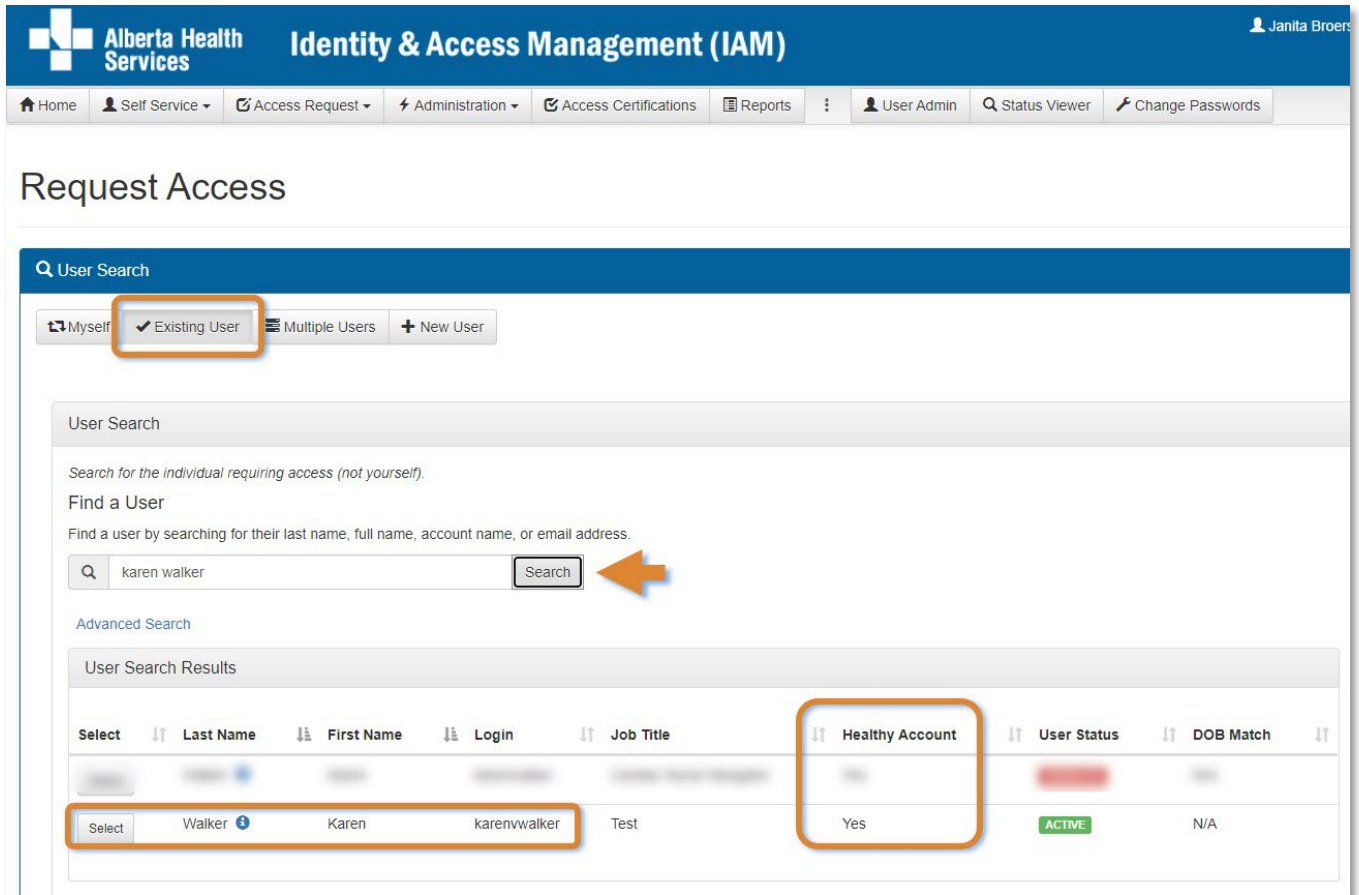
CLICK  **Log in**

The **AHS IAM**  **Home** screen appears

CLICK **Request** or **Modify Access**

The **Request Access** screen appears with  **Existing User** selected

SEARCH for the existing end-user using the simple or [Advanced Search](#) functions  
[User Search Results](#) appear



**Request Access**

**User Search**

Myself **Existing User** Multiple Users + New User

User Search

Search for the individual requiring access (not yourself).

Find a User

Find a user by searching for their last name, full name, account name, or email address.

Q karen walker Search

Advanced Search

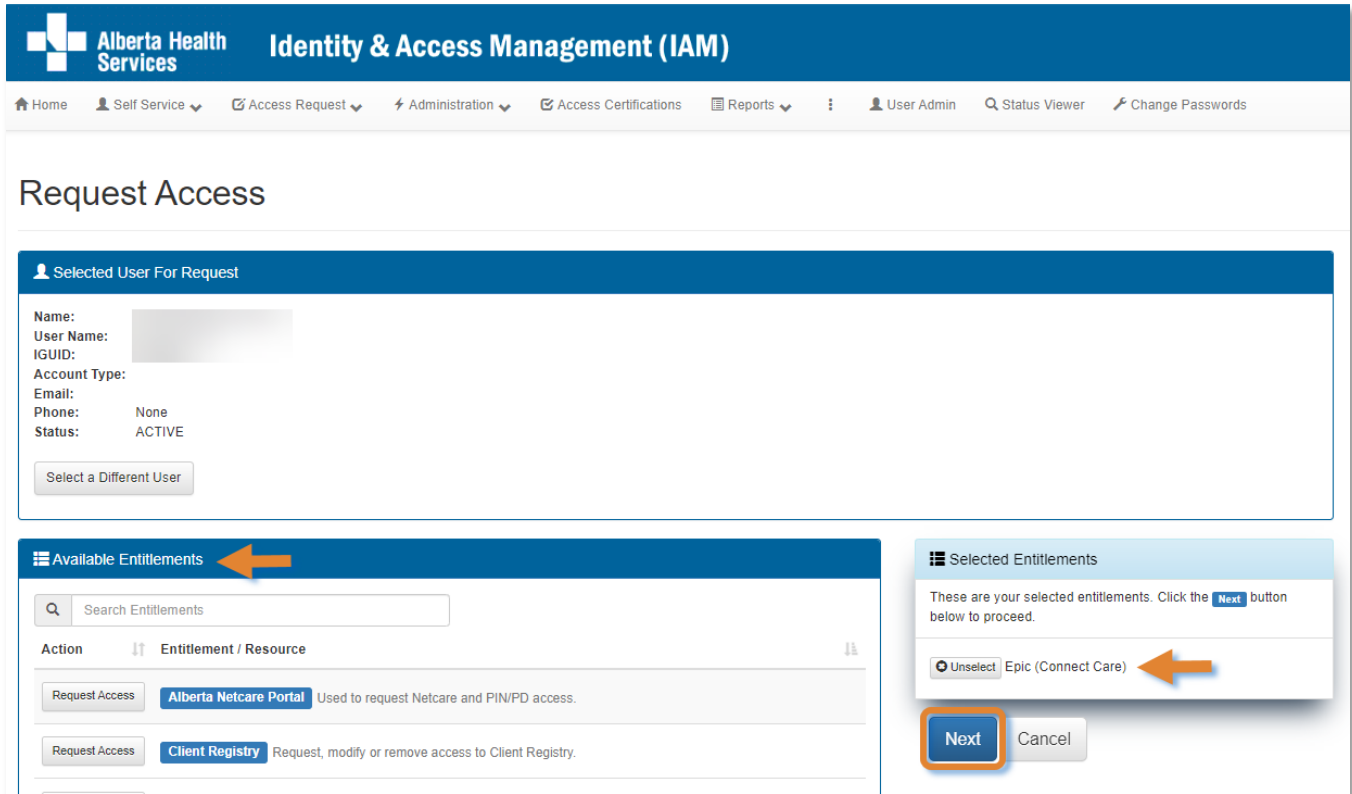
User Search Results

Select	Last Name	First Name	Login	Job Title	Healthy Account	User Status	DOB Match
Select	Walker	Karen	karenvwalker	Test	Yes	ACTIVE	N/A

NOTICE in our example, the [Existing User](#) already has an AHS Network User ID / [Healthy Account](#)

SELECT the end-user

The **Request Access** screen appears with the end-user's details displayed in the [Selected User For Request](#) pane followed by a list of Available Entitlements



**Request Access**

**Selected User For Request**

Name: [Redacted]  
 User Name: [Redacted]  
 IGUID: [Redacted]  
 Account Type: [Redacted]  
 Email: [Redacted]  
 Phone: None  
 Status: ACTIVE

Select a Different User

**Available Entitlements**

Search Entitlements

Action	Entitlement / Resource
Request Access	<b>Alberta Netcare Portal</b> Used to request Netcare and PIN/PD access.
Request Access	<b>Client Registry</b> Request, modify or remove access to Client Registry.

**Selected Entitlements**

These are your selected entitlements. Click the **Next** button below to proceed.

☐ Unselect **Epic (Connect Care)**

**Next** Cancel

Under **Available Entitlements**, at **Epic (Connect Care)**, CLICK **Request Access**

**i** If the button says **Change Access**, the end-user already had Epic (Connect Care) access from another launch. You can modify their current access OR request access for a different launch.

The screen refreshes and the **Selected Entitlements** pane appears with **Epic (Connect Care)** displayed.


CLICK **Next**

The **Complete Access Request** screen appears



Go to [Complete Epic \(Connect Care\) Pane](#) instructions

## Request Epic (Connect Care) access for a New User

 Use this process to request access for a person who does not have an AHS Network UserID AND has not or will not be on-boarded or paid through AHS e-People. They are defined by AHS IAM as an [AHS non-employee](#). By choosing [New User](#), IAM will automatically provide you with the AHS Network Access Request (NAR) form to request network access first and Epic access second.

## Access Process Overview

### Complete a Network Access Request (NAR)

The [Epic \(Connect Care\)](#) workflow will automatically include a [Network Account \(NAR\)](#) form the Requester must complete. This is because a new end-user must first be given an AHS Network UserID (User name and Password) to access AHS computer systems.

### Complete the Epic (Connect Care) access request

Identify the Epic Role Type, Launch, one or more roles, and the Entitlement Manager / Authorized Approver in one [Access Criteria Bundle](#). You can create more than one Access Criteria Bundle in the same request.

### Request Remote Access if needed

If the new end-user will need to access [Epic \(Connect Care\)](#) remotely, from outside an AHS facility, ask for remote access on the [NAR](#) form. The Epic (Connect Care) workflow will automatically include the [Remote User Network Access \(RUNA\)](#) form the Requester must complete.

### Submit the Request for Approvals

Once you submit the request, the [Entitlement Manager](#) / Authorized Approver identified will be sent an email notification from Identity Management that action is required.

The [NAR](#) and [RUNA](#) requests will be queued for approval first. This is done so that the end-user can get their AHS Network UserID right away to access MyLearningLink (MLL) and complete their Epic training.

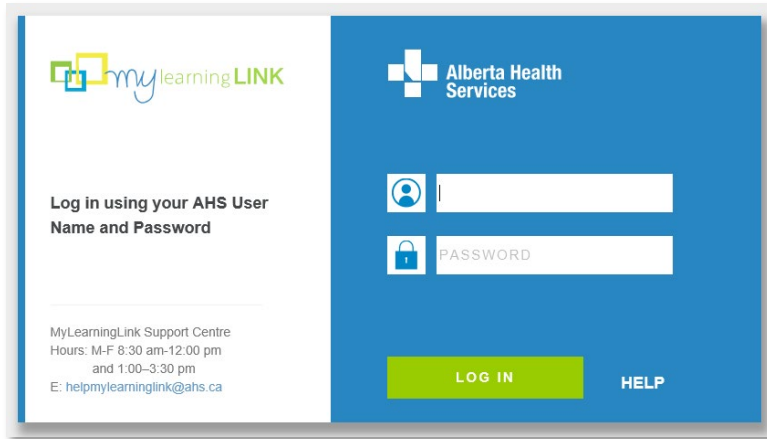
### Set up Training

There are typically two types of training for every Epic (Connect Care) Role: Computer-Based Training (CBT) and Instructor-Led Training (ILT). CBT training will be completed in MyLearningLink. ILT training must be set up by an end-user's Manager (not a delegate).

IAM will relay information to MyLearningLink four (4) times every day. All computer-based training for each Epic Role should be available in MLL within 24 hours. If training does not appear, give it a bit more time if you can. If issues persist, contact the [AHS IT Service Desk](#).

Direct your staff to complete their Epic (Connect Care) training as expediently as possible. MLL is accessible on the external web with an AHS Network User Name and Password. A remote access token is not required.


 <https://mylearninglink.albertahealthservices.ca>

The screenshot shows the login interface for mylearningLINK. On the left, the logo 'mylearningLINK' is displayed above the text 'Log in using your AHS User Name and Password'. Below this, contact information for the MyLearningLink Support Centre is provided: 'Hours: M-F 8:30 am-12:00 pm and 1:00-3:30 pm' and 'E: helpmylearninglink@ahs.ca'. On the right, the 'Alberta Health Services' logo is at the top. Below it are two input fields: one for the username (preceded by a person icon) and one for the password (preceded by a lock icon). At the bottom right, there are two buttons: a green 'LOG IN' button and a blue 'HELP' button.

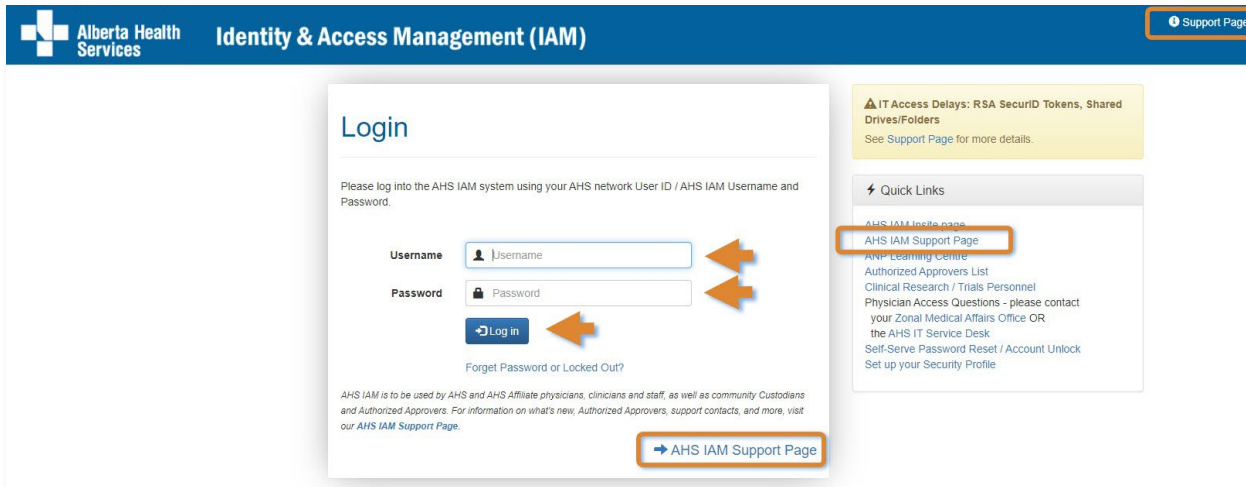
## Epic (Connect Care) Access

IAM monitors the training systems several times each day to confirm what training has been completed by each end-user. Once training for each Epic (Connect Care) role is completed, access to that role is provided, but no sooner than the launch start date. Both the requester and end-user are sent email notifications from Identity Management.

IAM will continue monitoring for 365 days from the date the request was submitted. If the end-user does not complete their Epic (Connect Care) training within 365 days, the request will be automatically terminated. The requester will be notified by email if this occurs. A new [Epic \(Connect Care\)](#) access request will have to be submitted for the end-user.

ENTER the AHS IAM URL into your internet web browser  <https://iam.albertahealthservices.ca>  
The **AHS IAM Login** screen appears

Note the many access links to the **Support Page** for IAM news, information and learning materials. You can also access the **Support Page** once logged in.



ENTER your **Username** and **Password**

CLICK  **Log in**

The **AHS IAM**  **Home** screen appears

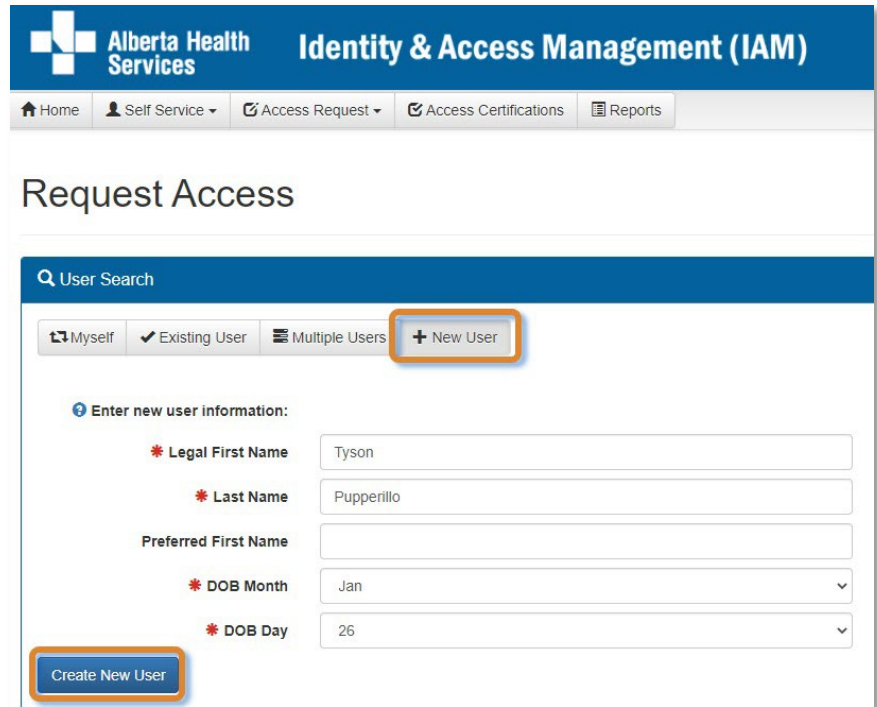
CLICK **Request** or **Modify Access**

The **Request Access** screen appears with  **Existing User** selected

## SELECT [New User](#)

The screen refreshes to capture the end-user's information. Choose this option when the end-user does not have an AHS Network UserID and is not onboarded or paid through AHS e-People. See [IAM Definitions](#) for more information.

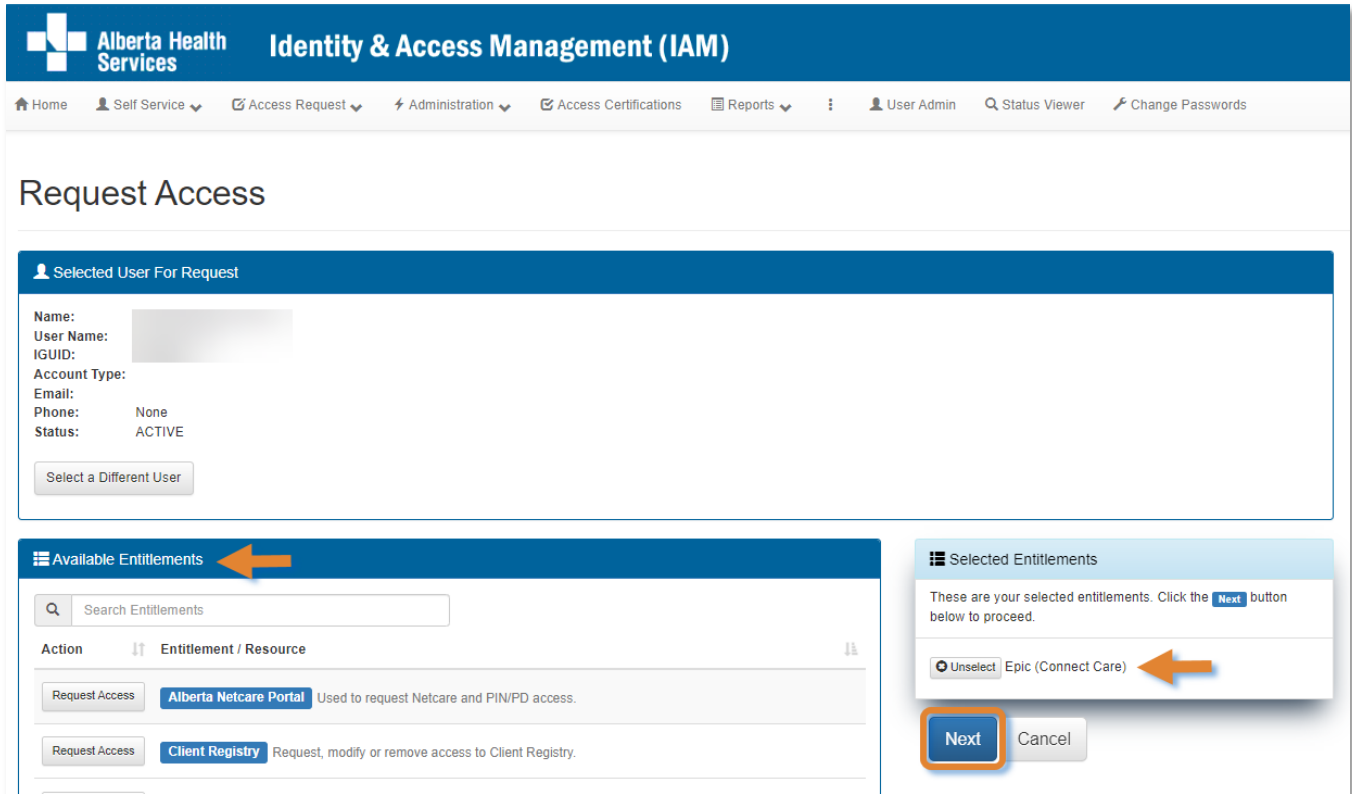
ENTER the required information



The screenshot shows the 'Request Access' page in the AHS IAM system. At the top, there's a navigation bar with 'Home', 'Self Service', 'Access Request', 'Access Certifications', and 'Reports'. Below this, the 'Request Access' title is displayed. A 'User Search' section includes tabs for 'Myself', 'Existing User', 'Multiple Users', and a highlighted '+ New User' button. Under the 'New User' tab, there's a section titled 'Enter new user information:' with the following fields: 'Legal First Name' (Tyson), 'Last Name' (Pupperillo), 'Preferred First Name' (empty), 'DOB Month' (Jan), and 'DOB Day' (26). At the bottom left of this section, the 'Create New User' button is highlighted with an orange box.

## CLICK [Create New User](#)

The **Request Access** screen appears with the new user's information populated under [Selected User For Request](#)



**Request Access**

**Selected User For Request**

Name: [Redacted]  
 User Name: [Redacted]  
 IGUID: [Redacted]  
 Account Type: [Redacted]  
 Email: [Redacted]  
 Phone: None  
 Status: ACTIVE

Select a Different User

**Available Entitlements**

Search Entitlements

Action	Entitlement / Resource
Request Access	<b>Alberta Netcare Portal</b> Used to request Netcare and PIN/PD access.
Request Access	<b>Client Registry</b> Request, modify or remove access to Client Registry.

**Selected Entitlements**

These are your selected entitlements. Click the **Next** button below to proceed.

☐ Unselect **Epic (Connect Care)**

**Next** Cancel

Under **Available Entitlements**, at **Epic (Connect Care)**, CLICK **Request Access**

The screen refreshes and the **Selected Entitlements** pane appears with **Epic (Connect Care)** displayed.

CLICK **Next**

The **Complete Access** screen appears with the **Network Access Request (NAR)** pane displayed followed by the **Epic (Connect Care)** pane. This is because the new end-user must get an AHS Network UserID in order to access MyLearningLink for Epic training requirements.



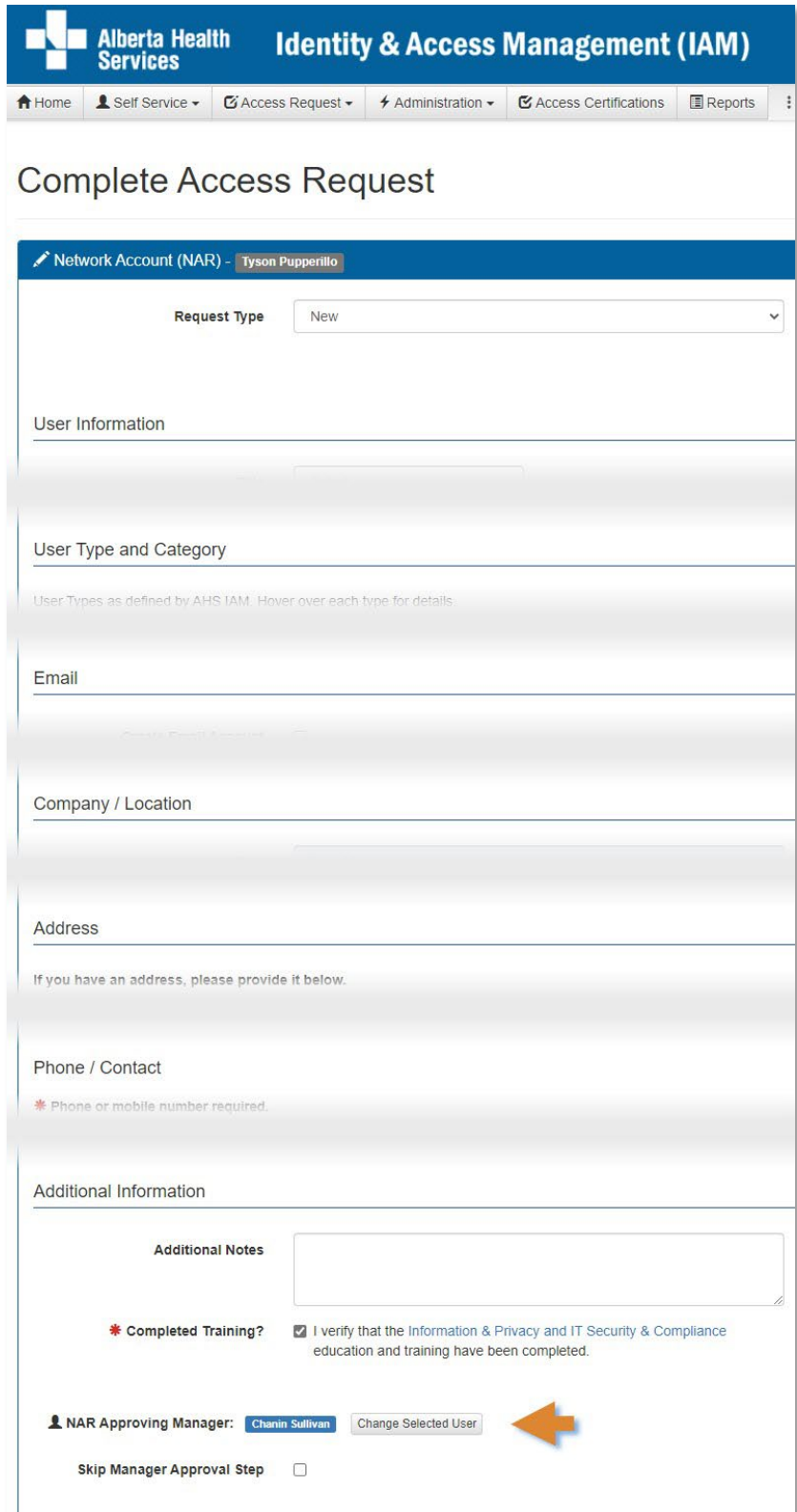
## Complete the Network Access Request (NAR) Pane

ENTER all mandatory information  
and as much optional information  
as possible

### At Additional Information

If you are an [Authorized Approver](#), your name will automatically appear. ACCEPT or CHANGE the NAR Approving Manager

If you are not an [Authorized Approver](#), SEARCH for and SELECT one



Alberta Health Services Identity & Access Management (IAM)

Home Self Service Access Request Administration Access Certifications Reports

### Complete Access Request

Network Account (NAR) - Tyson Pupperillo

Request Type: New

User Information

User Type and Category

User Types as defined by AHS IAM. Hover over each type for details.

