WORK INSTRUCTIONS for

Creating Monash SeRP Accounts requested by Partner Institutions

1. **PURPOSE**

To provide steps for creating Monash SeRP Accounts requested by Partner Institutions.

**Definitions**:A Partner institution is an organisation that is external to Monash University. A partner institution would also refer to Monash Health.

Pre-requisites:

* Partner institution has a SeRP collaboration agreement in place with Monash University. As such, this process assumes there is a support structure in place at the partner institution to manage this process.
* A secure Google Drive folder has been created for transfer of files between Monash University and the Partner institution with access provided to the individuals supporting this process at the Partner Institution.

1. **RESPONSIBILITIES**

* Partner institution administrators will have verified the identity of users prior to requesting a Monash SeRP Account.
* Correspondence from Monash SeRP administrator will be via [safehavens@monash.edu](mailto:safehavens@monash.edu). Where possible Partner institution administrators will liaise with Monash SeRP administrators using a group administrator account e.g. [dpau@unsw.edu](mailto:dpau@unsw.edu) and not via personal email.

1. **PROCEDURE**
2. Partner institutions gather a list of user requests and user details (internal process).
3. Partner institution updates spreadsheet on secure Monash University Google shared drive with the following minimum set of information for each user request:
   1. First name
   2. Last name
   3. Email address
   4. Mobile phone number
   5. Institution
   6. SeRP Account Creation status - New (see status definitions)
   7. Project end date - if a user is assigned to multiple projects with different end dates, enter the furthest project end date.
4. Spreadsheet checks for duplicates by matching name and email address
5. Partner institution resolves duplicates
6. Partner institution emails [safehavens@monash.edu](mailto:safehavens@monash.edu) to notify Monash of the request.   
   Details to include in email:
   1. Subject line: Monash SeRP <institution name e.g. DPAU> account creation request
   2. Email content to include:
      1. Brief instruction to request SeRP accounts to be created
      2. Link to the spreadsheet
      3. Additional information or instructions for Monash University (optional)
7. System automatically creates a help desk ticket and sends an automatic email to the requester to confirm receipt.
8. Monash SeRP Administrator acknowledges receipt of the ticket.
9. Monash SeRP Administrator reviews the request and the spreadsheet. If there are errors/missing information, Monash SeRP Administration will reply to the ticket to resolve the issue.
10. Monash SeRP Administrator submits request to Monash eSolutions to create Monash affiliate account(s) (internal Monash process)
11. Monash eSolutions sends notification email to Monash SeRP Administrator when accounts are created (approx. 1-2 business days)
12. Monash SeRP Administrator creates the account in SeRP
13. Monash SeRP Administrator updates spreadsheet