Email

Company / Location

Address

If you have an address, please provide it below.

Phone / Contact

\* Phone or mobile number required.

Additional Information

Additional Notes

\* Completed Training? ☒ I verify that the Information & Privacy and IT Security & Compliance education and training have been completed.

NAR Approving Manager: Chanin Sullivan Change Selected User

Skip Manager Approval Step ☐

## Complete the Epic (Connect Care) Pane

### SELECT End User Role Category

The screen refreshes to display an  
**End User Role Category – Access  
Criteria Bundle**

You can submit more than one  
access bundle at a time. **CLICK**  
the **End User Role Category** as  
many times as needed.

### SELECT the Launch

The pane will refresh to include  
launch specific details

### ACCEPT or CHANGE the Account Expiry Date

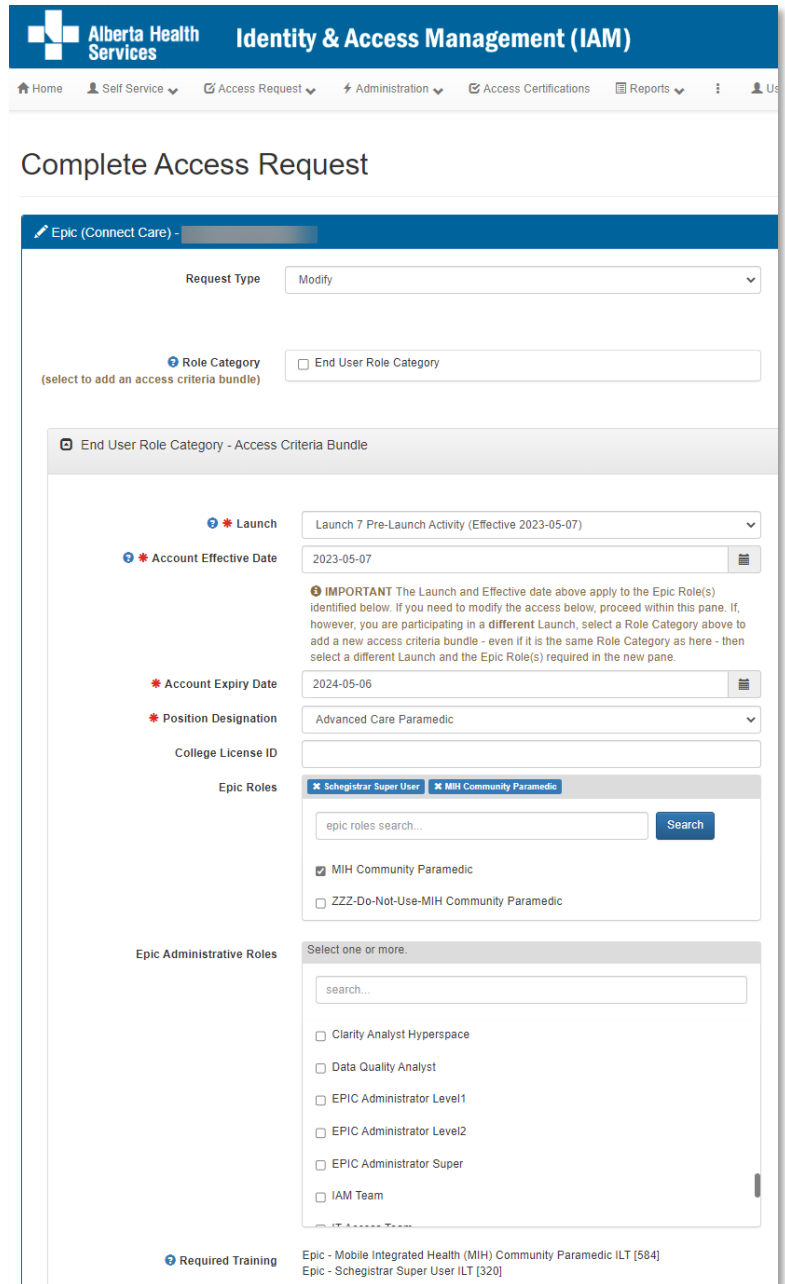
### ENTER Position Designation

### ENTER College License ID as needed

### SELECT Epic Roles

### SELECT Epic Administrative Roles as needed

**Required Training** will display for  
its corresponding Epic role



**Alberta Health Services Identity & Access Management (IAM)**

Home Self Service Access Request Administration Access Certifications Reports

### Complete Access Request

**Epic (Connect Care)**

Request Type: Modify

**Role Category** (select to add an access criteria bundle): ☐ End User Role Category

**End User Role Category - Access Criteria Bundle**

**Launch**: Launch 7 Pre-Launch Activity (Effective 2023-05-07)

**Account Effective Date**: 2023-05-07

**Account Expiry Date**: 2024-05-06

**Position Designation**: Advanced Care Paramedic

**College License ID**:

**Epic Roles**: ☒ Schegistrar Super User ☒ MIH Community Paramedic

epic roles search...

☒ MIH Community Paramedic  
☐ ZZ-Do-Not-Use-MIH Community Paramedic

**Epic Administrative Roles**: Select one or more.

search...

- ☐ Clarity Analyst Hyperspace
- ☐ Data Quality Analyst
- ☐ EPIC Administrator Level1
- ☐ EPIC Administrator Level2
- ☐ EPIC Administrator Super
- ☐ IAM Team

**Required Training**: Epic - Mobile Integrated Health (MIH) Community Paramedic ILT [584]  
Epic - Schegistrar Super User ILT [320]

COMPLETE [Dragon Medical One \(DMO\)](#) and / or [3M](#) details as needed

ACCEPT or CHANGE the [Entitlement Manager](#) if displayed

OR

SEARCH for and SELECT an [Entitlement Manager / Authorized Approver](#) if one is not displayed

If [Role Type Selections](#) are displayed  
SELECT the [Login Type Roles](#) required.

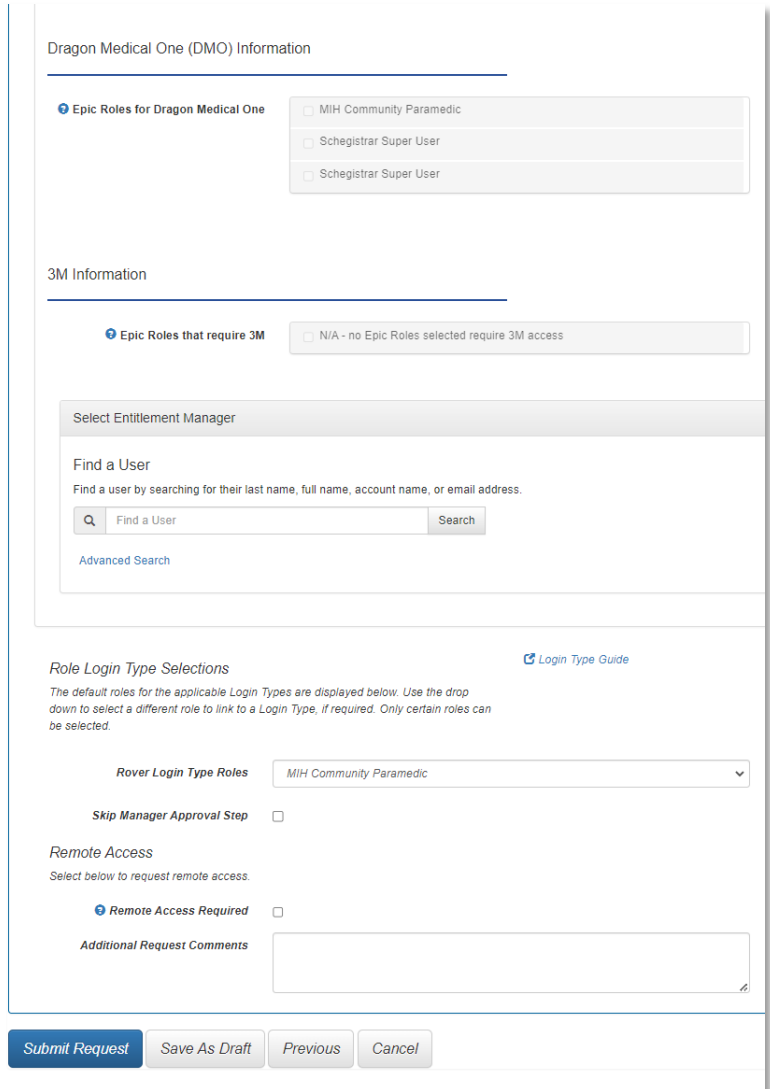
[Role Login Types](#) are only displayed for Epic (Connect Care) roles that may need access to the Executive Web Dashboard, Haiku/Canto, Rover, and Willow Ambulatory.

Consult the [Login Type Guide](#) for more information if needed. You'll see it is also linked right in the form.

SELECT [Remote Access Required](#) if the end-user will need to access Epic outside an AHS facility.

Select this even if the end-user has an RSA SecurID token already. This will ensure that token and their Epic access are linked. Click to read more in the [Remote access \(RUNA\) with RSA SecurID tokens Fact Sheet](#).

CLICK [Submit Request](#)



The screenshot shows a web form for requesting access. It is divided into several sections:

- Dragon Medical One (DMO) Information:** Contains a section for "Epic Roles for Dragon Medical One" with three checkboxes: "MIH Community Paramedic", "Schegistrar Super User", and "Schegistrar Super User".
- 3M Information:** Contains a section for "Epic Roles that require 3M" with a checkbox labeled "N/A - no Epic Roles selected require 3M access".
- Select Entitlement Manager:** Includes a "Find a User" section with a search bar and a "Search" button. Below it is a link for "Advanced Search".
- Role Login Type Selections:** Includes a link to the "Login Type Guide". Below it is a dropdown menu for "Rover Login Type Roles" currently set to "MIH Community Paramedic".
- Skip Manager Approval Step:** A checkbox.
- Remote Access:** A section titled "Select below to request remote access." containing a checkbox for "Remote Access Required".
- Additional Request Comments:** A text area for providing more details.
- Buttons:** At the bottom are four buttons: "Submit Request" (highlighted in blue), "Save As Draft", "Previous", and "Cancel".

## Complete the Remote User Network Access (RUNA) Pane

COMPLETE all mandatory \* fields and as many optional fields as possible.

SELECT the [Request Type](#) that applies from the drop-down list and complete the required details.

IAM will know if the end-user has an RSA SecurID token already provisioned.

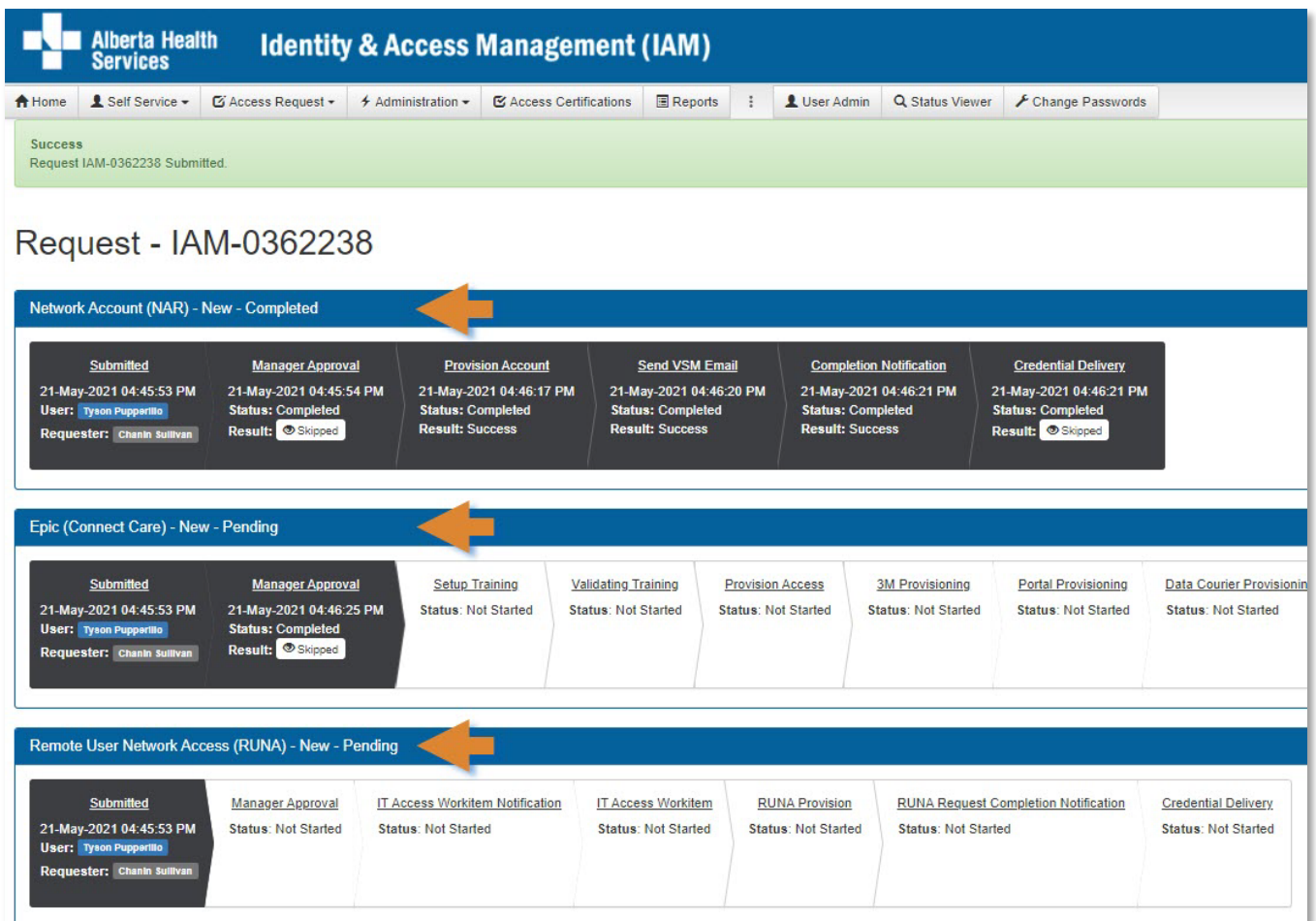
If the end-user does not have an RSA SecurID token, the [Request Type](#) will be [New](#).

If the end-user does have a token, the only [Request Type](#) available will be [Modify](#) or [Remove](#).

CLICK [Submit Request](#)

The **Request Status** screen will appear with all entitlements and their statuses displayed

NOTICE the [Success Request IAM-#####](#) message at the top of the page



**Success**  
Request IAM-0362238 Submitted.

### Request - IAM-0362238

Network Account (NAR) - New - Completed	
<a href="#">Submitted</a> 21-May-2021 04:45:53 PM User: <a href="#">Tyson Puppertallo</a> Requester: <a href="#">Chanin Sullivan</a>	<a href="#">Manager Approval</a> 21-May-2021 04:45:54 PM Status: Completed Result: <a href="#">Skipped</a>
<a href="#">Provision Account</a> 21-May-2021 04:46:17 PM Status: Completed Result: Success	<a href="#">Send VSM Email</a> 21-May-2021 04:46:20 PM Status: Completed Result: Success
<a href="#">Completion Notification</a> 21-May-2021 04:46:21 PM Status: Completed Result: Success	<a href="#">Credential Delivery</a> 21-May-2021 04:46:21 PM Status: Completed Result: <a href="#">Skipped</a>

Epic (Connect Care) - New - Pending	
<a href="#">Submitted</a> 21-May-2021 04:45:53 PM User: <a href="#">Tyson Puppertallo</a> Requester: <a href="#">Chanin Sullivan</a>	<a href="#">Manager Approval</a> 21-May-2021 04:46:25 PM Status: Completed Result: <a href="#">Skipped</a>
<a href="#">Setup Training</a> Status: Not Started	<a href="#">Validating Training</a> Status: Not Started
<a href="#">Provision Access</a> Status: Not Started	<a href="#">3M Provisioning</a> Status: Not Started
<a href="#">Portal Provisioning</a> Status: Not Started	<a href="#">Data Courier Provisioning</a> Status: Not Started

Remote User Network Access (RUNA) - New - Pending	
<a href="#">Submitted</a> 21-May-2021 04:45:53 PM User: <a href="#">Tyson Puppertallo</a> Requester: <a href="#">Chanin Sullivan</a>	<a href="#">Manager Approval</a> Status: Not Started
<a href="#">IT Access Workitem Notification</a> Status: Not Started	<a href="#">IT Access Workitem</a> Status: Not Started
<a href="#">RUNA Provision</a> Status: Not Started	<a href="#">RUNA Request Completion Notification</a> Status: Not Started
<a href="#">Credential Delivery</a> Status: Not Started	

If you are an [Authorized Approver](#) the [Manager Approval](#) step will auto complete. If not, the flow will hold at this step until the [Entitlement Manager](#) / Authorized Approver has provided their approval.

Once approved, the request will proceed to [Validating Training](#) with a status of [Hold](#).

Once the end-user has completed their training the request will proceed to completion. Then the RSA SecurID token will be provided to the end-user.

TRACK the progress of the request under [Request Status](#)

CLICK on the [Request](#) number for more details. As the Requester you will also be sent an email notification from Identity Management as the request progresses through to completion.

Complete 

## SECTION 2 – EPIC ADMIN ROLE CATEGORY

**i** Admin Roles are only visible to and can only be requested by specific individuals for administrative end-users. They are provided with all Launches but only Admin Roles to choose from. They have the ability to request multiple Access Criteria bundles at the same time.

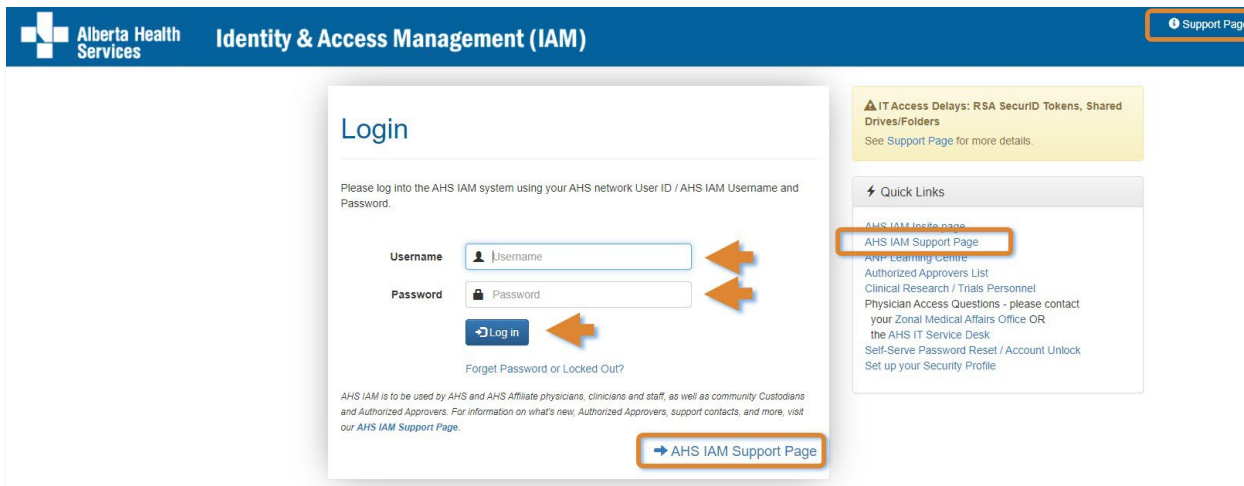
**i** Begin by selecting the Admin Role Category. Then choose a Launch Effective Date and then one or more roles – these compose an “Access Criteria Bundle”. More than one Bundle can be requested at a time.

**i** If Epic Admin Role access is required for a new user, follow the steps on Page 19.

## Request Epic Admin Access for an Existing End-User

ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
The **AHS IAM Login** screen appears

Note the many access links to the **Support Page** for IAM news, information and learning materials. You can also access the **Support Page** once logged in.



ENTER your **Username** and **Password**

CLICK ➡ **Log in**

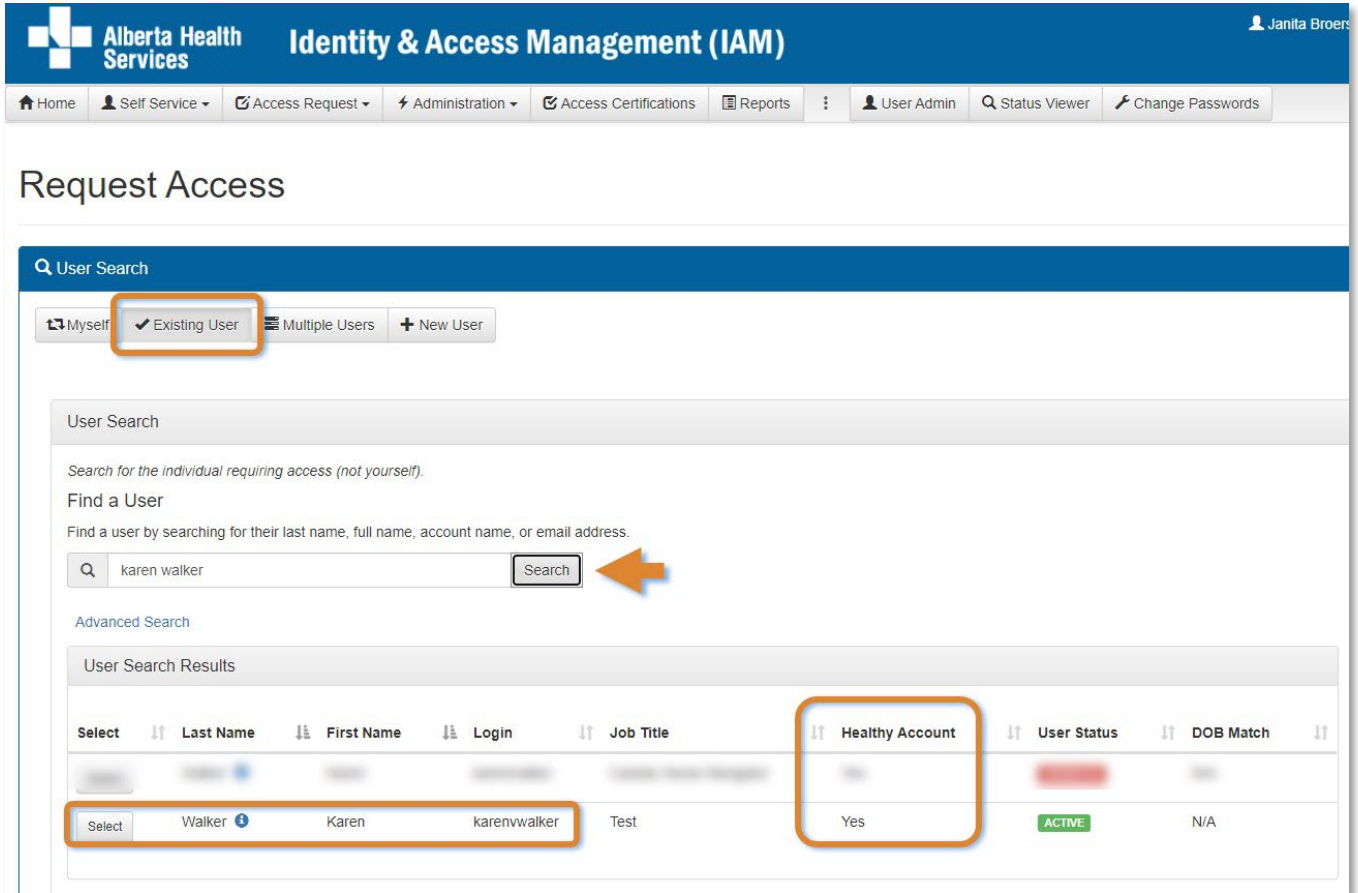
The **AHS IAM** 🏠 **Home** screen appears

CLICK **Request** or **Modify Access**

The **Request Access** screen appears with ✓ **Existing User** selected



SEARCH for the existing end-user using the simple or [Advanced Search](#) functions  
[User Search Results](#) appear



**Request Access**

**User Search**

Myself **Existing User** Multiple Users + New User

**User Search**

Search for the individual requiring access (not yourself).

**Find a User**

Find a user by searching for their last name, full name, account name, or email address.

Q karen walker Search

**Advanced Search**

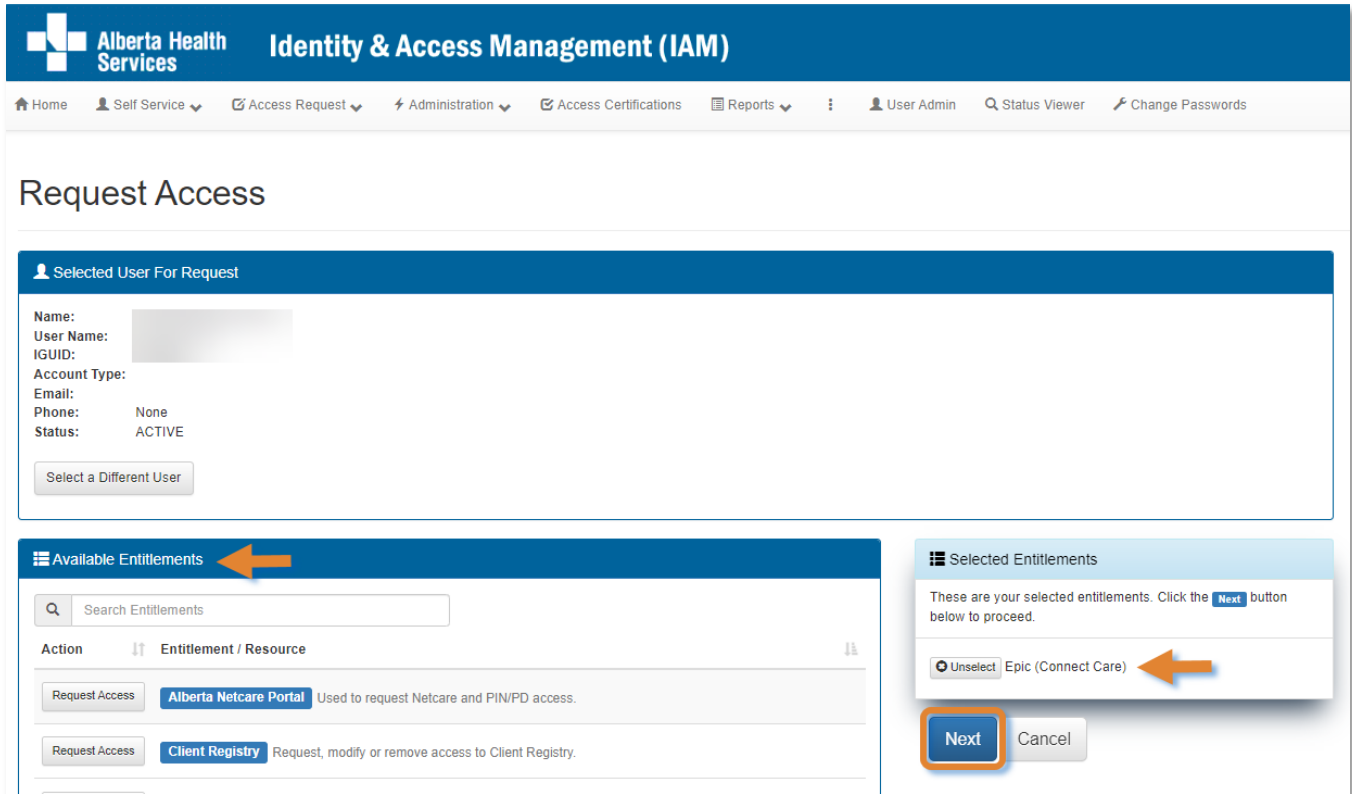
**User Search Results**

Select	Last Name	First Name	Login	Job Title	Healthy Account	User Status	DOB Match
Select	Walker	Karen	karenvwalker	Test	Yes	ACTIVE	N/A

NOTICE in our example, the [Existing User](#) already has an AHS Network User ID / [Healthy Account](#)

SELECT the end-user

The **Request Access** screen appears with the end-user's details displayed in the [Selected User For Request](#) pane followed by a list of Available Entitlements



**Request Access**

**Selected User For Request**

Name: [Redacted]  
 User Name: [Redacted]  
 IGUID: [Redacted]  
 Account Type: [Redacted]  
 Email: [Redacted]  
 Phone: None  
 Status: ACTIVE

Select a Different User

**Available Entitlements**

Search Entitlements

Action	Entitlement / Resource
Request Access	<b>Alberta Netcare Portal</b> Used to request Netcare and PIN/PD access.
Request Access	<b>Client Registry</b> Request, modify or remove access to Client Registry.

**Selected Entitlements**

These are your selected entitlements. Click the **Next** button below to proceed.

☐ Unselect **Epic (Connect Care)**

**Next** Cancel

Under **Available Entitlements**, at **Epic (Connect Care)**, CLICK **Request Access**

**i** If the button says **Change Access**, the end-user already had Epic (Connect Care) access from another launch. You can modify their current access OR request access for a different Launch.

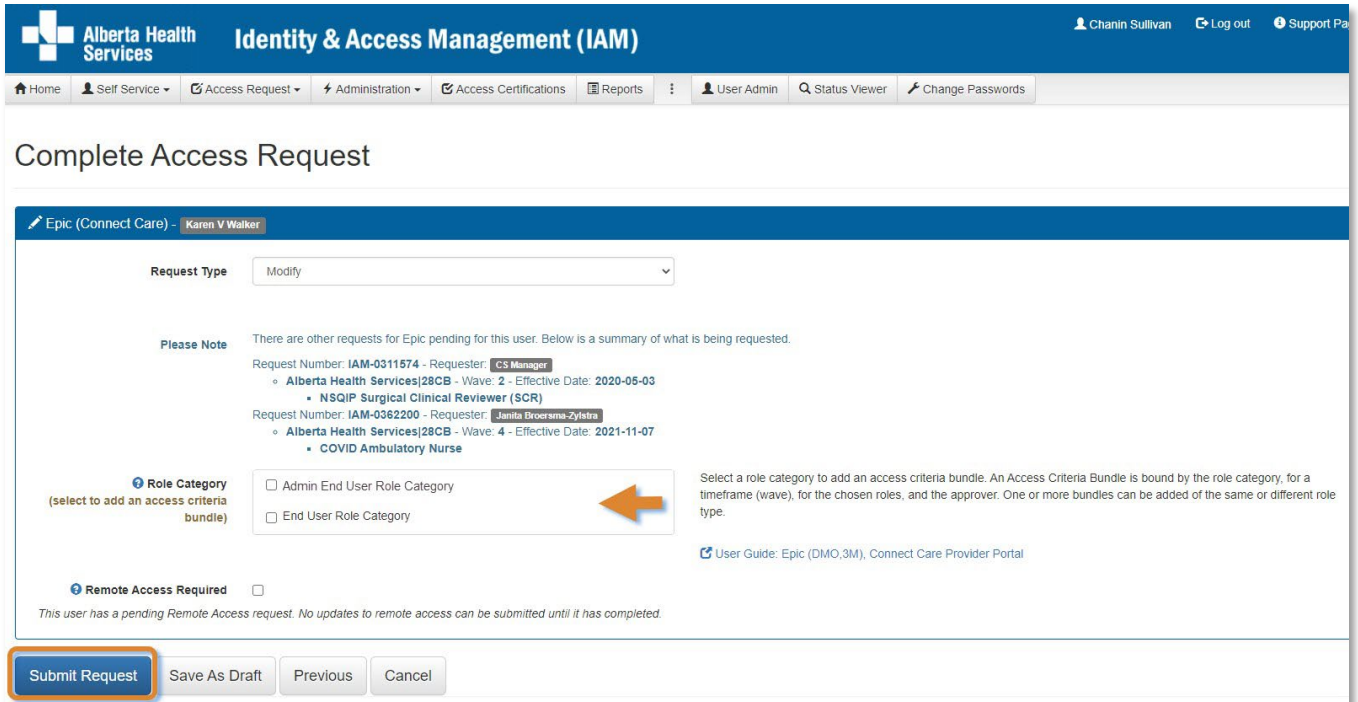
The screen refreshes and the **Selected Entitlements** pane appears with **Epic (Connect Care)** displayed.

CLICK **Next**

The **Complete Access Request** screen appears

If there are pending requests for the end-user, that information will be displayed. Go ahead with a new request but do not duplicate a pending request.





**Complete Access Request**

Epic (Connect Care) - Karen V Walker

**Request Type** Modify

**Please Note** There are other requests for Epic pending for this user. Below is a summary of what is being requested.

Request Number: IAM-0311574 - Requester: CS Manager

- Alberta Health Services|28CB - Wave: 2 - Effective Date: 2020-05-03
  - NSQIP Surgical Clinical Reviewer (SCR)

Request Number: IAM-0362200 - Requester: Janita Broersma-Zylstra

- Alberta Health Services|28CB - Wave: 4 - Effective Date: 2021-11-07
  - COVID Ambulatory Nurse

**Role Category** (select to add an access criteria bundle)

☐ Admin End User Role Category

☐ End User Role Category

Select a role category to add an access criteria bundle. An Access Criteria Bundle is bound by the role category, for a timeframe (wave), for the chosen roles, and the approver. One or more bundles can be added of the same or different role type.

[User Guide: Epic \(DMO,3M\), Connect Care Provider Portal](#)

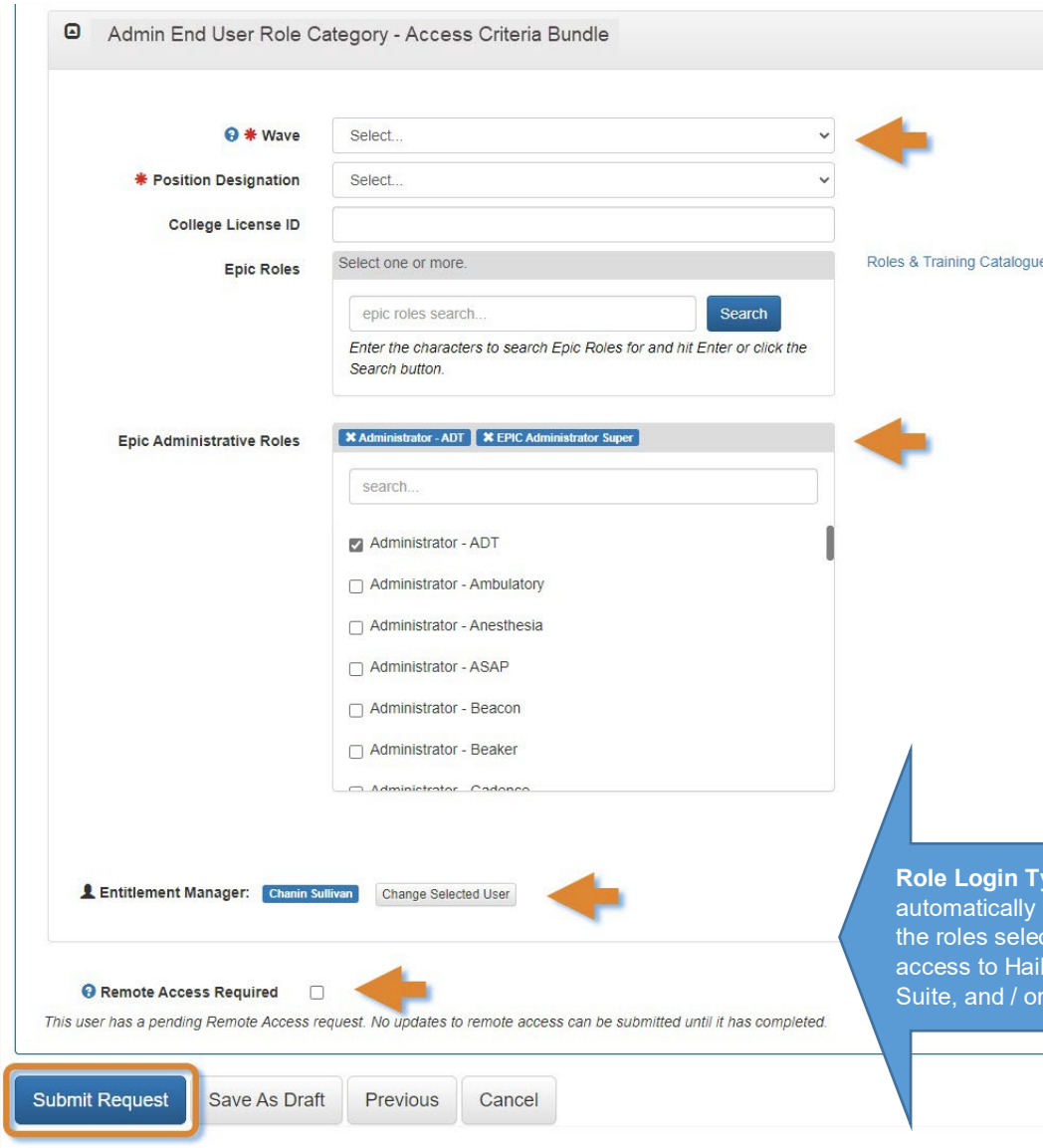
**Remote Access Required** ☐

*This user has a pending Remote Access request. No updates to remote access can be submitted until it has completed.*

**Submit Request** Save As Draft Previous Cancel

## SELECT Admin End User Role Category

The screen refreshes to display an **Admin End User Role Category – Access Criteria Bundle**. You can submit more than one bundle at a time. CLICK the **Admin End User Role Category** as many times as needed.



**Admin End User Role Category - Access Criteria Bundle**

Wave: Select...

Position Designation: Select...

College License ID:

Epic Roles: Select one or more.

epic roles search... Search

Enter the characters to search Epic Roles for and hit Enter or click the Search button.

Epic Administrative Roles: ☒ Administrator - ADT ☒ EPIC Administrator Super

search...

☒ Administrator - ADT

☐ Administrator - Ambulatory

☐ Administrator - Anesthesia

☐ Administrator - ASAP

☐ Administrator - Beacon

☐ Administrator - Beaker

☐ Administrator - Cadence

Entitlement Manager: Chanin Sullivan Change Selected User

Remote Access Required ☐

This user has a pending Remote Access request. No updates to remote access can be submitted until it has completed.

Submit Request Save As Draft Previous Cancel

Roles & Training Catalogue

**Role Login Type Selections** will automatically be displayed here IF the roles selected might require access to Haiku/Canto, Rover, Web Suite, and / or Willow Ambulatory.

SELECT the **Launch**

The pane will refresh to include launch specific details

ENTER **Position Designation**

ENTER **College License ID** as needed

IF **Epic Roles** are also required, SEARCH for and SELECT role(s) as needed

SELECT the **Epic Administrative Roles** as needed

ACCEPT or CHANGE the [Entitlement Manager](#) if displayed  
OR

SEARCH for and SELECT an [Entitlement Manager / Authorized Approver](#) if one is not displayed

If [Role Type Selections](#) are displayed SELECT the [Login Type Roles](#) required.

[Role Login Types](#) are only displayed for Epic (Connect Care) roles that may need access to the Executive Web Dashboard, Haiku/Canto, Rover, and Willow Ambulatory.

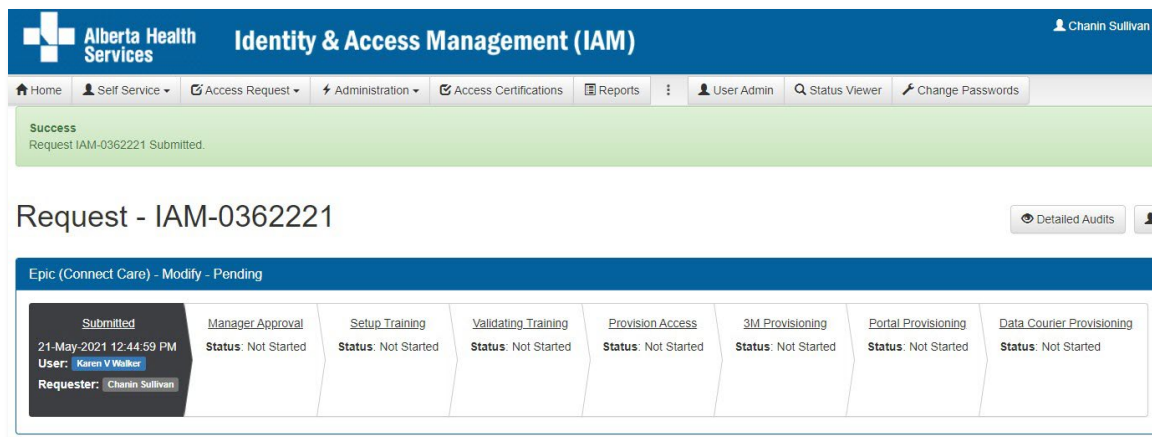
Consult the [Login Type Guide](#) for more information if needed. You'll see it is also linked right in the form.

SELECT [Remote Access Required](#) if the end-user will need to access Epic outside an AHS facility.

Select this even if the end-user has an RSA SecurID token already. This will ensure that token and their Epic access are linked. Click to read more in the [Remote access \(RUNA\) with RSA SecurID tokens Fact Sheet](#).

CLICK [Submit Request](#)

The **Request Status** screen will appear



**Success**  
Request IAM-0362221 Submitted.

**Request - IAM-0362221**

Epic (Connect Care) - Modify - Pending

Submitted	Manager Approval	Setup Training	Validating Training	Provision Access	3M Provisioning	Portal Provisioning	Data Courier Provisioning
21-May-2021 12:44:59 PM User: <a href="#">Karen V Walker</a> Requester: <a href="#">Chanin Sullivan</a>	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started

NOTICE the on-screen message, "[Success Request IAM-##### Submitted.](#)", shaded in green, is displayed in the top left corner of the screen.

The request steps and their statuses display. As each step is satisfied, the statuses will automatically update. Those that do not apply will be automatically skipped.

TRACK the progress of the request under [Request Status](#)

CLICK on the [Request](#) number for more details.

The **AHS IAM**  **Home** screen appears

Complete 

## SECTION 3 – CMIO ROLE CATEGORY

**i** CMIO Roles are only visible to and can only be requested by specific individuals for Physicians and Clinicians. They are provided one-stop shopping with all Launches and Role types available to them and the ability to request multiple Access Criteria Bundles at the same time.

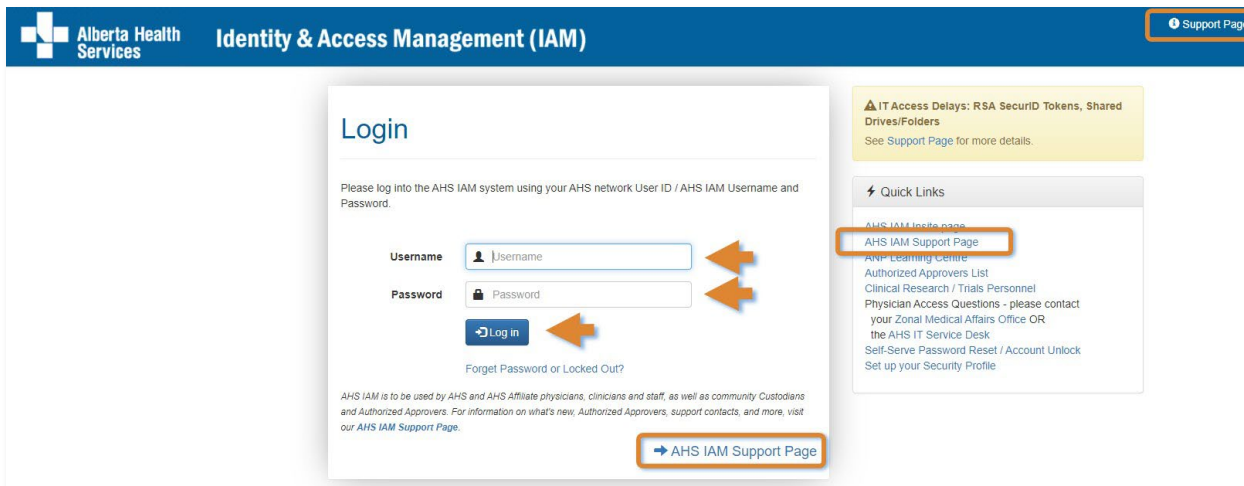
**i** Begin by selecting CMIO Role Category. Then choose a Launch Effective Date and then one or more roles – these compose an “Access Criteria Bundle”. More than one Bundle can be requested at a time.

**i** If CMIO Role access is required for a new user, follow the steps provided.

## Request CMIO Role Access for an Existing End-User

ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
The **AHS IAM Login** screen appears

Note the many access links to the **Support Page** for IAM news, information and learning materials. You can also access the **Support Page** once logged in.



ENTER your **Username** and **Password**

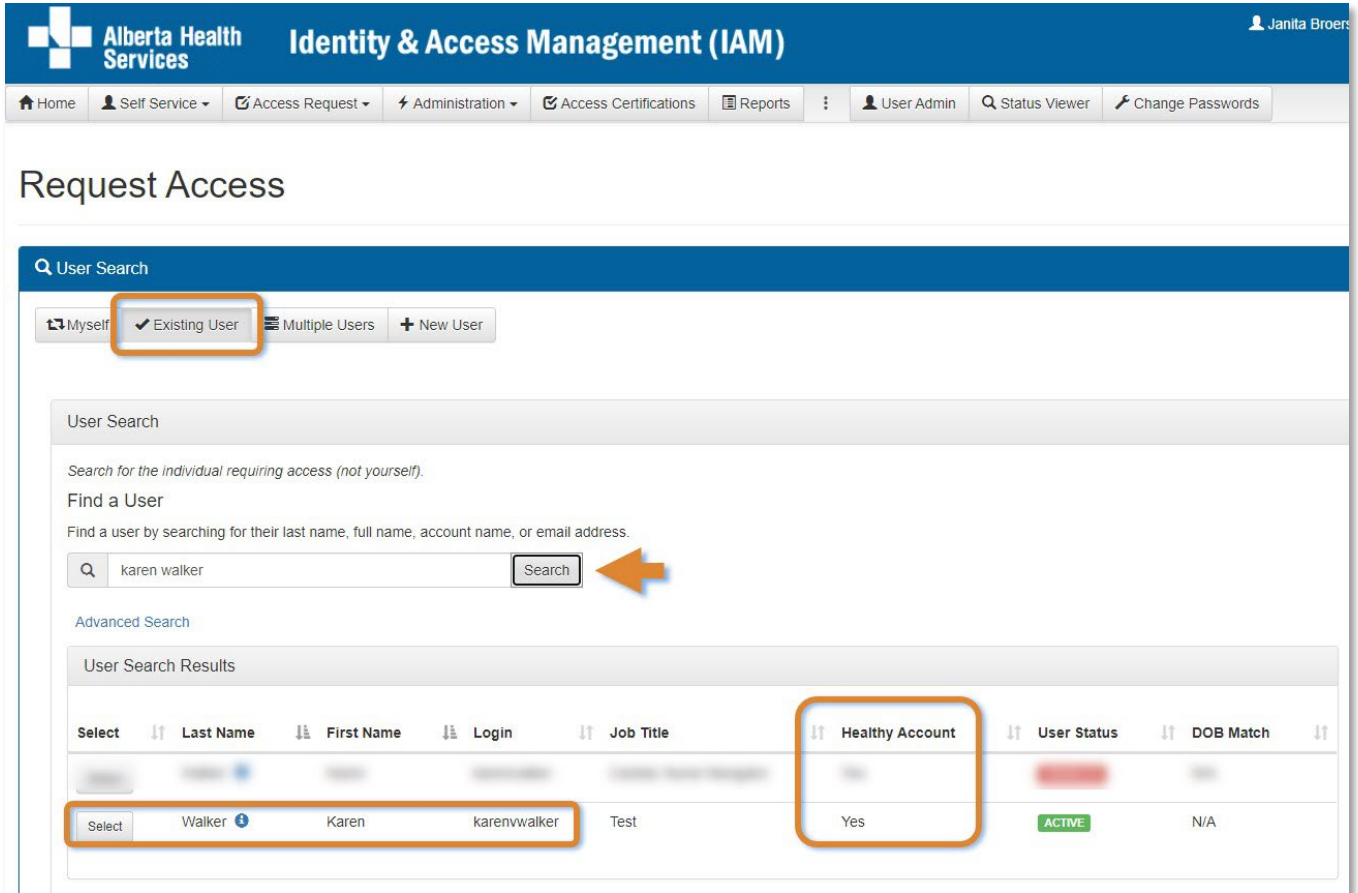
CLICK ➡ **Log in**

The **AHS IAM** 🏠 **Home** screen appears

CLICK **Request** or **Modify Access**

The **Request Access** screen appears with ✓ **Existing User** selected

SEARCH for the existing end-user using the simple or [Advanced Search](#) functions  
[User Search Results](#) appear



**Request Access**

**User Search**

Myself **Existing User** Multiple Users New User

**User Search**

Search for the individual requiring access (not yourself).

**Find a User**

Find a user by searching for their last name, full name, account name, or email address.

Q karen walker Search

**Advanced Search**

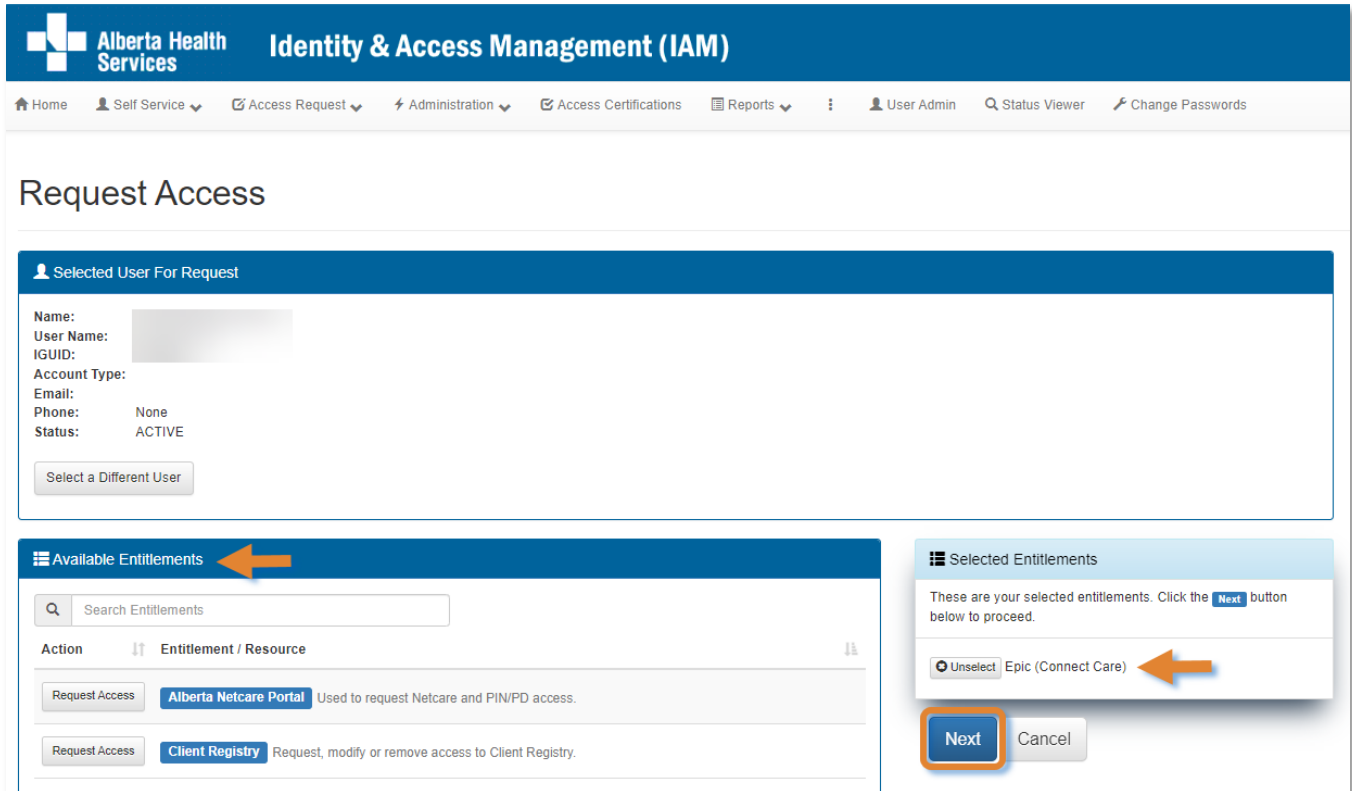
**User Search Results**

Select	Last Name	First Name	Login	Job Title	Healthy Account	User Status	DOB Match
Select	Walker	Karen	karenvwalker	Test	Yes	ACTIVE	N/A

NOTICE in our example, the [Existing User](#) already has an AHS Network User ID / [Healthy Account](#)

SELECT the end-user

The **Request Access** screen appears with the end-user's details displayed in the [Selected User For Request](#) pane followed by a list of Available Entitlements



**Request Access**

**Selected User For Request**

Name: [Redacted]  
 User Name: [Redacted]  
 IGUID: [Redacted]  
 Account Type: [Redacted]  
 Email: [Redacted]  
 Phone: None  
 Status: ACTIVE

Select a Different User

**Available Entitlements**

Search Entitlements

Action	Entitlement / Resource
Request Access	<b>Alberta Netcare Portal</b> Used to request Netcare and PIN/PD access.
Request Access	<b>Client Registry</b> Request, modify or remove access to Client Registry.

**Selected Entitlements**

These are your selected entitlements. Click the **Next** button below to proceed.

☐ Unselect **Epic (Connect Care)**

**Next** Cancel

Under **Available Entitlements**, at **Epic (Connect Care)**, CLICK **Request Access**

**i** If the button says **Change Access**, the end-user already had Epic (Connect Care) access from another launch. You can modify their current access OR request access for a different Launch.

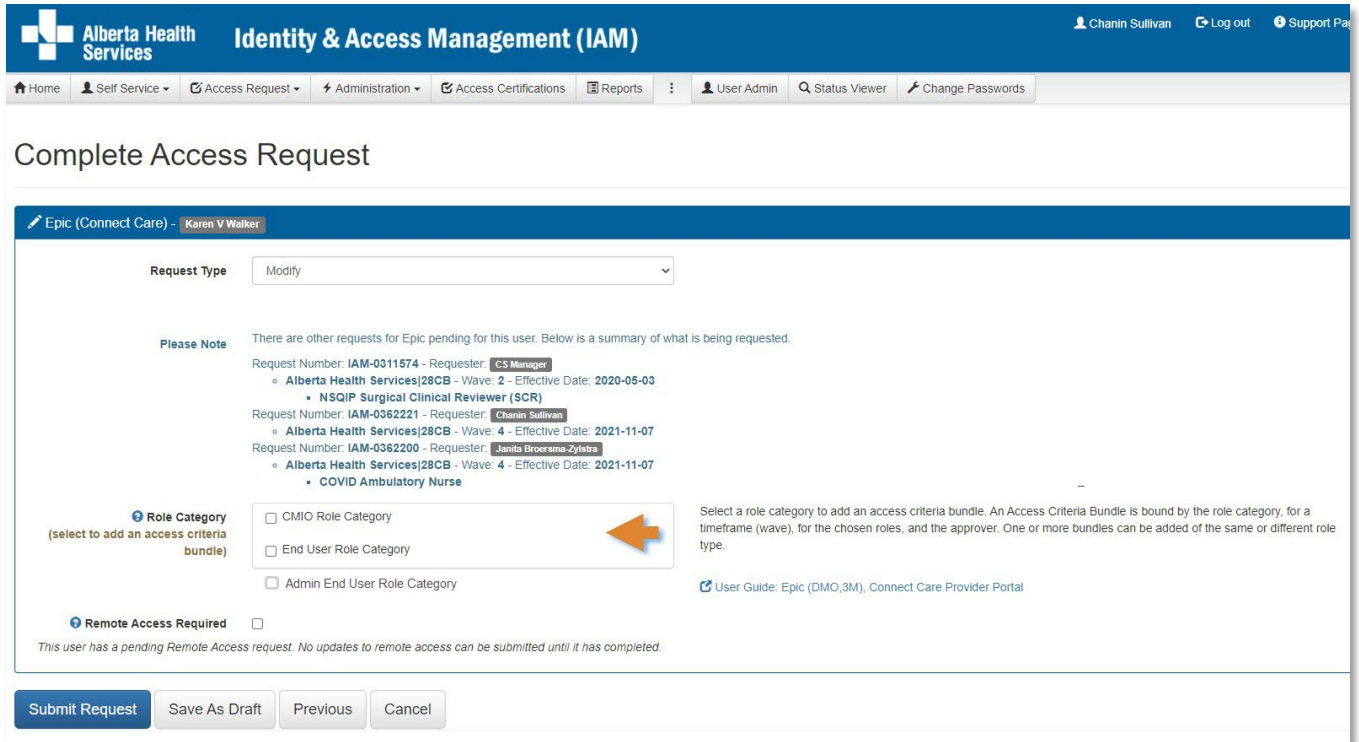
The screen refreshes and the **Selected Entitlements** pane appears with **Epic (Connect Care)** displayed.

CLICK **Next**

The **Complete Access Request** screen appears

If there are pending requests for the end-user, that information will be displayed. Go ahead with a new request but do not duplicate a pending request.





**Complete Access Request**

Epic (Connect Care) - Karen V Walker

**Request Type** Modify

**Please Note** There are other requests for Epic pending for this user. Below is a summary of what is being requested.

- Request Number: IAM-0311574 - Requester: CS Manager
  - Alberta Health Services|28CB - Wave: 2 - Effective Date: 2020-05-03
    - NSQIP Surgical Clinical Reviewer (SCR)
- Request Number: IAM-0362221 - Requester: Chanin Sullivan
  - Alberta Health Services|28CB - Wave: 4 - Effective Date: 2021-11-07
- Request Number: IAM-0362200 - Requester: Janita Broersma-Zylstra
  - Alberta Health Services|28CB - Wave: 4 - Effective Date: 2021-11-07
    - COVID Ambulatory Nurse

**Role Category** (select to add an access criteria bundle)

☐ CMIO Role Category

☐ End User Role Category

☐ Admin End User Role Category

**Remote Access Required** ☐

This user has a pending Remote Access request. No updates to remote access can be submitted until it has completed.

Select a role category to add an access criteria bundle. An Access Criteria Bundle is bound by the role category, for a timeframe (wave), for the chosen roles, and the approver. One or more bundles can be added of the same or different role type.

[User Guide: Epic \(DMO,3M\), Connect Care Provider Portal](#)

Submit Request Save As Draft Previous Cancel

## SELECT CMIO Role Category

The screen refreshes to display a **CMIO Role Category – Access Criteria Bundle**

You can submit more than one bundle at a time. CLICK the CMIO Role Category as many times as needed.



SELECT the [Launch](#)

The pane will refresh to  
include launch specific  
details

ENTER [Position Designation](#)

ENTER [College License ID](#) as  
needed

IF [Epic Roles](#) are also required,  
SEARCH for and SELECT  
role(s) as needed

SELECT the [Epic CMIO Roles](#)  
as needed

IF [Administrative Roles](#) are also  
required, SEARCH for and  
SELECT role(s) as needed

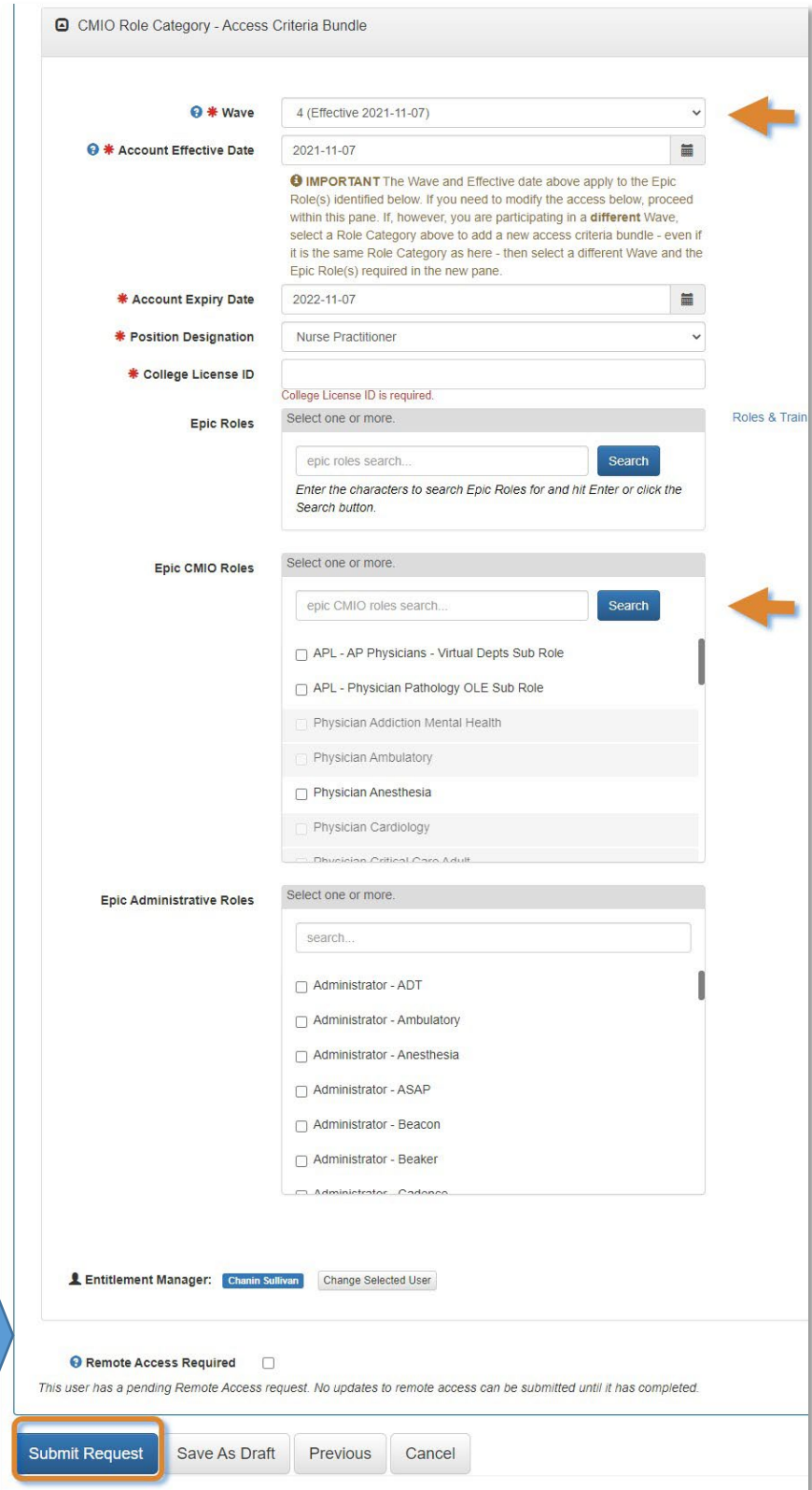
IF displayed SELECT or  
VERIFY any Dragon Medical  
One (DMO) or 3M access details

ACCEPT or CHANGE the  
[Entitlement Manager](#) if displayed

OR

SEARCH for and SELECT an  
[Entitlement Manager /  
Authorized Approver](#) if one is not  
displayed

**Role Login Type Selections** will  
automatically be displayed here IF  
the roles selected might require  
access to Haiku/Canto, Rover, Web  
Suite, and / or Willow Ambulatory.



CMIO Role Category - Access Criteria Bundle

**Wave** 4 (Effective 2021-11-07)

**Account Effective Date** 2021-11-07

**Account Expiry Date** 2022-11-07

**Position Designation** Nurse Practitioner

**College License ID** College License ID is required.

**Epic Roles** Select one or more.  
epic roles search... Search  
Enter the characters to search Epic Roles for and hit Enter or click the Search button.

**Epic CMIO Roles** Select one or more.  
epic CMIO roles search... Search

- ☐ APL - AP Physicians - Virtual Depts Sub Role
- ☐ APL - Physician Pathology OLE Sub Role
- ☐ Physician Addiction Mental Health
- ☐ Physician Ambulatory
- ☐ Physician Anesthesia
- ☐ Physician Cardiology
- ☐ Physician Critical Care Adult

**Epic Administrative Roles** Select one or more.  
search...

- ☐ Administrator - ADT
- ☐ Administrator - Ambulatory
- ☐ Administrator - Anesthesia
- ☐ Administrator - ASAP
- ☐ Administrator - Beacon
- ☐ Administrator - Beaker
- ☐ Administrator - Cadence

**Entitlement Manager:** Chanin Sullivan Change Selected User

**Remote Access Required** ☐  
This user has a pending Remote Access request. No updates to remote access can be submitted until it has completed.

**Submit Request** Save As Draft Previous Cancel

If [Role Type Selections](#) are displayed SELECT the [Login Type Roles](#) required.

[Role Login Types](#) are only displayed for Epic (Connect Care) roles that may need access to the Executive Web Dashboard, Haiku/Canto, Rover, and Willow Ambulatory.

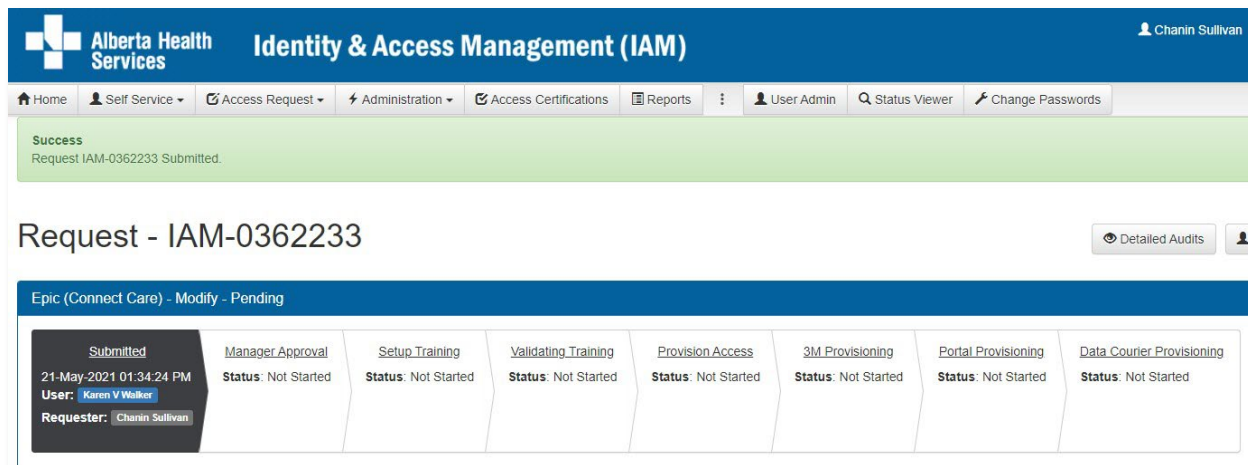
Consult the [Login Type Guide](#) for more information if needed. You'll see it is also linked right in the form.

SELECT [Remote Access Required](#) if the end-user will need to access Epic outside an AHS facility.

Select this even if the end-user has an RSA SecurID token already. This will ensure that token and their Epic access are linked. Click to read more in the [Remote access \(RUNA\) with RSA SecurID tokens Fact Sheet](#).

CLICK [Submit Request](#)

The **Request Status** screen will appear



**Success**  
Request IAM-0362233 Submitted.

Request - IAM-0362233 [Detailed Audits](#)

Epic (Connect Care) - Modify - Pending

Submitted	Manager Approval	Setup Training	Validating Training	Provision Access	3M Provisioning	Portal Provisioning	Data Courier Provisioning
21-May-2021 01:34:24 PM User: <a href="#">Karen V Walker</a> Requester: <a href="#">Charan Sullivan</a>	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started

NOTICE the on-screen message, “[Success Request IAM-##### Submitted.](#)”, shaded in green, is displayed in the top left corner of the screen.


The request steps and their statuses display. As each step is satisfied, the statuses will automatically update. Those that do not apply will be automatically skipped.

CLICK [Home](#)

The **AHS IAM Home** screen appears


TRACK the progress of the request under [Request Status](#)

Request Status				
Request	Requested	Status - Access - Type	User	Requester
IAM-0362234	21-May-2021 01:34 PM	Pending - Epic (Connect Care) DMO - New	Karen V Walker	Chanin Sullivan
<a href="#">Show All</a>				

You can monitor the progress of this request on the **AHS IAM**  **Home** screen. In the [Request Status](#) pane, you will see the request and its statuses listed.

CLICK on the [Request](#) number for more details.

As the Requester you will also be sent email notifications from Identity Management as the request progresses through to completion.


**Alberta Health  
Services**

**Identity & Access Management (IAM)**

[Home](#)
[Self Service](#)
[Access Request](#)
[Administration](#)
[Access Certifications](#)

## Request - IAM-0362234

Epic (Connect Care) DMO - New - Pending

<u>Submitted</u> 21-May-2021 01:34:55 PM <b>User:</b> Karen V Walker <b>Requester:</b> Chanin Sullivan	<u>Waiting for EPIC Account Provisioning</u> 21-May-2021 01:34:56 PM <b>Status:</b> Completed <b>Result:</b> Success	<u>DMO Provisioning</u> 21-May-2021 01:34:56 PM <b>Status:</b> Waiting <a href="#">Work Item Details</a>
---	---	---

CLICK  [Home](#)

The **AHS IAM**  **Home** screen appears

Complete 

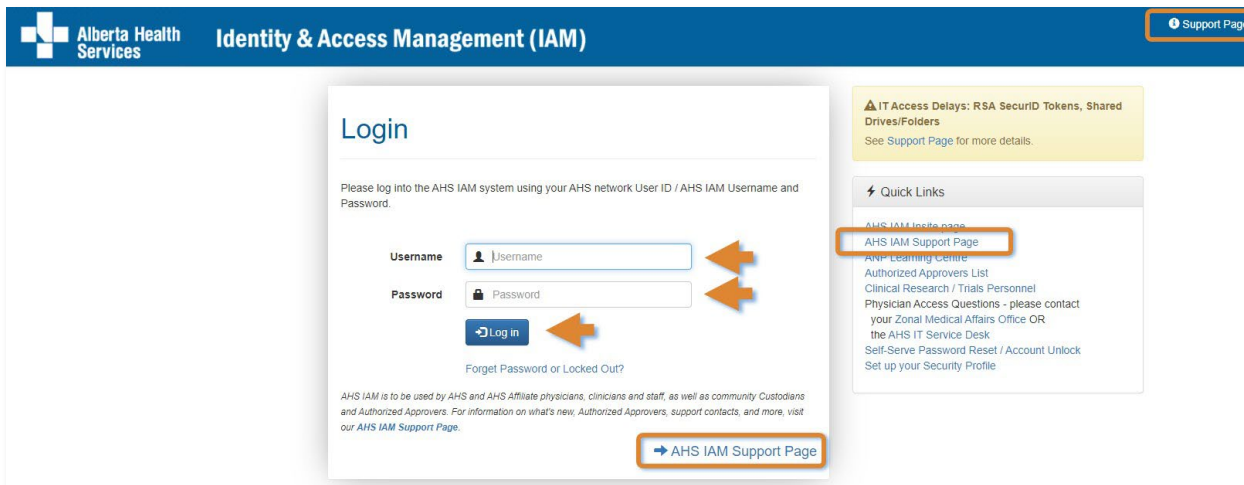
## SECTION 4 – CONNECT CARE PROVIDER PORTAL ROLE CATEGORY

### Request Connect Care Provider Portal Access for a New End-User

! You may request [Epic Roles](#) OR [Connect Care Provider Portal Roles](#). You may not select both unless you are part of a specific study group.

ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
The **AHS IAM Login** screen appears

Note the many access links to the **Support Page** for IAM news, information and learning materials. You can also access the **Support Page** once logged in.



ENTER your [Username](#) and [Password](#)

CLICK ➡ [Log in](#)

The **AHS IAM** 🏠 **Home** screen appears

CLICK [Request](#) or [Modify Access](#)

The **Request Access** screen appears with ✓ [Existing User](#) selected

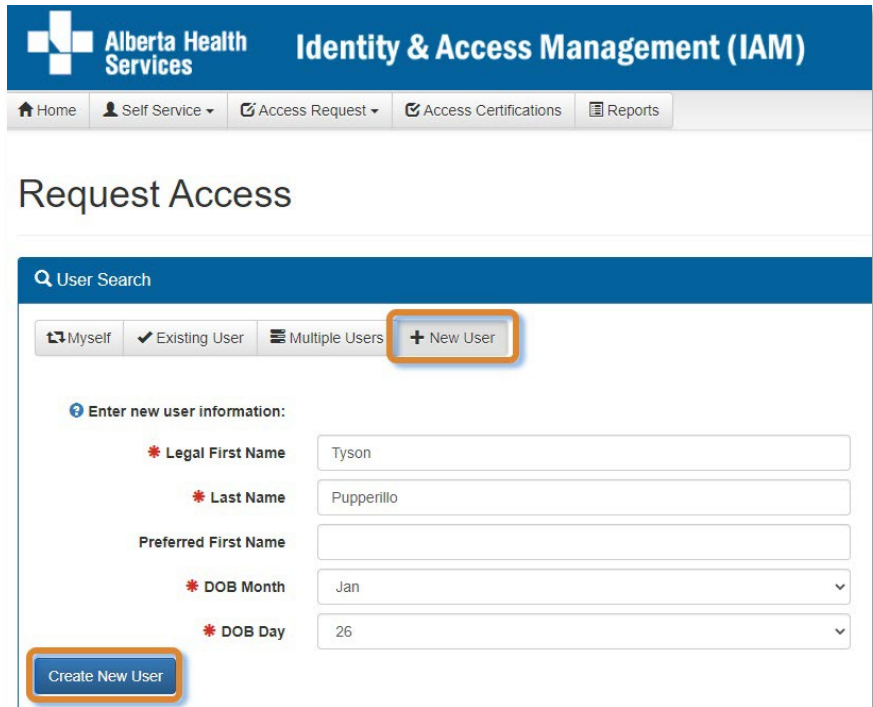
## SELECT [New User](#)

The screen refreshes to capture the end-user's information. Choose this option when the end-user does not have an AHS Network UserID and is not onboarded or paid through AHS e-People. See [IAM Definitions](#) for more information.

## ENTER the required information

## CLICK [Create New User](#)

The **Request Access** screen appears with the new user's information populated under [Selected User For Request](#)



**Alberta Health Services Identity & Access Management (IAM)**

Home Self Service Access Request Access Certifications Reports

### Request Access

Q User Search

Myself Existing User Multiple Users **+ New User**

Enter new user information:

\* Legal First Name Tyson

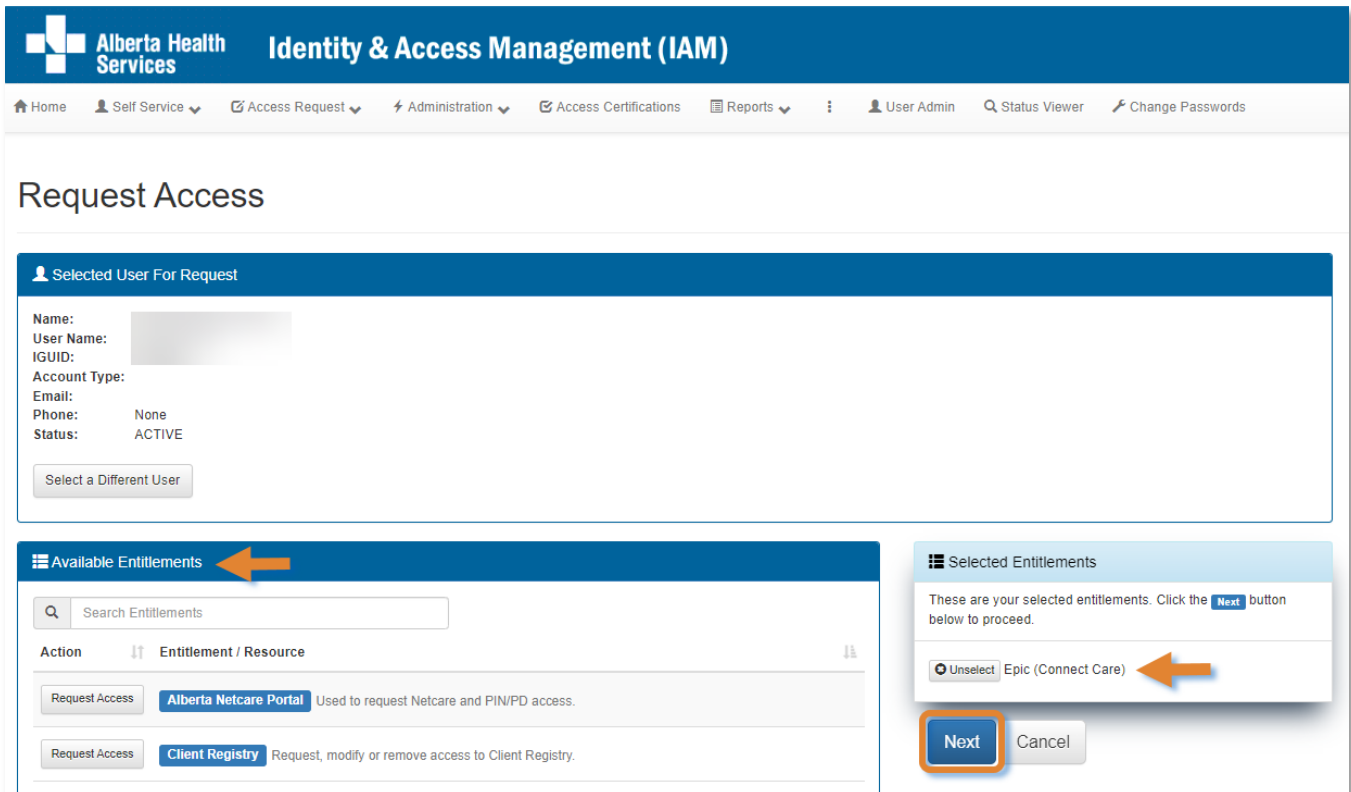
\* Last Name Pupperillo

Preferred First Name

\* DOB Month Jan

\* DOB Day 26

**Create New User**



**Alberta Health Services Identity & Access Management (IAM)**

Home Self Service Access Request Administration Access Certifications Reports User Admin Status Viewer Change Passwords

### Request Access

Selected User For Request

Name: User Name: IGUID: Account Type: Email: Phone: None Status: ACTIVE

Select a Different User

**Available Entitlements**

Search Entitlements

Action	Entitlement / Resource
Request Access	<b>Alberta Netcare Portal</b> Used to request Netcare and PIN/PD access.
Request Access	<b>Client Registry</b> Request, modify or remove access to Client Registry.

**Selected Entitlements**

These are your selected entitlements. Click the **Next** button below to proceed.

☒ Unselect Epic (Connect Care)

**Next** Cancel

Under [Available Entitlements](#) at Epic (Connect Care) CLICK [Request Access](#)

The screen refreshes and the [Selected Entitlements](#) pane appears with [Epic \(Connect Care\)](#) displayed.

CLICK [Next](#)

The **Complete Access screen** appears with the [Network Access Request \(NAR\)](#) pane displayed followed by the [Epic \(Connect Care\)](#) pane. This is because the new end-user must get an AHS Network UserID in order to access MyLearningLink for Connect Care Provider Portal training requirements.

## Complete the Network Access Request (NAR) Pane

ENTER all mandatory information and as much optional information as possible

At [User Type](#), SELECT Community

There may be situations when a community end-user is also an Employee or Non-Employee. See [IAM Definitions](#) for more information.



## Complete the Epic (Connect Care) Pane

SELECT **Connect Care Provider Portal Role Category**

The screen refreshes to display a **CMIO Role Category – Access Criteria Bundle**

You can submit more than one access bundle at a time. CLICK the **Connect Care Provider Portal Role Category** as many times as needed.

SELECT **Facilities**

SELECT the **Launch**

The pane will refresh to include launch specific details

ACCEPT or CHANGE the **Account Expiry Date**

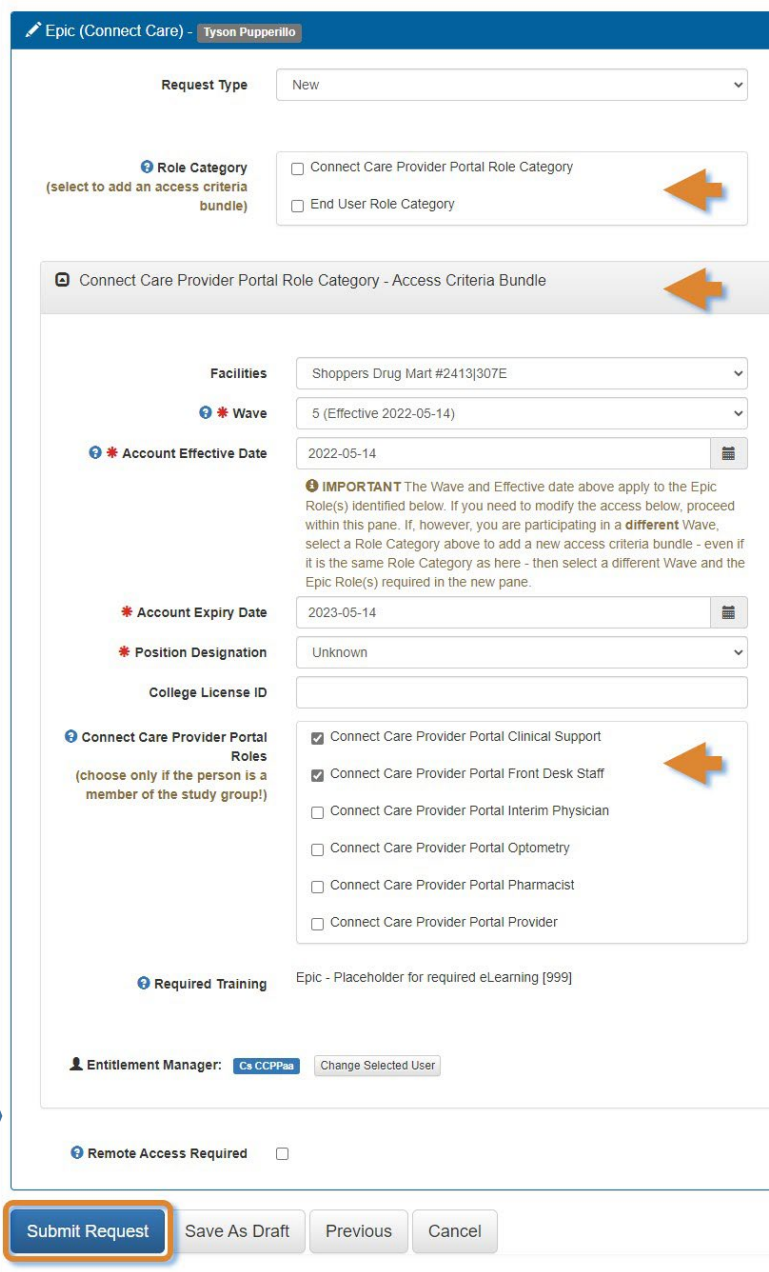
ENTER **Position Designation**

ENTER **College License ID** as needed

SELECT **Connect Care Provider Portal Roles**

**Required Training** will display for its corresponding CCPP role

**Role Login Type Selections** will automatically be displayed here IF the roles selected might require access to Haiku/Canto, Rover, Web Suite, and / or Willow Ambulatory.



**Epic (Connect Care) - Tyson Pupperillo**

**Request Type**: New

**Role Category** (select to add an access criteria bundle):

- ☐ Connect Care Provider Portal Role Category
- ☐ End User Role Category

**Connect Care Provider Portal Role Category - Access Criteria Bundle**

**Facilities**: Shoppers Drug Mart #2413|307E

**Wave**: 5 (Effective 2022-05-14)

**Account Effective Date**: 2022-05-14

**Account Expiry Date**: 2023-05-14

**Position Designation**: Unknown

**College License ID**

**Connect Care Provider Portal Roles** (choose only if the person is a member of the study group!):

- ☒ Connect Care Provider Portal Clinical Support
- ☒ Connect Care Provider Portal Front Desk Staff
- ☐ Connect Care Provider Portal Interim Physician
- ☐ Connect Care Provider Portal Optometry
- ☐ Connect Care Provider Portal Pharmacist
- ☐ Connect Care Provider Portal Provider

**Required Training**: Epic - Placeholder for required eLearning [999]

**Entitlement Manager**: Cx CCPPaa [Change Selected User](#)

**Remote Access Required**: ☐

**Buttons**: Submit Request, Save As Draft, Previous, Cancel

ACCEPT or CHANGE the [Entitlement Manager](#) if displayed  
OR

SEARCH for and SELECT an [Entitlement Manager / Authorized Approver](#) if one is not displayed

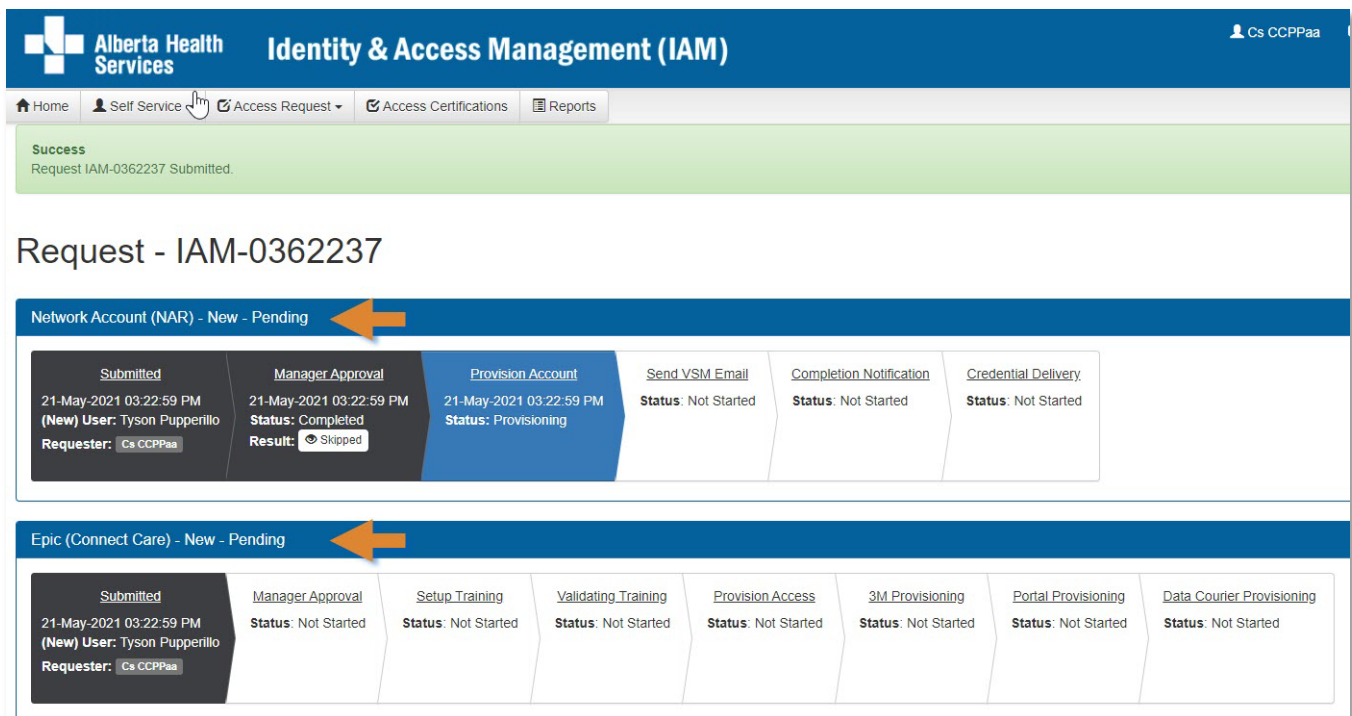
[Role Login Types](#) are only displayed for Epic (Connect Care) roles that may need access to the Executive Web Dashboard, Haiku/Canto, Rover, and Willow Ambulatory.

Consult the [Login Type Guide](#) for more information if needed. You'll see it is also linked right in the form.

SELECT [Remote Access Required](#) even if the end-user already has an AHS RSA SecurID Token. Follow the steps on Page 21. Click to read more in the [Remote access \(RUNA\) with RSA SecurID tokens Fact Sheet](#).

CLICK [Submit Request](#)

The **Request Status** screen will appear



**Identity & Access Management (IAM)**

Home | Self Service | Access Request | Access Certifications | Reports

**Success**  
Request IAM-0362237 Submitted.

## Request - IAM-0362237

**Network Account (NAR) - New - Pending**

Submitted	Manager Approval	Provision Account	Send VSM Email	Completion Notification	Credential Delivery
21-May-2021 03:22:59 PM (New) User: Tyson Pupperillo Requester: Cs CCPPaa	21-May-2021 03:22:59 PM Status: Completed Result: Skipped	21-May-2021 03:22:59 PM Status: Provisioning	Status: Not Started	Status: Not Started	Status: Not Started

**Epic (Connect Care) - New - Pending**

Submitted	Manager Approval	Setup Training	Validating Training	Provision Access	3M Provisioning	Portal Provisioning	Data Courier Provisioning
21-May-2021 03:22:59 PM (New) User: Tyson Pupperillo Requester: Cs CCPPaa	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started


NOTICE the on-screen message, "[Success Request IAM-##### Submitted.](#)", shaded in green, is displayed in the top left corner of the screen.

The request steps and their statuses display. As each step is satisfied, the statuses will automatically update. Those that do not apply will be automatically skipped.

NOTICE there are two entitlement status bars displayed: one for the [Network Access Request \(NAR\)](#) and one for the [Epic \(Connect Care\)](#) Connect Care Provider Portal access request.



CLICK  [Home](#)

You can monitor the progress of this request on the **AHS IAM**  **Home** screen. In the [Request Status](#) pane, you will see the request and its statuses listed.

CLICK on the [Request](#) number for more details

CLICK  Home

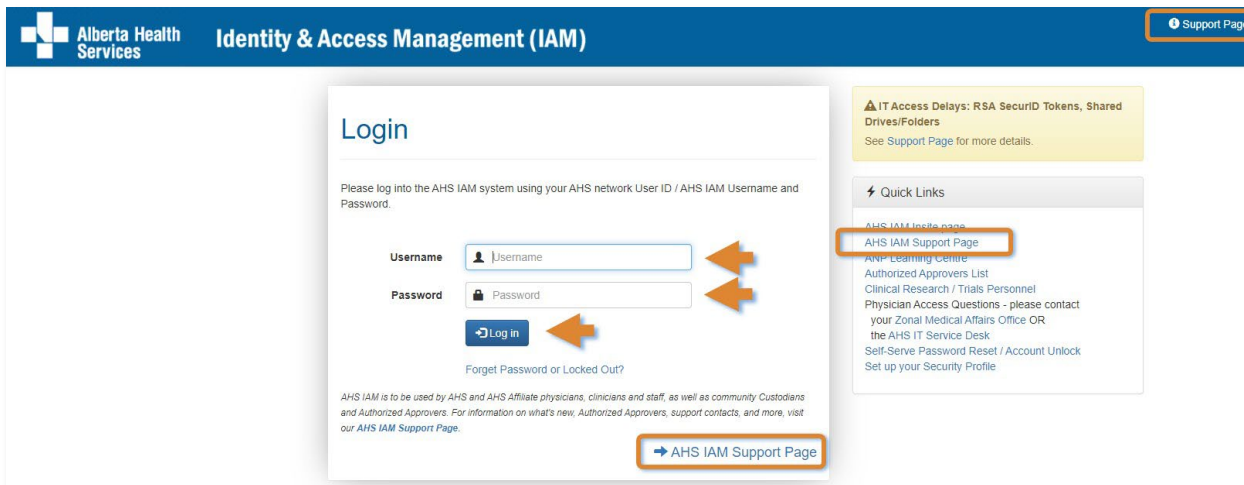
Complete 

## Request Connect Care Provider Portal Access for an Existing End-User

! You may request [Epic Roles](#) OR [Connect Care Provider Portal Roles](#). You may not select both unless you are part of a specific study group.

ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
The **AHS IAM Login** screen appears

Note the many access links to the **Support Page** for IAM news, information and learning materials. You can also access the **Support Page** once logged in.



ENTER your [Username](#) and [Password](#)

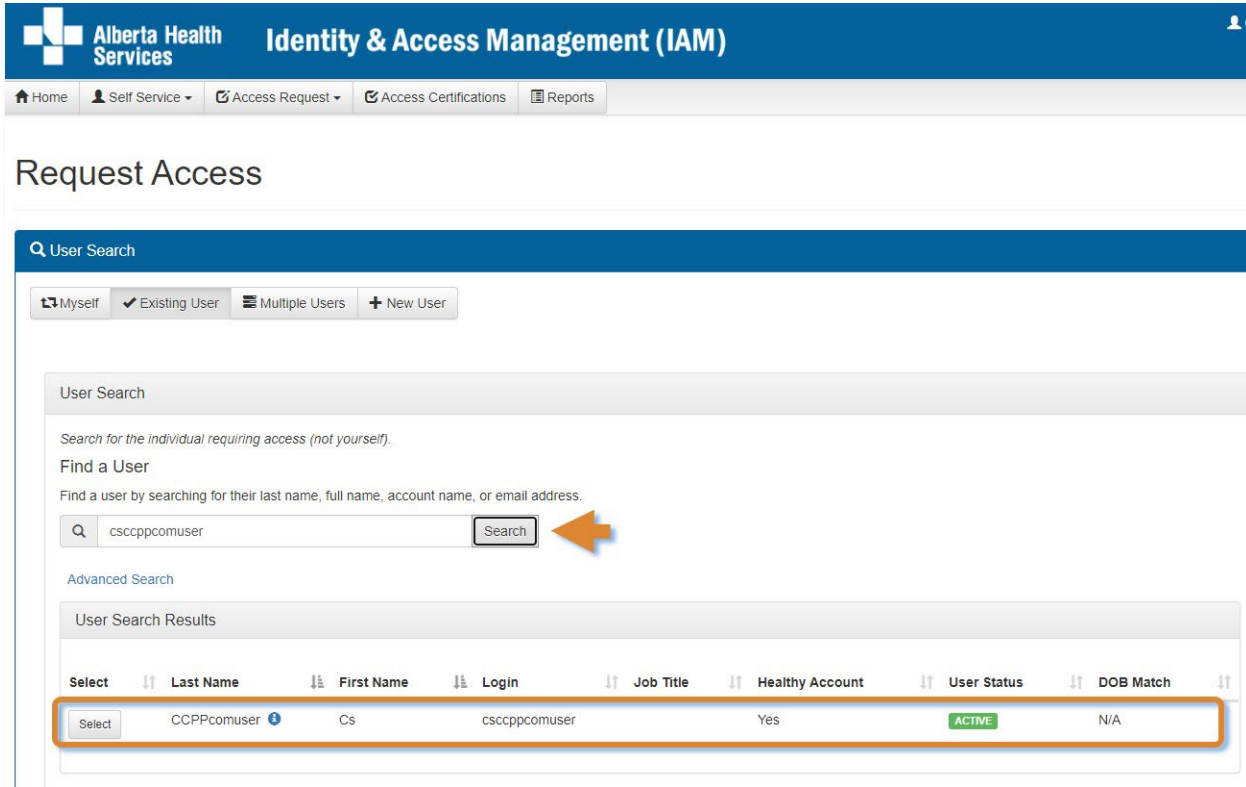
CLICK ➡ [Log in](#)

The **AHS IAM** 🏠 **Home** screen appears

CLICK [Request](#) or [Modify Access](#)

The **Request Access** screen appears with ✓ [Existing User](#) selected

SEARCH for the existing end-user using the simple or [Advanced Search](#) functions  
[User Search Results](#) appear



**Request Access**

**User Search**

Myself Existing User Multiple Users New User

User Search

Search for the individual requiring access (not yourself).

**Find a User**

Find a user by searching for their last name, full name, account name, or email address.

Q cscppcomuser Search

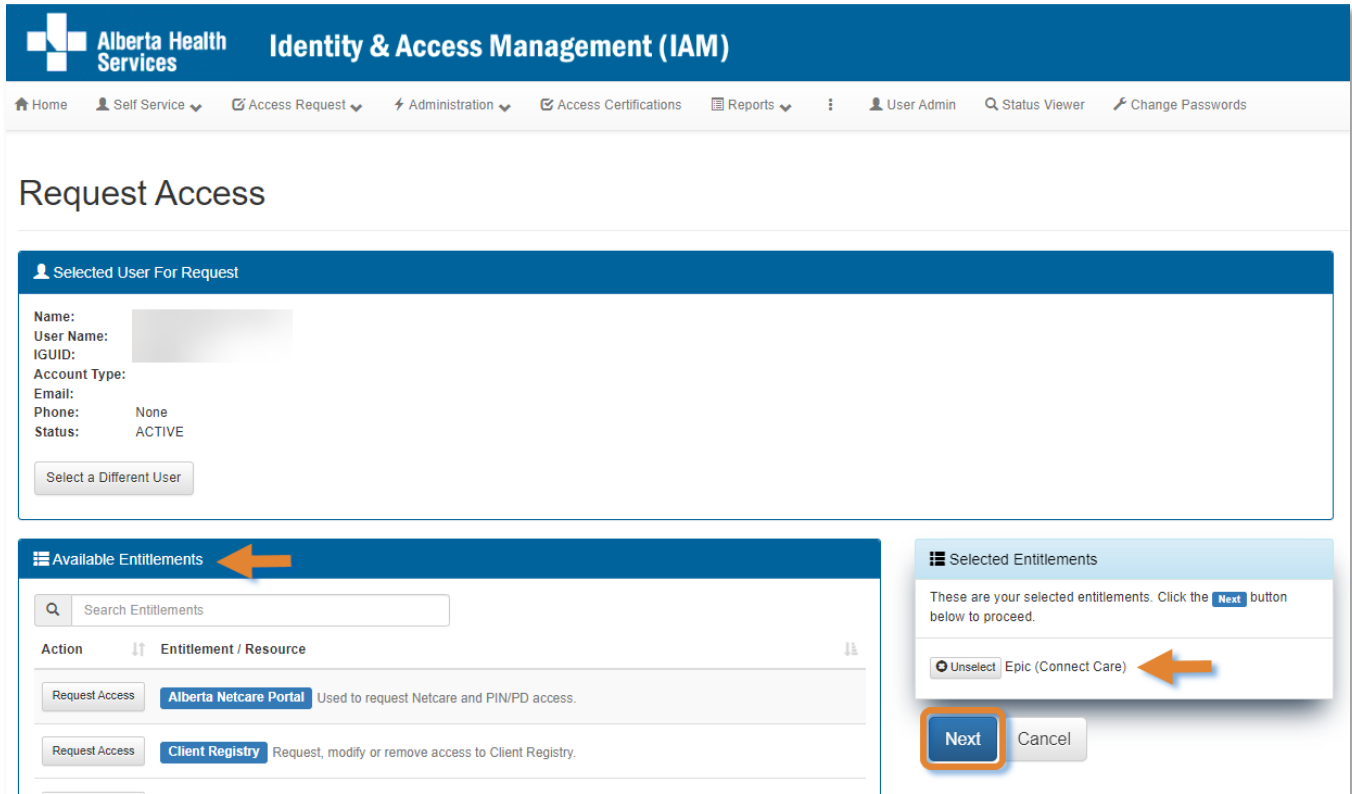
**Advanced Search**

**User Search Results**

Select	Last Name	First Name	Login	Job Title	Healthy Account	User Status	DOB Match
Select	CCPPcomuser	Cs	cscppcomuser		Yes	ACTIVE	N/A

SELECT the end-user

The **Request Access** screen appears with the end-user's details displayed in the [Selected User For Request](#) pane followed by a list of Available Entitlements



**Request Access**

**Selected User For Request**

Name: [Redacted]  
 User Name: [Redacted]  
 IGUID: [Redacted]  
 Account Type: [Redacted]  
 Email: [Redacted]  
 Phone: None  
 Status: ACTIVE

Select a Different User

**Available Entitlements**

Search Entitlements

Action	Entitlement / Resource
Request Access	<b>Alberta Netcare Portal</b> Used to request Netcare and PIN/PD access.
Request Access	<b>Client Registry</b> Request, modify or remove access to Client Registry.

**Selected Entitlements**

These are your selected entitlements. Click the **Next** button below to proceed.

☐ Unselect **Epic (Connect Care)**

**Next** Cancel

Under **Available Entitlements**, at **Epic (Connect Care)**, CLICK **Request Access**

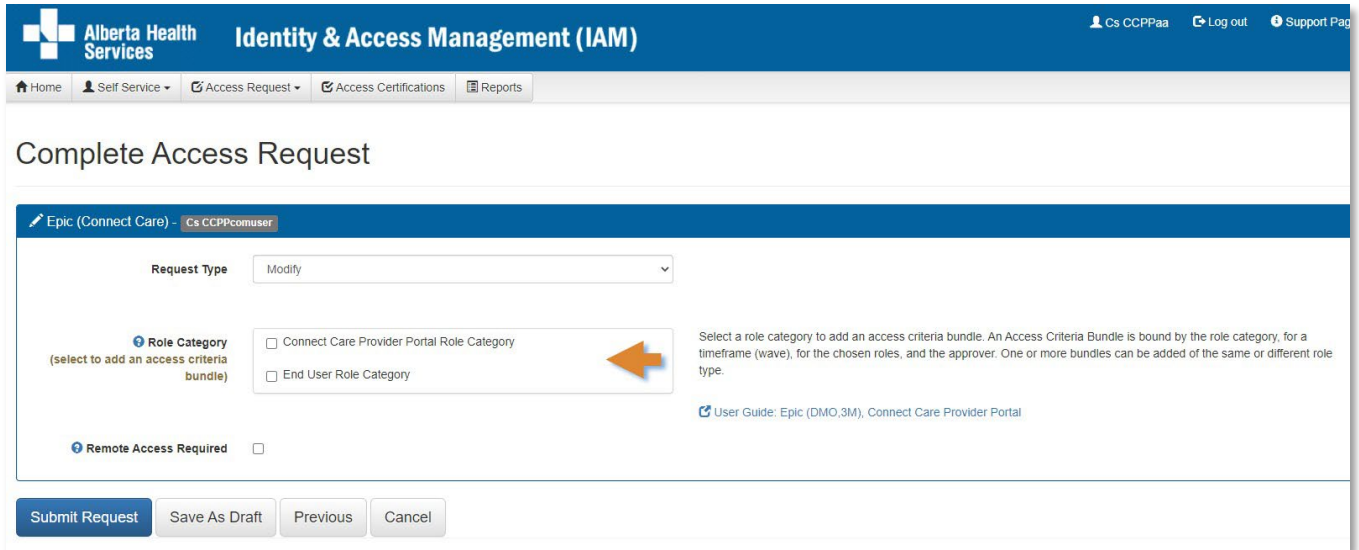
**i** If the button says **Change Access**, the end-user already had Epic (Connect Care) access from another launch. You can modify their current access OR request access for a different Launch.

The screen refreshes and the **Selected Entitlements** pane appears with **Epic (Connect Care)** displayed.

CLICK **Next**

The **Complete Access Request** screen appears

If there are pending requests for the end-user, that information will be displayed. Go ahead with a new request but do not duplicate a pending request.



**Complete Access Request**

Epic (Connect Care) - Cs CCPPcomuser

Request Type: Modify

**Role Category**  
(select to add an access criteria bundle)

☐ Connect Care Provider Portal Role Category

☐ End User Role Category

Select a role category to add an access criteria bundle. An Access Criteria Bundle is bound by the role category, for a timeframe (wave), for the chosen roles, and the approver. One or more bundles can be added of the same or different role type.

[User Guide: Epic \(DMO,3M\), Connect Care Provider Portal](#)

☐ Remote Access Required

Submit Request Save As Draft Previous Cancel

SELECT [Connect Care Provider Portal Role Category](#)

The screen refreshes to display a [CMIO Role Category – Access Criteria Bundle](#)

You can submit more than one access bundle at a time. CLICK the [Connect Care Provider Portal Role Category](#) as many times as needed.

SELECT [Facilities](#)

SELECT the [Launch](#)

The pane will refresh to include launch specific details

ACCEPT or CHANGE the [Account Expiry Date](#)

ENTER [Position Designation](#)

ENTER [College License ID](#) as needed

SELECT [Connect Care Provider Portal Roles](#)

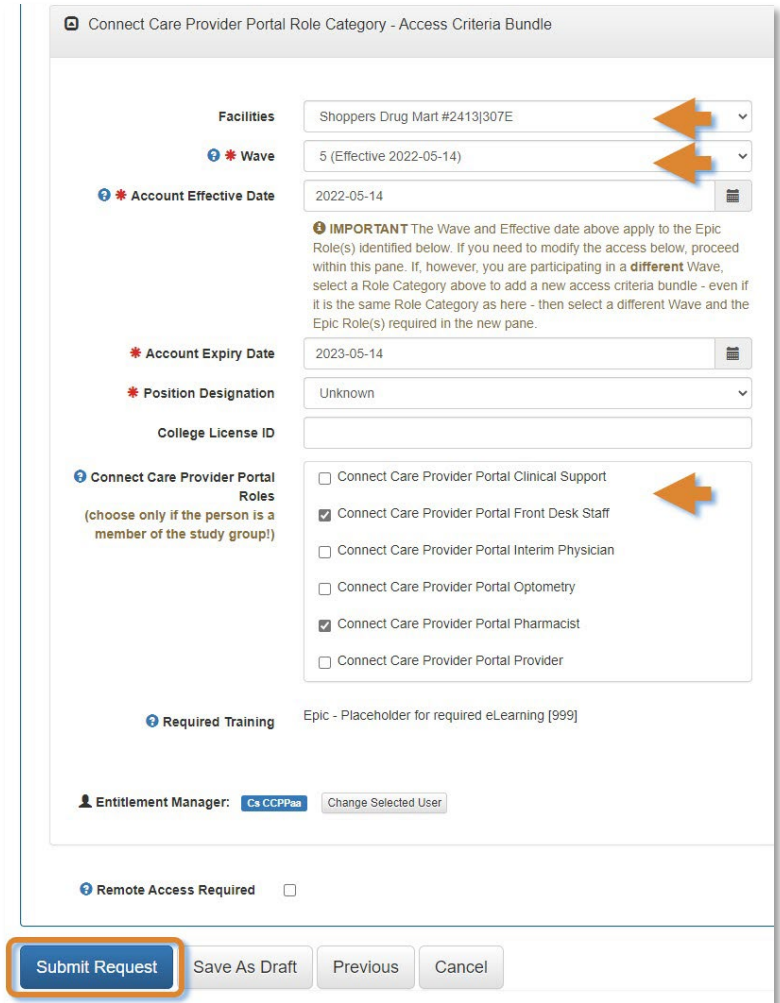
[Required Training](#) will display for its corresponding CCPP role

ACCEPT or CHANGE the [Entitlement Manager](#) if displayed

OR

SEARCH for and SELECT an [Entitlement Manager / Authorized Approver](#) if one is not displayed

Role Login Types are only displayed for Epic (Connect Care) roles that may need access to the Executive Web Dashboard, Haiku/Canto, Rover, and Willow Ambulatory.



If [Role Type Selections](#) are displayed SELECT the [Login Type Roles](#) required.

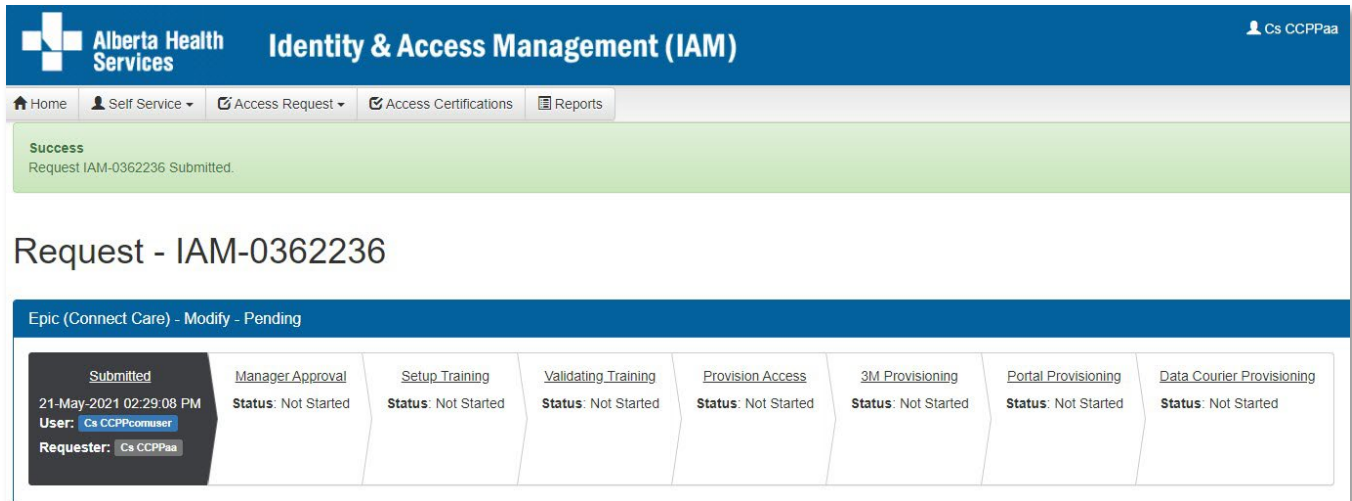
[Role Login Types](#) are only displayed for Epic (Connect Care) roles that may need access to the Executive Web Dashboard, Haiku/Canto, Rover, and Willow Ambulatory.

Consult the [Login Type Guide](#) for more information if needed. You'll see it is also linked right in the form.

SELECT [Remote Access Required](#) even if the end-user already has an AHS RSA SecurID Token. Click to read more in the [Remote access \(RUNA\) with RSA SecurID tokens Fact Sheet](#).

CLICK [Submit Request](#)

The **Request Status** screen will appear



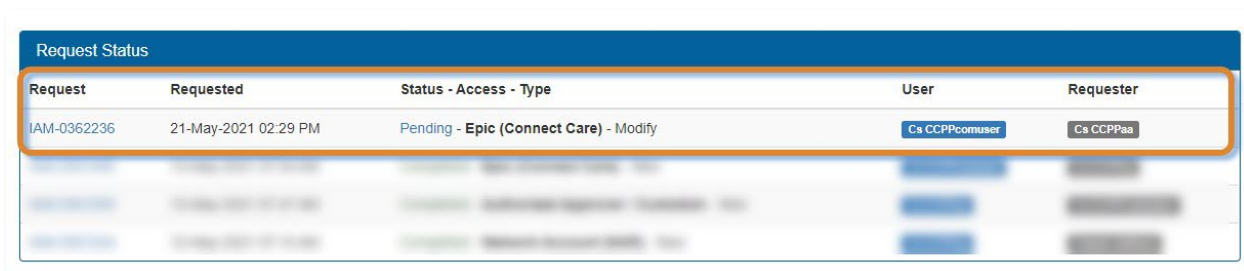
NOTICE the on-screen message, “[Success Request IAM-##### Submitted.](#)”, shaded in green, is displayed in the top left corner of the screen.

The request steps and their statuses display. As each step is satisfied, the statuses will automatically update. Those that do not apply will be automatically skipped.

CLICK [Home](#)

The **AHS IAM Home** screen appears

TRACK the progress of the request under [Request Status](#)

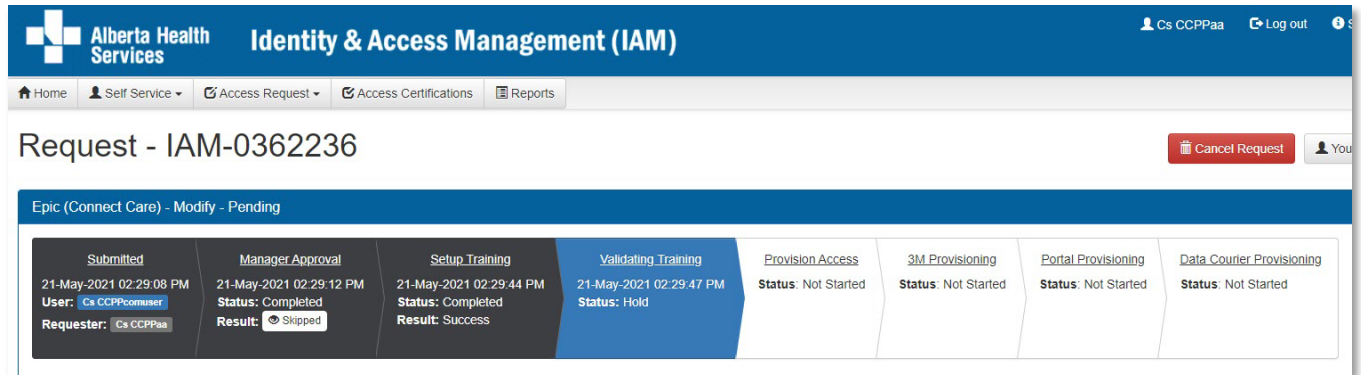


Request	Requested	Status - Access - Type	User	Requester
IAM-0362236	21-May-2021 02:29 PM	Pending - Epic (Connect Care) - Modify	Cs CCPcomuser	Cs CCPaa

You can monitor the progress of this request on the **AHS IAM Home** screen. In the [Request Status](#) pane, you will see the request and its statuses listed.



CLICK on the [Request](#) number for more details.



The screenshot shows the AHS IAM interface. At the top, there's a blue header with the Alberta Health Services logo and the text "Identity & Access Management (IAM)". Below the header, there's a navigation bar with links: Home, Self Service, Access Request, Access Certifications, and Reports. The main content area displays a request titled "Request - IAM-0362236" with a "Cancel Request" button and a user profile icon. Below this, there's a section for "Epic (Connect Care) - Modify - Pending" which contains a table of request steps.

Submitted	Manager Approval	Setup Training	Validating Training	Provision Access	3M Provisioning	Portal Provisioning	Data Courier Provisioning
21-May-2021 02:29:08 PM User: <a href="#">Cs CCPPauser</a> Requester: <a href="#">Cs CCPPa</a>	21-May-2021 02:29:12 PM Status: Completed Result: <a href="#">Skipped</a>	21-May-2021 02:29:44 PM Status: Completed Result: Success	21-May-2021 02:29:47 PM Status: Hold	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started


As the Requester you will also be sent email notifications from Identity Management as the request progresses through to completion.

CLICK [Home](#)

The **AHS IAM** [Home](#) screen appears

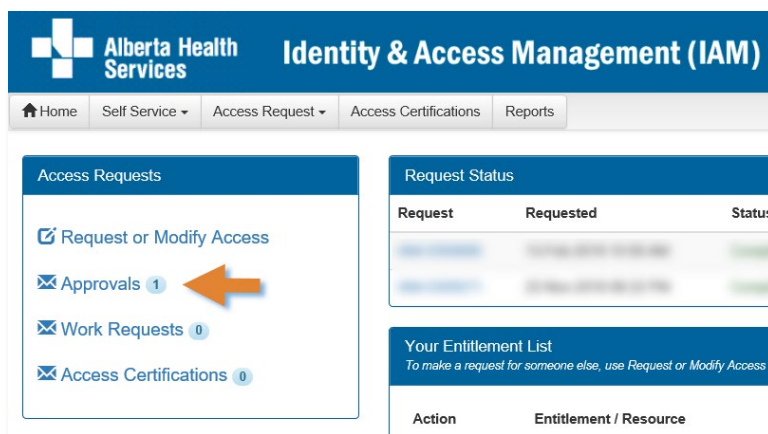
Complete 

## Approve the NAR portion of an Epic (Connect Care) access request

 If you received an email from Identity Management that a **Epic (Connect Care)** access request requires your approval, perform the following steps.

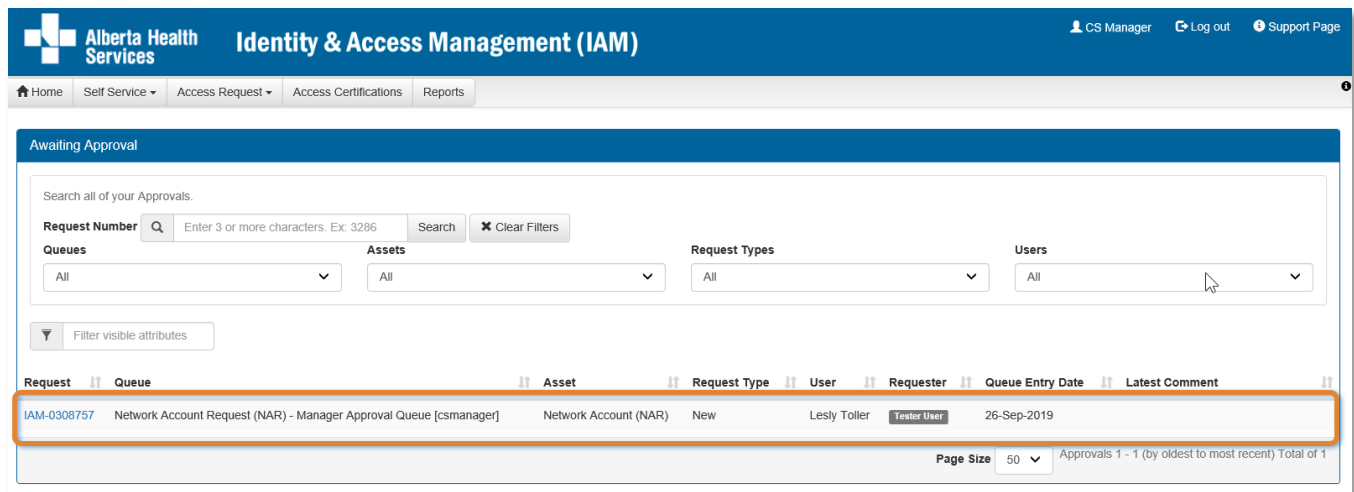
ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
LOGIN

In the **Access Requests** pane, notice a new **Approval** item is waiting



CLICK **Approvals**

The **Awaiting Approval** screen will appear



CLICK the **Request** number


The **Request Status** screen displays showing the **Network Account (NAR)** request for review and approval.

CLICK [View all Entitlements on Request](#) to see all entitlements that are included in this request: [NAR](#), [RUNA](#) and [Epic \(Connect Care\)](#).

REVIEW the  [Network Account \(NAR\)](#) request information

## Tool Tips for approving a NAR request

### At Your Comments


Comments you enter can only be seen by other approvers during the request. Comments cannot be seen by the user or [Requester](#). If you see this comment icon  on a work item, it means an [Authorized Approver](#) has left a comment.

### At Approve, Deny, Save



#### [Approve](#)

This approves the request and closes the screen. The **Request Status screen** will appear showing the request as [Complete](#). The message, “[Success – Work Item Processed.](#)” will appear in the top left corner shaded in green. There will be one less item in your [Approval](#) queue. An automated email will be sent from Identity Management to the Requester informing them the request was approved.

**✕ Deny** – will deny the request and require a reason to be entered in the verification pane. The **Awaiting Approval** screen will appear and the denied request no longer listed. At the **AHS IAM**  **Home** screen, there will be one less item in your [Approval](#) queue. An automated email will be sent from Identity Management to the Requester informing them the request was denied.

[Save](#) – will save your changes and leave the screen open. You can leave the approval screen without losing your change. You can re-open the request for review at another time. Requests for Approval will remain in your queue for 10 business days before they time-out and are automatically denied and closed.

CHANGE information as needed and permitted

ENTER [Comments](#) as needed

CLICK [Approve](#)


Note the on-screen message, “[Success Work Item Processed.](#)” shaded in green in the top left corner.

CLICK  [Home](#)

The **AHS IAM**  **Home** screen appears


In the [Access Requests](#) pane, you will see one less item in the [Approvals](#) queue.

Your role as the NAR Authorized Approver is complete.

 The Requester will be notified by email that the end-user's AHS Network User ID is ready for pickup. This is done so the end-user can access MyLearningLink and complete their Epic (Connect Care) training without delay.

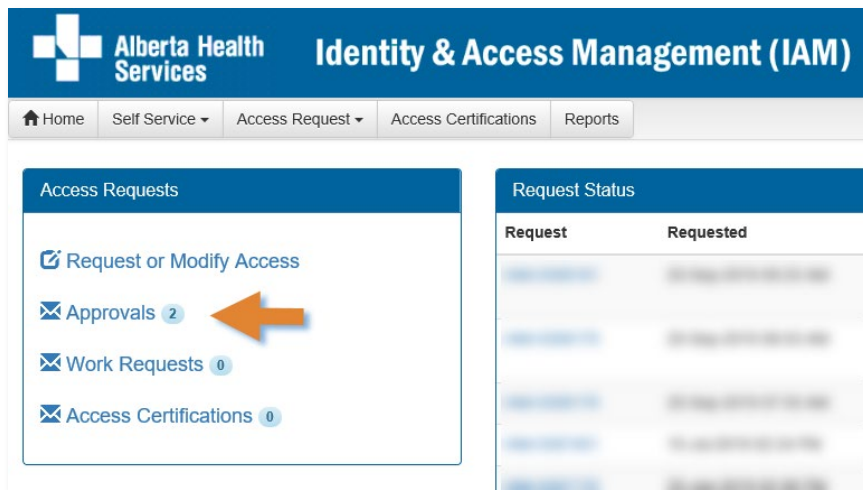
Complete 

## Approve the Epic (Connect Care) portion of an access request

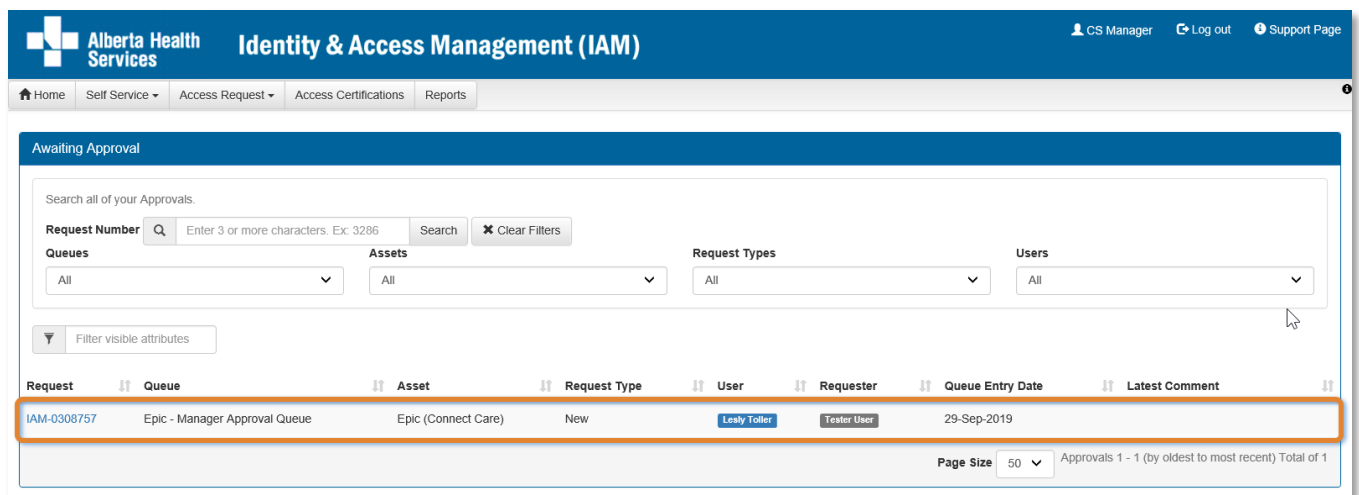
 If you received an email from Identity Management that an **Epic (Connect Care)** access request requires your approval, perform the following steps.

ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
LOGIN

In the **Access Requests** pane, notice a new work **Approval** item is waiting



CLICK Approvals  
The **Awaiting Approval** screen displays



CLICK on the [IAM-#####](#) request number

The **Pending Approval – IAM-#####** screen displays


The **Request Status screen** at the top of the screen shows the progress of [Epic \(Connect Care\)](#) request – waiting for [Manager Approval](#). Complete details of the [Epic \(Connect Care\)](#) request follow.

CLICK [View all Entitlements on Request](#) to see all entitlements that are included in this request: [NAR](#), [Epic \(Connect Care\)](#) and [RUNA](#).

REVIEW the  [Epic \(Connect Care\)](#) request information

## Tool Tips for approving an Epic (Connect Care) request

### At Your Comments


Comments you enter can only be seen by other approvers during the request. Comments cannot be seen by the user or [Requester](#). If you see this comment icon  on a work item, it means an [Authorized Approver](#) has left a comment.

### At Approve, Deny, Save



#### [Approve](#)

This approves the request and closes the screen. The **Request Status screen** will appear showing the request as [Complete](#). The message, “[Success – Work Item Processed.](#)” will appear in the top left corner shaded in green. There will be one less item in your [Approval](#) queue. An automated email will be sent from Identity Management to the Requester informing them the request was approved.

**✖ Deny** – will deny the request and require a reason to be entered in the verification pane. The **Awaiting Approval** screen will appear and the denied request no longer listed. At the **AHS IAM**  **Home** screen, there will be one less item in your [Approval](#) queue. An automated email will be sent from Identity Management to the Requester informing them the request was denied.

**Save** – will save your changes and leave the screen open. You can leave the approval screen without losing your change. You can re-open the request for review at another time. Requests for Approval will remain in your queue for 10 business days before they time-out and are automatically denied and closed.

REVIEW the request

CHANGE information as needed and permitted

ENTER [Comments](#) as needed

CLICK [Approve](#)


Note the on-screen message, “**Success** Work Item Processed.” shaded in green in the top left corner.

CLICK  [Home](#)

The **AHS IAM**  **Home** screen appears

In the [Access Requests](#) pane, you will see one less item in the [Approvals](#) queue.


Your role as the [Epic Authorized Approver](#) is complete.

 Once the end-user has completed their [Epic \(Connect Care\)](#) training, access will be provisioned for the end-user. The end-user can access [Epic \(Connect Care\)](#).

Complete 



## Pick up access credentials

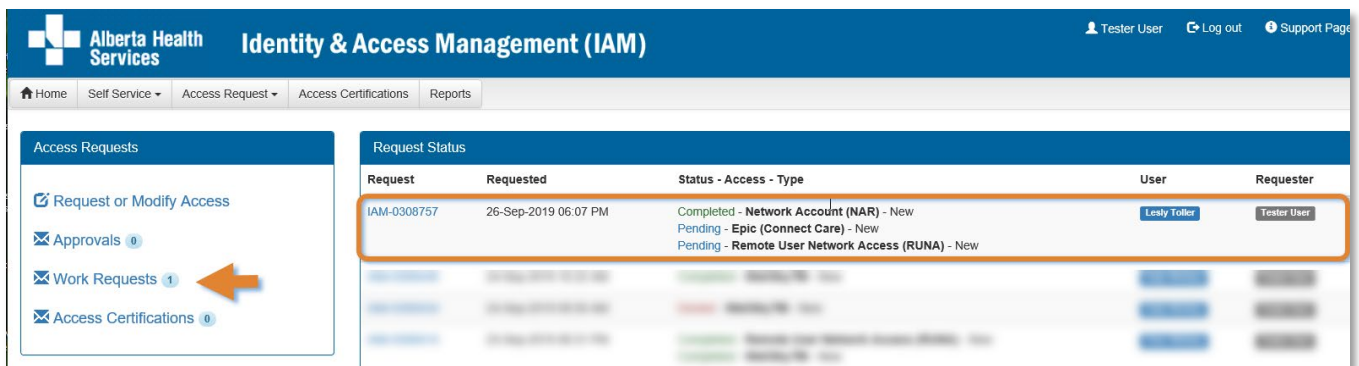
 If you have been identified as the person to pick up an end-user's access credentials:

If you have an internal AHS Email address, the end-user's credentials will be sent to you.

If you do not have an internal AHS email address, you will receive an email telling you to log into AHS IAM to pick up the end-user's credentials.

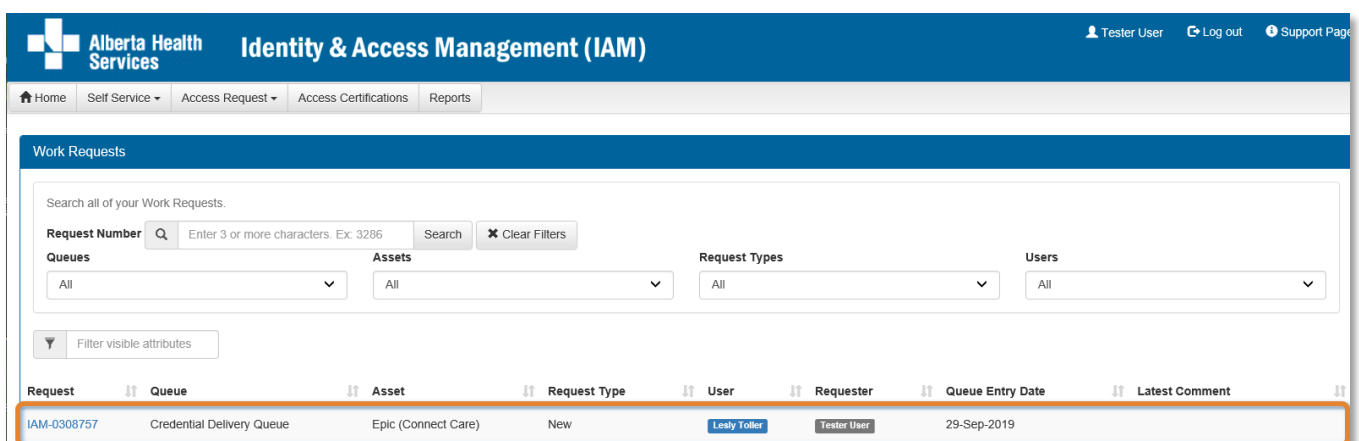
ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
LOGIN

In the **Access Requests** pane, notice a new **Work Request** item is waiting for you.



Request	Requested	Status - Access - Type	User	Requester
IAM-0308757	26-Sep-2019 06:07 PM	Completed - Network Account (NAR) - New Pending - Epic (Connect Care) - New Pending - Remote User Network Access (RUNA) - New	Lesly Toller	Tester User

CLICK on **Work Requests**  
The **Work Requests** screen displays



Request	Queue	Asset	Request Type	User	Requester	Queue Entry Date	Latest Comment
IAM-0308757	Credential Delivery Queue	Epic (Connect Care)	New	Lesly Toller	Tester User	29-Sep-2019	

CLICK on the request number **IAM-#####**

The **Pending Manual Action – IAM-#####** screen displays

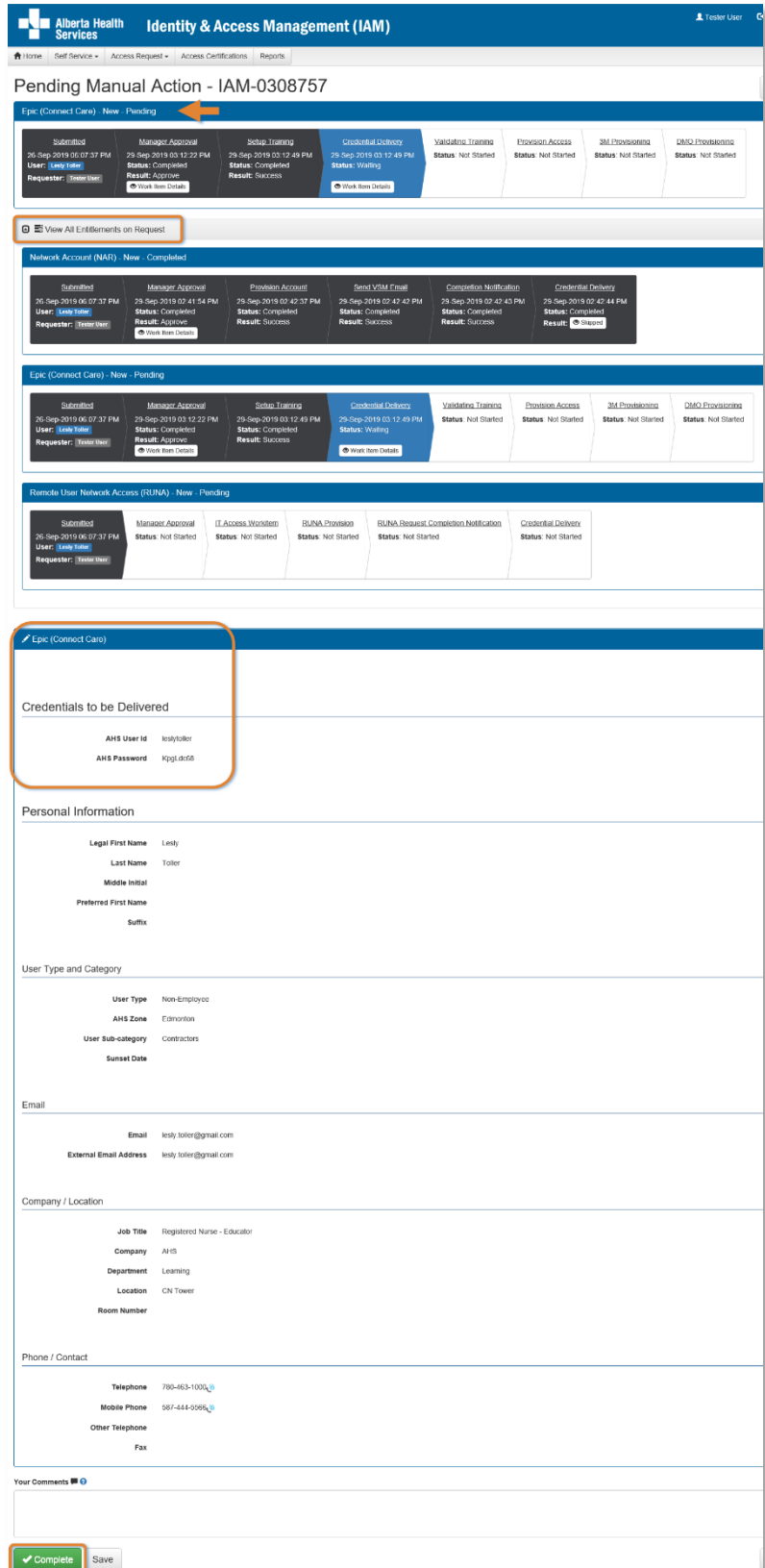
The **Request Status** screen at the top of the screen shows the progress of Epic (Connect Care) request – waiting for Credential Delivery.

CLICK [View all Entitlements on Request](#) to see all entitlements that are included in this request: **NAR**, **Epic (Connect Care)** and **RUNA**.

WRITE DOWN the access credentials before CLICKING Complete

❗ Once the Work Request is marked complete, the screen will disappear and you will not be able to access these credentials again. If that happens, contact the [AHS IT Service Desk](#) and request an “AHS Network password reset for a new end-user’s network ID”.

You can CLICK [Save](#) and the Work Request will be saved but the provisioning will not proceed. You must [Complete](#) the Work Request for the request provisioning to continue.



**Alberta Health Services Identity & Access Management (IAM)**

Home Self Service Access Request Access Certifications Reports

**Pending Manual Action - IAM-0308757**

Epic (Connect Care) New Pending

Submitted	Manager Approval	Setup Training	Credential Delivery	Validation Training	Provision Access	3rd Provisioning	DMO Provisioning
26-Sep-2019 06:07:37 PM User: <a href="#">Lesly Toler</a> Requester: <a href="#">Lesly Toler</a>	29-Sep-2019 03:12:22 PM Status: Completed Result: Approved <a href="#">Work Item Details</a>	29-Sep-2019 03:12:49 PM Status: Completed Result: Success	29-Sep-2019 03:12:49 PM Status: Waiting <a href="#">Work Item Details</a>	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started

[View All Entitlements on Request](#)

**Network Account (NAR) New Completed**

Submitted	Manager Approval	Provision Account	Send VM Email	Completion Notification	Credential Delivery
26-Sep-2019 06:07:37 PM User: <a href="#">Lesly Toler</a> Requester: <a href="#">Lesly Toler</a>	29-Sep-2019 03:12:22 PM Status: Completed Result: Approved <a href="#">Work Item Details</a>	29-Sep-2019 03:12:49 PM Status: Completed Result: Success	29-Sep-2019 03:12:49 PM Status: Completed Result: Success	29-Sep-2019 03:12:49 PM Status: Completed Result: Success	29-Sep-2019 03:12:49 PM Status: Completed Result: Success

**Epic (Connect Care) New Pending**

Submitted	Manager Approval	Setup Training	Credential Delivery	Validation Training	Provision Access	3rd Provisioning	DMO Provisioning
26-Sep-2019 06:07:37 PM User: <a href="#">Lesly Toler</a> Requester: <a href="#">Lesly Toler</a>	29-Sep-2019 03:12:22 PM Status: Completed Result: Approved <a href="#">Work Item Details</a>	29-Sep-2019 03:12:49 PM Status: Completed Result: Success	29-Sep-2019 03:12:49 PM Status: Waiting <a href="#">Work Item Details</a>	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started

**Remote User Network Access (RUNA) New Pending**

Submitted	Manager Approval	IT Access Workitem	RUNA Provision	RUNA Request Completion Notification	Credential Delivery
26-Sep-2019 06:07:37 PM User: <a href="#">Lesly Toler</a> Requester: <a href="#">Lesly Toler</a>	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started

**Epic (Connect Care)**

**Credentials to be Delivered**

AHS User ID: leslytoler  
AHS Password: Kpgj.d058

**Personal Information**

Legal First Name: Lesly  
Last Name: Toler  
Middle Initial:  
Preferred First Name:  
Suffix:

**User Type and Category**

User Type: Non-Employee  
AHS Zone: Edmonton  
User Sub-category: Contractors  
Sunset Date:

**Email**

Email: lesly.toler@gmail.com  
External Email Address: lesly.toler@gmail.com

**Company / Location**

Job Title: Registered Nurse - Educator  
Company: AHS  
Department: Learning  
Location: CN Tower  
Room Number:

**Phone / Contact**

Telephone: 780-453-1004  
Mobile Phone: 587-444-5955  
Other Telephone:  
Fax:

Your Comments

[Complete](#) [Save](#)

CLICK [Complete](#)

The Work Request disappears

Note the on-screen message, “[Success Work Item Processed.](#)” shaded in green in the top left corner of the screen.

CONVEY the access credentials to the end-user

As needed, remind the end-user to complete their [Epic \(Connect Care\)](#) training in MyLearningLink.

CLICK  [Home](#)

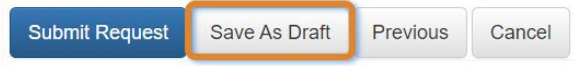
The **AHS IAM**  **Home** screen appears

There is one less item in the [Work Requests](#) queue

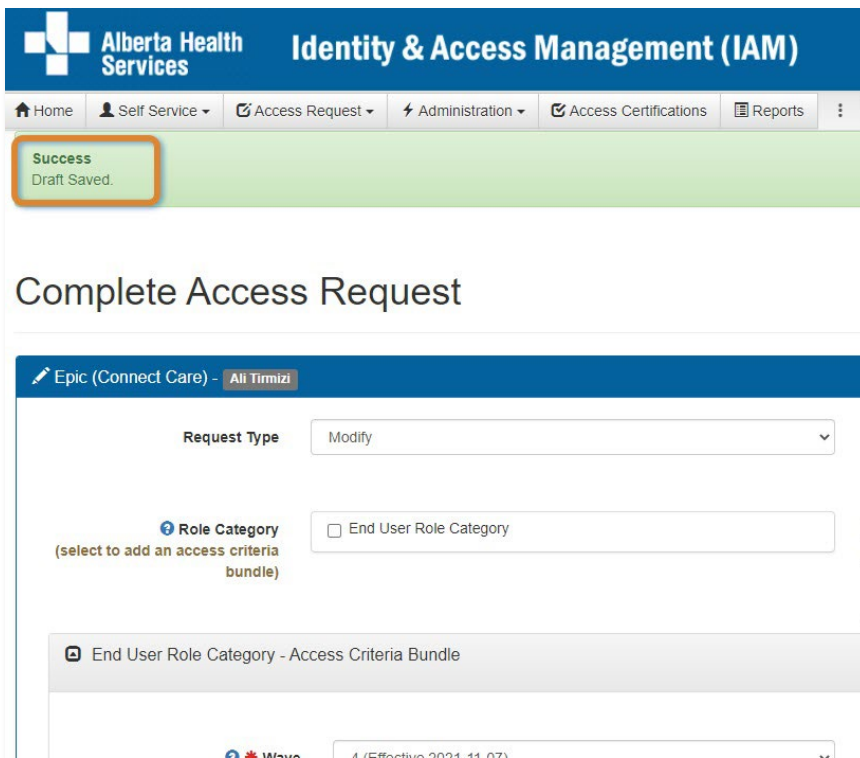
[Complete](#) 

## Save an access request as a draft

At the bottom of the **Complete Access Request** screen CLICK [Save as Draft](#)



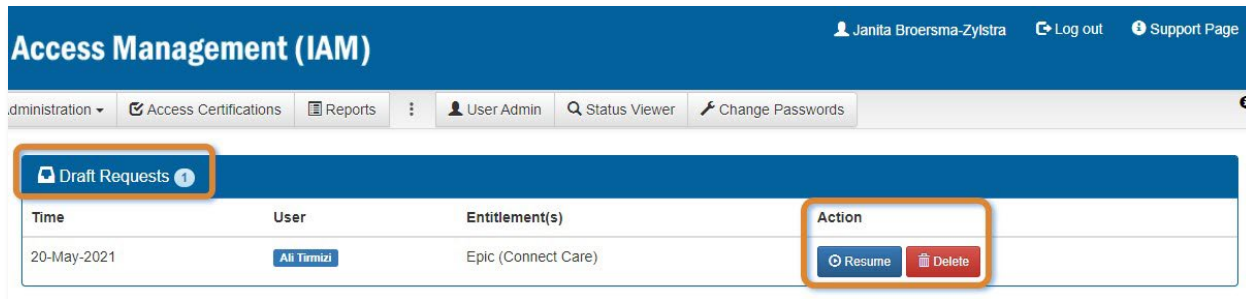
The **Complete Access Request** screen refreshes with message, “[Success Draft Saved](#)” shaded in green in the top left corner. If you scroll down you will see all entered information saved.



## Manage a saved draft access request

At the AHS IAM [Home](#) screen

In the [Draft Requests](#) pane the saved draft is listed



CLICK [Delete](#) to permanently delete the request

OR

CLICK [Resume](#) to continue with the request. You can save a request as a draft as often as needed.  
The **Complete Access Request** screen displays

ACCEPT or MODIFY the request fields as needed

CLICK [Submit Request](#)

The **Request Status** screen displays

The on-screen message, “[Success Request IAM-##### Submitted.](#)”, shaded in green, is displayed in the top left corner of the screen.

CLICK [Home](#)

The **AHS IAM Home** screen appears

TRACK the progress of the request under [Request Status](#)


You can monitor the progress of this request on the **AHS IAM Home** screen. In the [Request Status](#) pane, you will see the request and its statuses listed. CLICK on the [Request](#) number for more details. As the Requester you will also be sent an email notification from Identity Management as the request progresses through to completion.

CLICK [Home](#)

The **AHS IAM Home** screen appears

Complete 

## Modify existing Epic (Connect Care) access

 **BEFORE** proceeding, **CONFIRM** the end-user's access needs before removing any or all access to Epic (Connect Care).

ENTER the AHS IAM URL into your internet browser  <https://iam.albertahealthservices.ca>

LOGIN

The **AHS IAM**  **Home** screen appears

CLICK [Request or Modify Access](#)

The **Request Access** screen appears with  [Existing User](#) checked

SEARCH for the existing end-user using the simple or Advanced Search functions  
[User Search Results](#) appear

SELECT the end-user

The **Request Access** screen appears with the end-user's details displayed

Under [Available Entitlements](#), LOCATE [Epic \(Connect Care\)](#) and CLICK [Change Access](#)

The [Selected Entitlements](#) pane appears with [Epic \(Connect Care\)](#) selected

CLICK [Next](#)

The **Complete Access Request** screen appears with the end-user's details and current access displayed.

ACCEPT or MODIFY the [Entitlement Manager](#) / Authorized Approver

CLICK [Submit Request](#)

The Request Status screen appears

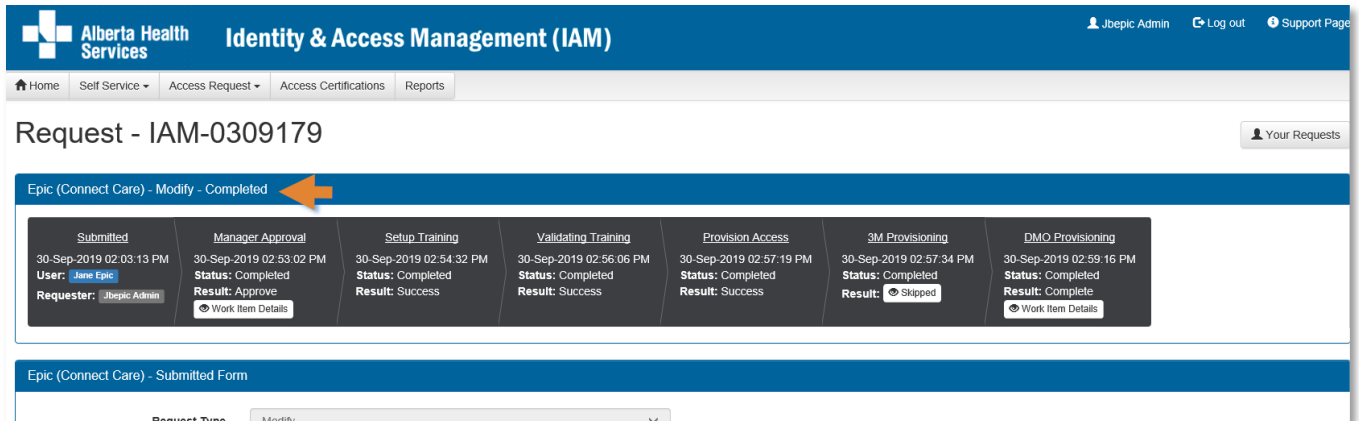
REVIEW the [Epic \(Connect Care\) – Submitted Form](#) pane to review the modifications.

The modified content is highlighted with both a  [Modified](#) label and an  exclamation mark.

The **Request Status screen** will appear and you will see the workflow steps complete up to [Manager Approval](#), which will have a status of [Waiting](#).

The [Entitlement Manager](#) / Authorized Approver you identified will be sent an email from Identity Management telling them their approval is required. Once it is completed, the Dragon Medical One Provisioning Administrator will be sent an email from Identity Management telling them a work item requires their attention. Once it is completed, and the end-user has completed their training, the rest of the process will automatically complete and the end-user's [Epic \(Connect Care\)](#) access will be modified.

In time, this is what the completed request will look like.



The screenshot shows the AHS IAM interface. The top navigation bar includes the AHS logo, the title "Identity & Access Management (IAM)", and user information for "Jbepic Admin" with links for "Log out" and "Support Page". Below the navigation bar, there are tabs for "Home", "Self Service", "Access Request", "Access Certifications", and "Reports". The main content area displays "Request - IAM-0309179" with a "Your Requests" button. A blue banner indicates the request status: "Epic (Connect Care) - Modify - Completed", with an orange arrow pointing to the "Completed" status. Below this, a table shows the request progress across seven stages:

Submitted	Manager Approval	Setup Training	Validating Training	Provision Access	3M Provisioning	DMO Provisioning
30-Sep-2019 02:03:13 PM User: <a href="#">Jane Epic</a> Requester: <a href="#">Jbepic Admin</a>	30-Sep-2019 02:53:02 PM Status: Completed Result: Approve <a href="#">Work Item Details</a>	30-Sep-2019 02:54:32 PM Status: Completed Result: Success	30-Sep-2019 02:56:06 PM Status: Completed Result: Success	30-Sep-2019 02:57:19 PM Status: Completed Result: Success	30-Sep-2019 02:57:34 PM Status: Completed Result: Skipped	30-Sep-2019 02:59:16 PM Status: Completed Result: Complete <a href="#">Work Item Details</a>

Below the table, a blue banner indicates the request type: "Epic (Connect Care) - Submitted Form".

CLICK  [Home](#)

The **AHS IAM**  **Home** screen appears

Complete 



## Modify Login Types only

**!** BEFORE proceeding, CONFIRM the end-user's access needs before modifying any access to Epic (Connect Care).

ENTER the AHS IAM URL into your internet browser ➡ <https://iam.albertahealthservices.ca>  
LOGIN

The **AHS IAM**  **Home** screen appears

CLICK [Request or Modify Access](#)

The **Request Access** screen appears with ☒ [Existing User](#) checked

SEARCH for the existing end-user using the simple or Advanced Search functions  
[User Search Results](#) appear

SELECT the end-user

The **Request Access** screen appears with the end-user's details displayed

Under [Available Entitlements](#), LOCATE [Epic \(Connect Care\)](#) and CLICK [Change Access](#)

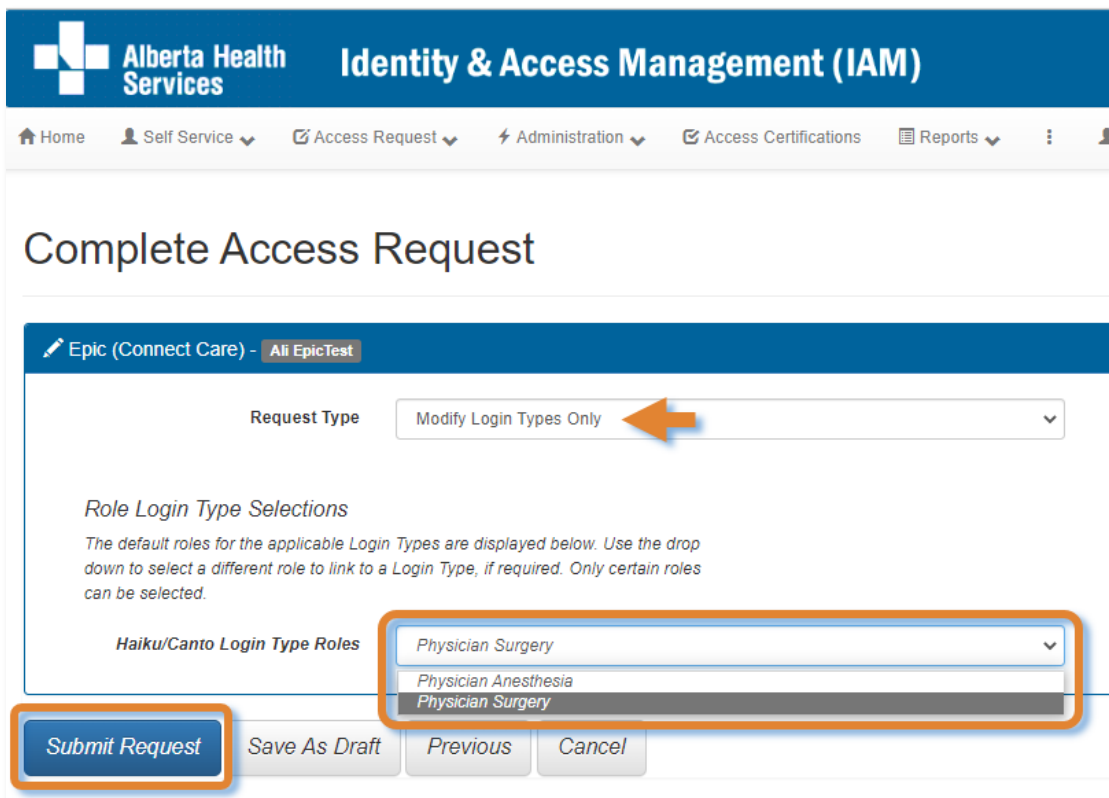
The [Selected Entitlements](#) pane appears with [Epic \(Connect Care\)](#) selected

CLICK [Next](#)

The **Complete Access Request** screen appears with the end-user's details and current access displayed.

At [Request Type](#) SELECT [Modify Login Types Only](#)

The screen refreshes to display the [Role Login Types Selections](#) pane



**Alberta Health Services Identity & Access Management (IAM)**

Home Self Service Access Request Administration Access Certifications Reports

### Complete Access Request

Epic (Connect Care) - Ali EpicTest

**Request Type** Modify Login Types Only

**Role Login Type Selections**

The default roles for the applicable Login Types are displayed below. Use the drop down to select a different role to link to a Login Type, if required. Only certain roles can be selected.

**Haiku/Canto Login Type Roles**

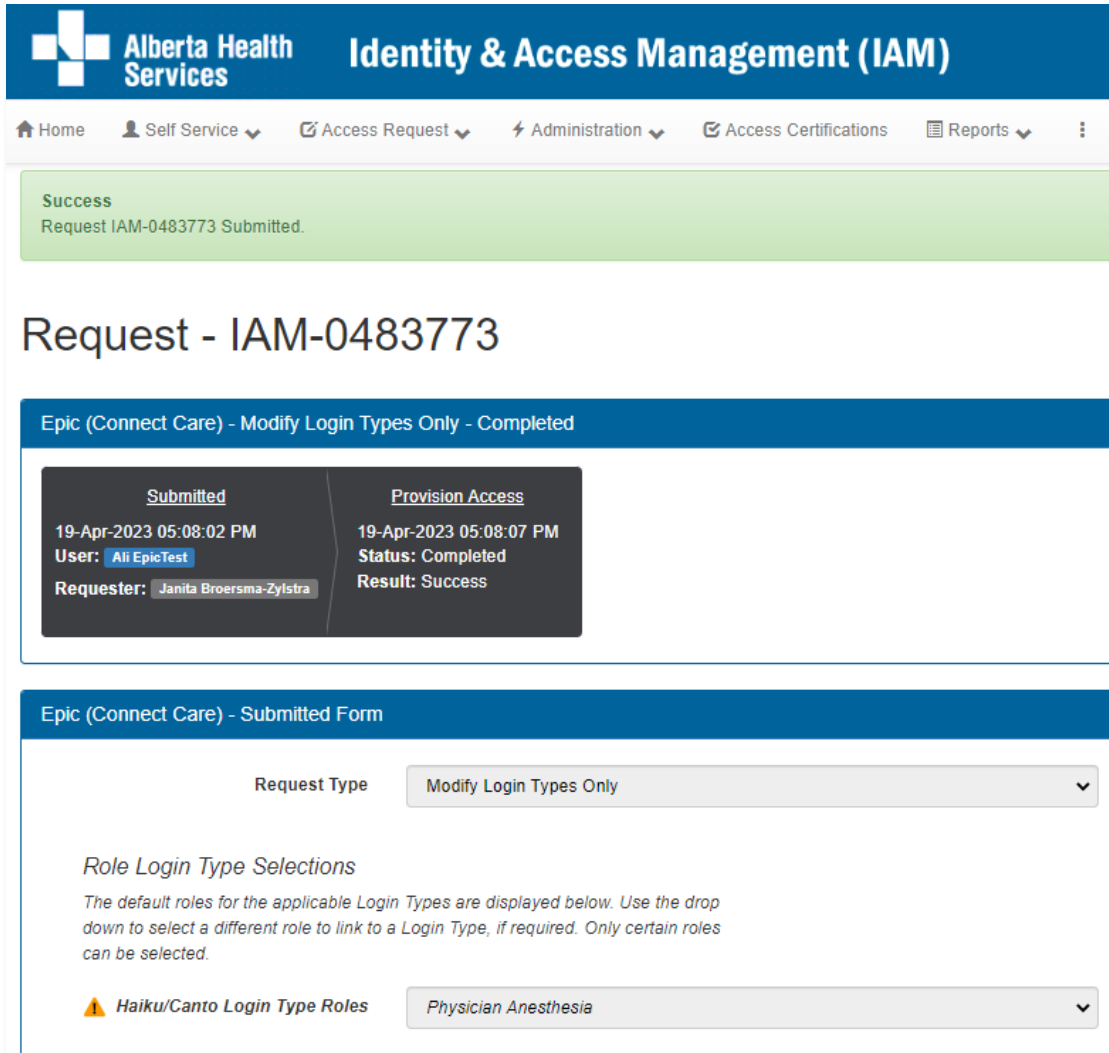
- Physician Surgery
- Physician Anesthesia
- Physician Surgery


**Submit Request** Save As Draft Previous Cancel

SELECT the [Login Type Role](#) desired

CLICK [Submit Request](#)

The **Request Status** screen appears showing the tasks as [Completed](#).




**Alberta Health  
Services**

## Identity & Access Management (IAM)

[Home](#)
[Self Service](#)
[Access Request](#)
[Administration](#)
[Access Certifications](#)
[Reports](#)

**Success**  
 Request IAM-0483773 Submitted.

### Request - IAM-0483773

**Epic (Connect Care) - Modify Login Types Only - Completed**


Submitted	Provision Access
19-Apr-2023 05:08:02 PM User: <a href="#">Ali EpicTest</a> Requester: <a href="#">Janita Broersma-Zylstra</a>	19-Apr-2023 05:08:07 PM Status: Completed Result: Success

**Epic (Connect Care) - Submitted Form**

Request Type: [Modify Login Types Only](#)


*Role Login Type Selections*

The default roles for the applicable Login Types are displayed below. Use the drop down to select a different role to link to a Login Type, if required. Only certain roles can be selected.

 **Haiku/Canto Login Type Roles**

[Physician Anesthesia](#)

REVIEW the [Epic \(Connect Care\) – Submitted Form](#) pane to review the modifications.

CLICK on the exclamation mark  symbol  
A pop-up displays showing the revisions  
made

CLICK  [Home](#)  
The **AHS IAM**  **Home** screen appears

Haiku/Canto Login Type Roles	
Original Value	No Value
Updated Value	Physician Anesthesia
Close	

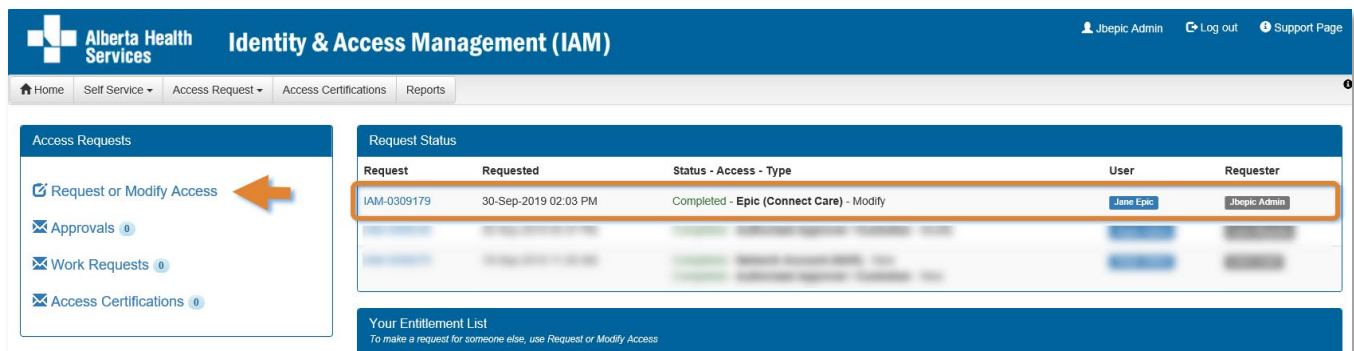
Complete 

## Remove existing Epic (Connect Care) access

**!** BEFORE proceeding, CONFIRM the end-user's access needs before removing any or all access to Epic (Connect Care).

ENTER the AHS IAM URL into your internet browser ➡ <https://iam.albertahealthservices.ca>  
LOGIN

The **AHS IAM** 🏠 **Home** screen appears



CLICK [Request or Modify Access](#)

The **Request Access** screen appears with ☒ [Existing User](#) checked

SEARCH for the existing end-user using the simple or Advanced Search functions  
[User Search Results](#) appear

SELECT the end-user

The **Request Access** screen appears with the end-user's details displayed

Under [Available Entitlements](#), LOCATE [Epic \(Connect Care\)](#) and CLICK [Change Access](#)  
The [Selected Entitlements](#) pane appears with [Epic \(Connect Care\)](#) selected

CLICK [Next](#)

The **Complete Access Request** screen appears with the end-user's details displayed

CLICK [Remove](#) next to the [Access Criteria Bundle](#) you want removed from the end-user's [Epic \(Connect Care\)](#) access

Please note that any associated [Login Types](#) will be automatically removed, no special steps need to be taken by the Requester.

ACCEPT or CHANGE the [Entitlement Manager](#) / Authorized Approver.

CLICK [Submit Request](#)

The **Request Status screen** will appear and you will see the workflow steps complete up to [Manager Approval](#), which will have a status of [Waiting](#).

The [Entitlement Manager](#) / Authorized Approver you identified will be sent an email from Identity Management telling them their approval is required. Once it is completed, the rest of the process will automatically complete and the end-user's [Epic \(Connect Care\) Access Criteria Bundle](#) will be removed.

If the access included Dragon Medical One and / or 3M Health Information Systems, the appropriate Provisioning Administrator will be sent an email from Identity Management telling them a Work Item required their action. Once complete, the rest of the process will automatically complete and the end-user's access to those applications will be removed.


CLICK [Home](#)


The **AHS IAM Home** screen appears

In the [Request Status](#) pane, you will see the request displayed with a status of [Completed](#).

Complete 

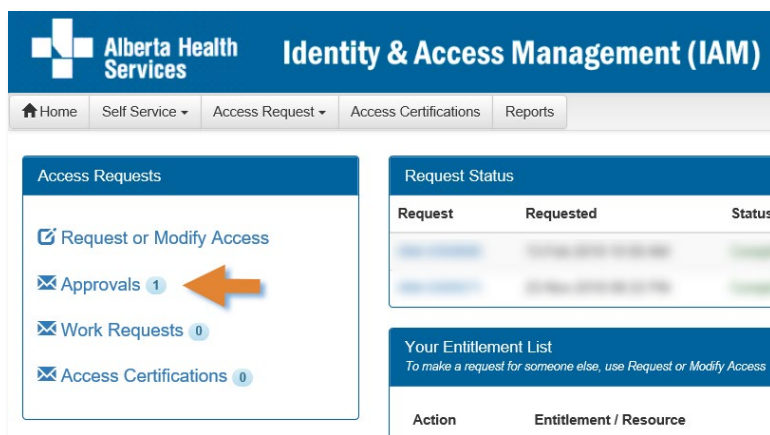
## Approve a request to modify or remove existing Epic (Connect Care) access

 If you received an email from Identity Services Management that an access request requires your approval, follow these steps.

 **BEFORE** proceeding, **CONFIRM** the end-user's access needs before removing any or all access to Epic (Connect Care).

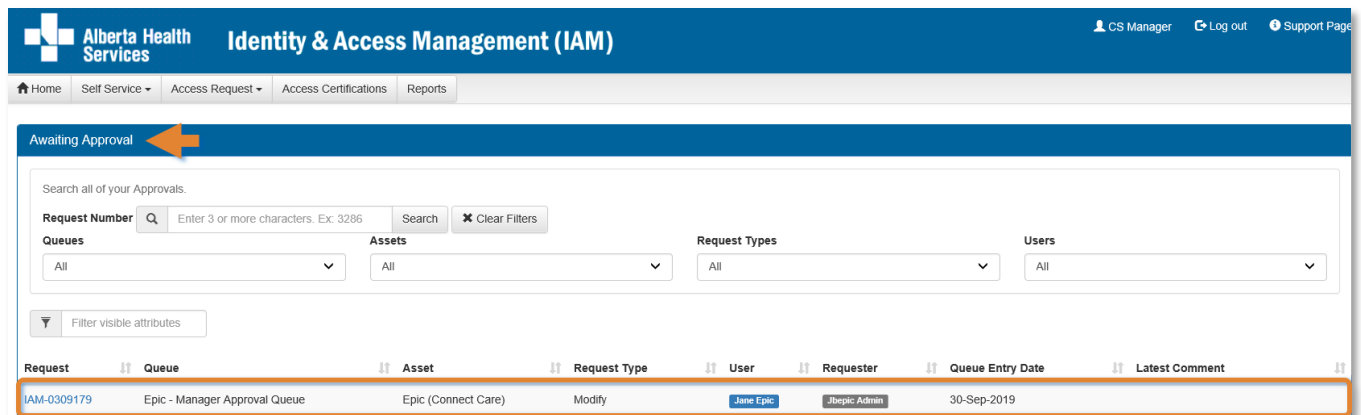
ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
LOGIN

In the **Access Requests** pane, notice a new work **Approval** item is waiting



CLICK **Approvals**

The **Awaiting Approval** screen will appear



CLICK the [Request](#) number


The **Pending Approval** screen appears with the request [Waiting](#) for [Manager Approval](#).

REVIEW the  [Epic \(Connect Care\) Access Criteria Bundle](#).

The modified content is highlighted with both a  [Modified](#) label and an  exclamation mark.

## Tool Tips for approving an Epic (Connect Care) modify access request

### At Your Comments


Comments you enter can only be seen by other approvers during the request. Comments cannot be seen by the user or [Requester](#). If you see this comment icon  on a work item, it means an [Authorized Approver](#) has left a comment.

### At Approve, Deny, Save



#### [Approve](#)

This approves the request and closes the screen. The **Request Status screen** will appear showing the request as [Complete](#). The message, “[Success – Work Item Processed](#).” will appear in the top left corner. There will be one less item in your [Approval](#) queue. An automated email will be sent from Identity Management to the Requester informing them the request was approved.

**✖ [Deny](#)** – will deny the request and require a reason to be entered in the verification pane. The **Awaiting Approval** screen will appear and the denied request no longer listed. At the **AHS IAM**  **Home** screen, there will be one less item in your [Approval](#) queue. An automated email will be sent from Identity Management to the Requester informing them the request was denied.

[Save](#) – will save your changes and leave the screen open. You can leave the approval screen without losing your change. You can re-open the request for review at another time. Requests for Approval will remain in your queue for 10 business days before they time-out and are automatically denied and closed.



CHANGE information as needed and permitted

ENTER [Comments](#) as needed

CLICK [Approve](#)


Note the on-screen message, “**Success** [Work Item Processed](#).” shaded in green in the top left corner.

CLICK  [Home](#)

The **AHS IAM**  **Home** screen appears


In the [Access Requests](#) pane, you will see one less item in the [Approvals](#) queue.

Your role as the Authorized Approver is complete.

 For modify / remove requests that include Dragon Medical One and / or 3M Health Information Systems – the appropriate Provisioning Administrator will be sent an automated email from Identity Management telling them a Work Item requires their attention. Once the Work Item is completed, and the end-user has completed any required training (as applies), the request will automatically complete and the end-user’s access to [Epic \(Connect Care\)](#) will be modified / removed.

Complete 

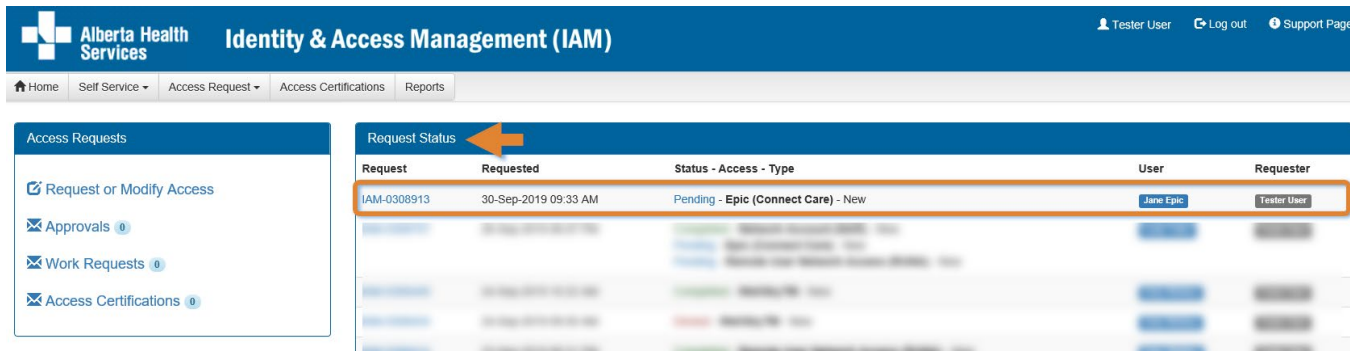
## Cancel a submitted request

 If, after submitting an access request, you determine it is no longer needed, you can cancel it. This process can only be performed on incomplete access requests. This can only be performed by the person who submitted the request.

ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
LOGIN

The **AHS IAM**  **Home** screen appears

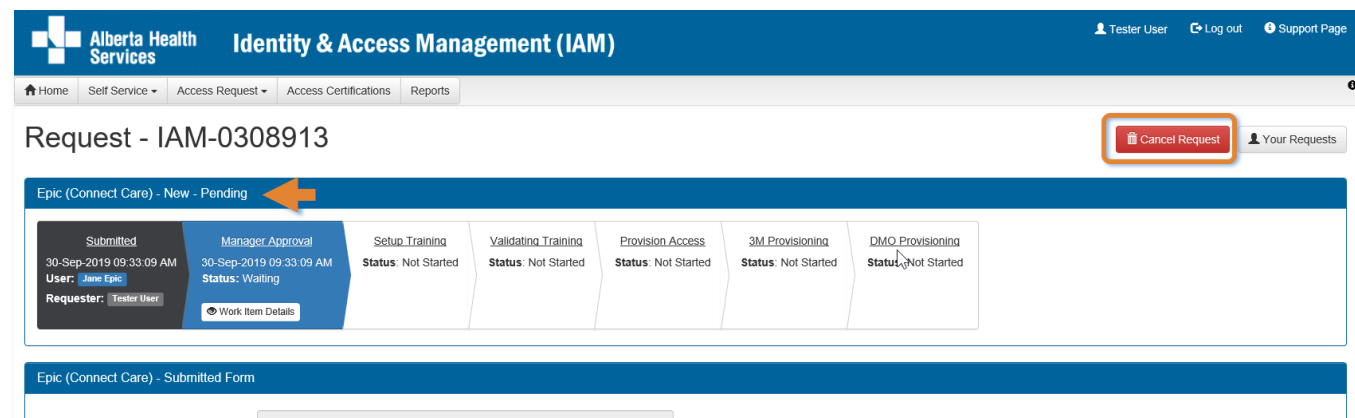
At the **Request Status** pane the request appears with at **Status** of **Pending**



The screenshot shows the AHS IAM Home screen. The 'Request Status' pane is highlighted with an orange arrow pointing to a table row for request IAM-0308913, which is in 'Pending' status.


Request	Requested	Status - Access - Type	User	Requester
IAM-0308913	30-Sep-2019 09:33 AM	Pending - Epic (Connect Care) - New	Jane Epic	Tester User

CLICK on the **IAM-#####** of the access request you submitted and now want to cancel  
The **Request Status** screen appears



The screenshot shows the 'Request - IAM-0308913' screen. The 'Cancel Request' button is highlighted with an orange box. The 'Submitted' status is highlighted with an orange arrow.

**Request - IAM-0308913**

**Cancel Request** 

**Epic (Connect Care) - New - Pending**

Submitted	Manager Approval	Setup Training	Validating Training	Provision Access	3M Provisioning	DMO Provisioning
30-Sep-2019 09:33:09 AM User: Jane Epic Requester: Tester User	30-Sep-2019 09:33:09 AM Status: Waiting	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started	Status: Not Started

**Epic (Connect Care) - Submitted Form**

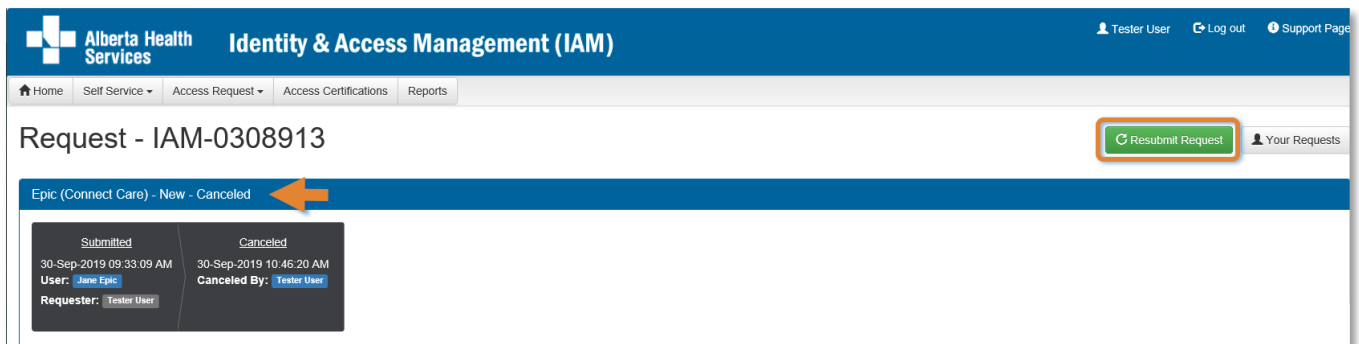
CLICK **Cancel Request**

A verification message appears



CLICK [Cancel Request](#)

The **Request Status** screen appears showing the request as [Canceled](#)

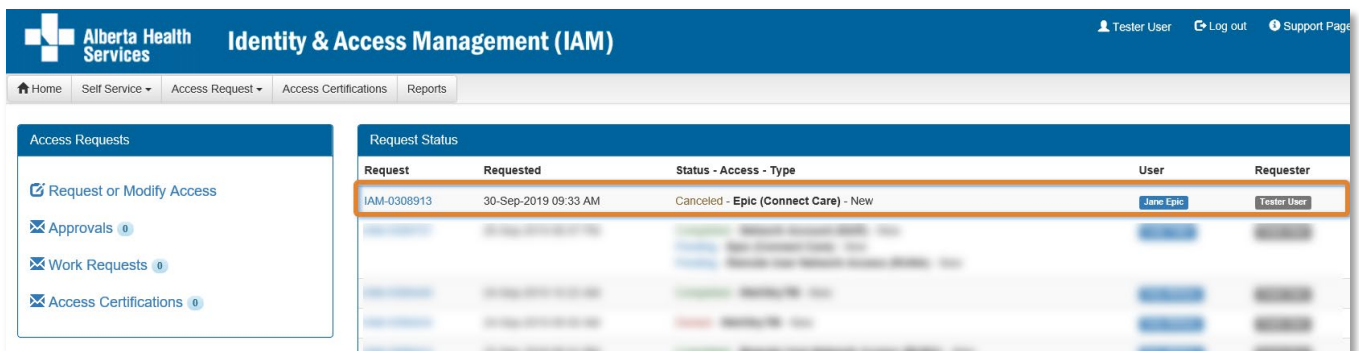


If you want to resubmit the request now or in the future CLICK [Resubmit Request](#).  
For instructions, please see the [Resubmit a Denied or Cancelled Request](#) process in this Guide.

CLICK [Home](#)

The **AHS IAM Home** screen appears

In the [Request Status](#) pane, you will see the request [Canceled](#).



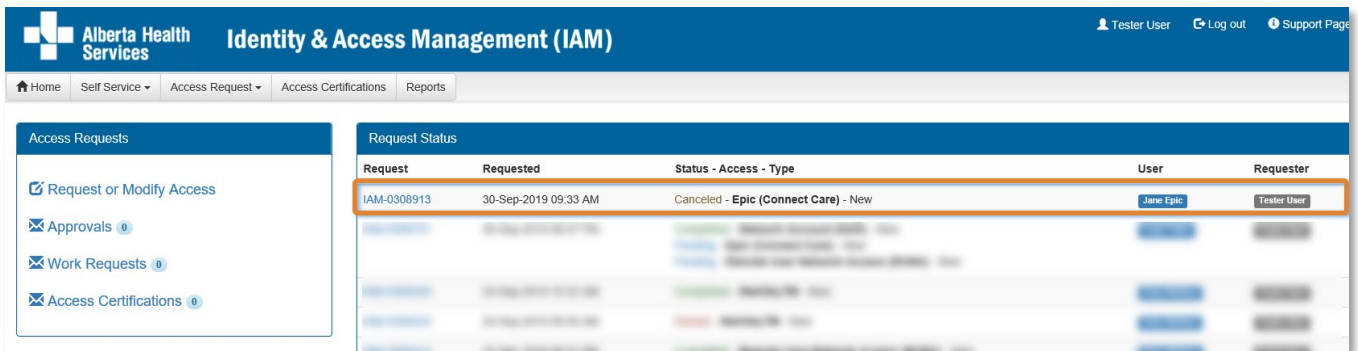
Complete 

## Resubmit a Denied or Cancelled Epic (Connect Care) request

 This process can only be performed by the [Requester](#) on a request that was submitted and denied or cancelled.

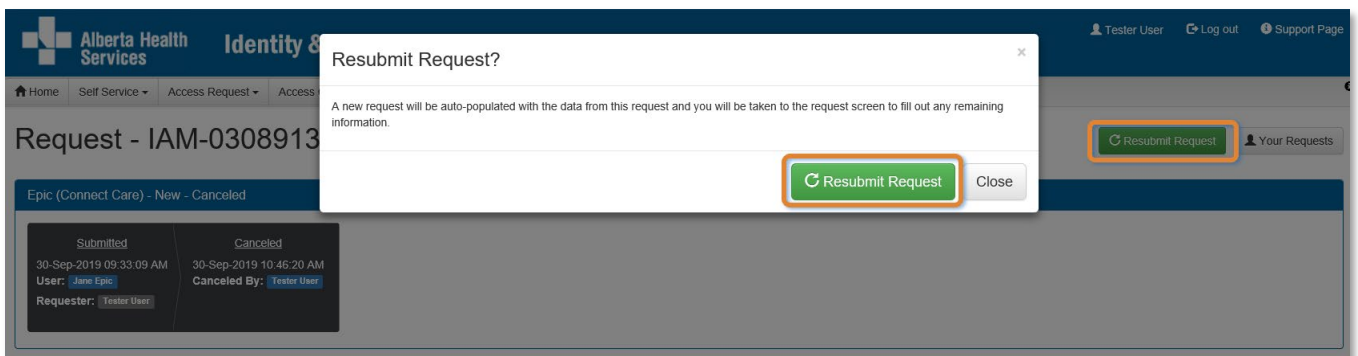
ENTER the AHS IAM URL into your internet web browser ➡ <https://iam.albertahealthservices.ca>  
LOGIN

The **AHS IAM**  **Home** screen appears



Request	Requested	Status - Access - Type	User	Requester
IAM-0308913	30-Sep-2019 09:33 AM	Canceled - Epic (Connect Care) - New	Jane Epic	Tester User

In the **Request Status** pane, the **Denied** or **Canceled** access request is displayed  
CLICK **IAM-#####** of the request you want to resubmit  
The **Request – IAM-#####** screen displays



**Resubmit Request?**


A new request will be auto-populated with the data from this request and you will be taken to the request screen to fill out any remaining information.

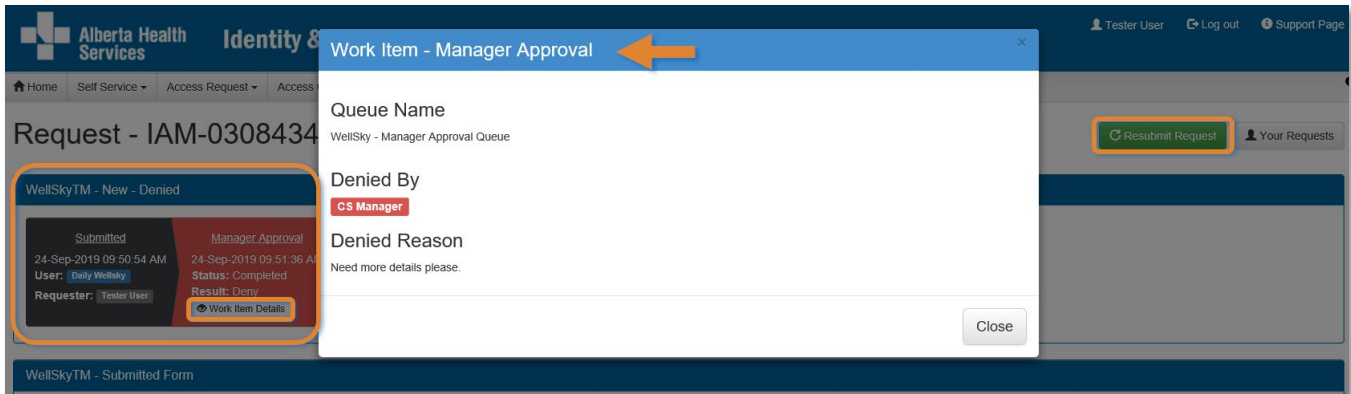
[Resubmit Request](#) [Close](#)

**Request - IAM-0308913**

Epic (Connect Care) - New - Canceled

Submitted	Canceled
30-Sep-2019 09:33:09 AM User: Jane Epic Requester: Tester User	30-Sep-2019 10:46:20 AM Canceled By: Tester User

 Here is a sample of a request that was denied. Note the **Request Status screen**. You can discover the reason it was denied by [CLICKING on Work Item Details](#). A **Work Item – Manager Approval** pop up screen appears. Note the [Entitlement Manager / Authorized Approver's comments](#). [CLICK Close](#).



The screenshot shows the 'Request - IAM-0308434' page. A 'WellSkyTM - New - Denied' message is displayed. The 'Submitted' section shows the date '24-Sep-2019 09:50:54 AM', user 'Bally WellSky', and requester 'Tester User'. The 'Manager Approval' section shows the date '24-Sep-2019 09:51:36 AM', status 'Completed', result 'Deny', and a 'Work Item Details' link. A 'Work Item - Manager Approval' pop-up window is open, showing the 'Queue Name' as 'WellSky - Manager Approval Queue', 'Denied By' as 'CS Manager', and 'Denied Reason' as 'Need more details please.' The pop-up has a 'Close' button.

CLICK [Resubmit Request](#)

The **Resubmit Request?** dialogue box appears

READ the on-screen message that appears

CLICK [Resubmit Request](#)

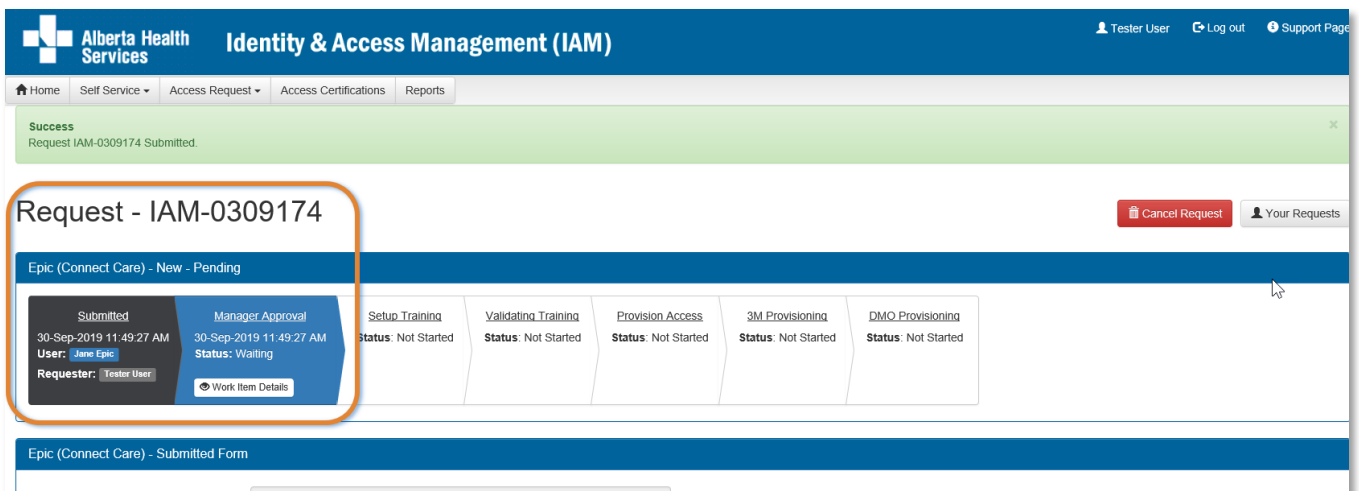
The **Complete Access Request** screen displays with the end-user's details displayed

REVIEW the  [Epic \(Connect Care\)](#) form information

If needed, **CHANGE** any request details

CLICK [Submit Request](#)

The **Request Status screen** appears with the message, "[Success Request IAM-##### Submitted.](#)" displayed in the top left corner.



The screenshot shows the 'Request - IAM-0309174' page. A green 'Success' message at the top states 'Request IAM-0309174 Submitted.' The 'Epic (Connect Care) - New - Pending' section is highlighted with an orange box. It shows the 'Submitted' date '30-Sep-2019 11:49:27 AM', user 'Jane Epic', and requester 'Tester User'. The 'Manager Approval' section shows the date '30-Sep-2019 11:49:27 AM' and status 'Waiting'. A 'Work Item Details' link is present. Below this, a table lists various provisioning steps: 'Setup Training', 'Validating Training', 'Provision Access', '3M Provisioning', and 'DMO Provisioning', all with a status of 'Not Started'. A 'Cancel Request' button and 'Your Requests' link are visible in the top right.

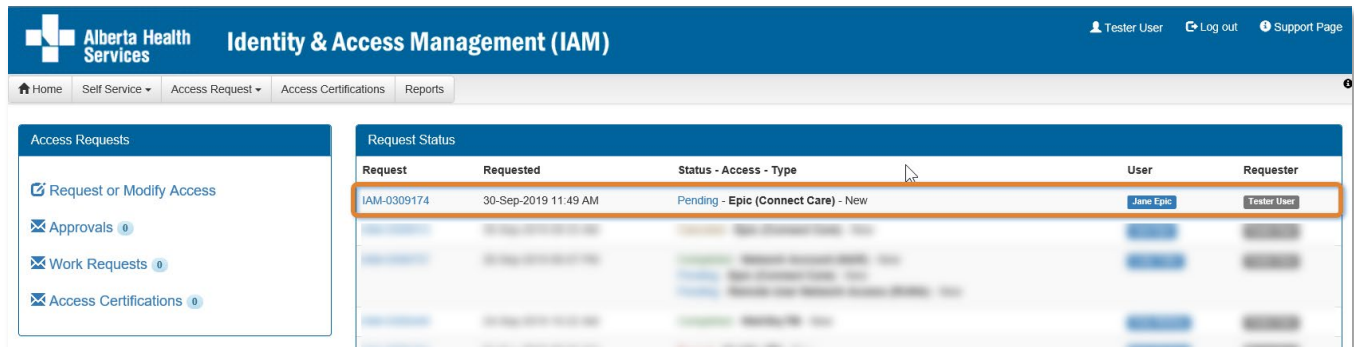
The **Manager Approval** step has a status of **Waiting**

The **Entitlement Manager** / Authorized Approver will be sent an email notification from Identity Management telling them a request requires their approval


CLICK  **Home**

The **AHS IAM**  **Home** screen appears

In the **Request Status** pane, you will see the request is **Pending**




Request	Requested	Status - Access - Type	User	Requester
IAM-0309174	30-Sep-2019 11:49 AM	Pending - Epic (Connect Care) - New	Jane Epic	Tester User

 You can monitor the progress of the request here. Once the **Entitlement Manager** / Authorized Approver approved the **Epic (Connect Care)** access, and the end-user has completed their **Epic (Connect Care)** training, access will be provisioned for the end-user and the request will display as **Completed**. The end-user can access **Epic (Connect Care)**.

Complete 


## Modify a pending Epic (Connect Care) Access Request

 Only the original [Requester](#) can modify a [Pending](#) access request.

ENTER the AHS IAM URL into your internet browser ➡ <https://iam.albertahealthservices.ca>  
LOGIN

The **AHS IAM**  **Home** screen appears

In the [Request Status](#) pane CLICK on the [IAM-##### Pending](#) request you wish to modify

Request Status				
Request	Requested	Status - Access - Type	User	Requester
<a href="#">IAM-0311128</a> 	11-Oct-2019 09:36 AM	<a href="#">Pending - Epic (Connect Care) - New</a>	<a href="#">Terry Peterson</a>	<a href="#">CS Manager</a>
<a href="#">IAM-0311123</a>	10-Oct-2019 12:34 PM	<a href="#">Pending - Epic (Connect Care) - Modify</a>	<a href="#">Chanin Sullivan</a>	<a href="#">CS Manager</a>
<a href="#">IAM-0311122</a>	10-Oct-2019 12:24 PM	<a href="#">Pending - Epic (Connect Care) - New</a>	<a href="#">Mirela Sumera</a>	<a href="#">CS Manager</a>
<a href="#">IAM-0311121</a>	10-Oct-2019 12:24 PM	<a href="#">Canceled - Epic (Connect Care) - New</a>	<a href="#">Terry Peterson</a>	<a href="#">CS Manager</a>
<a href="#">IAM-0311119</a>	10-Oct-2019 12:23 PM	<a href="#">Completed - Epic (Connect Care) - New</a>	<a href="#">Janice A Borle</a>	<a href="#">CS Manager</a>
<a href="#">Show All</a>				


The **Request** screen appears

CLICK **Cancel Request**

A verification pop-up message will appear

Cancel Request?

Are you sure you want to cancel the request? This will cancel all assets that are still pending.

 **Cancel Request**
Close



CLICK **Cancel Request**

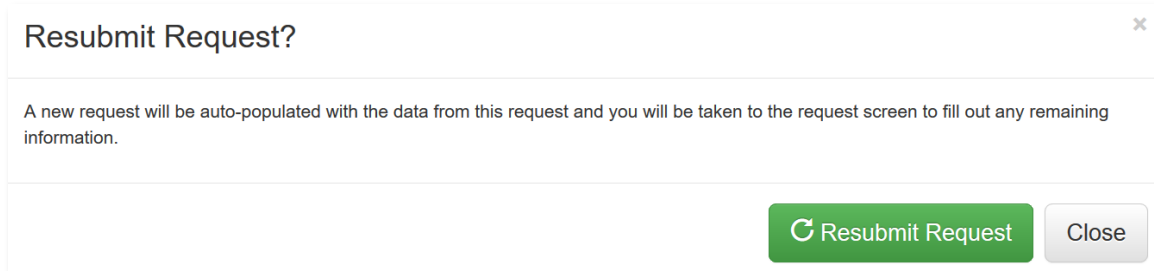
The **Request-IAM-#####** screen appears





CLICK [Resubmit Request](#)

A **Resubmit Request?** verification pop-up message will appear



CLICK [Resubmit Request](#)

The **Complete Access Request** screen will appear with previously entered information displayed

ADD or REMOVE [Access Criteria Bundles](#) as needed

REVIEW the [Access Criteria Bundle pane\(s\)](#) to review the modifications.

CLICK [Submit](#)

The **Request Status** screen appears

The request will follow the provisioning flow.

CLICK [Home](#)

The **AHS IAM Home** screen appears

Complete 

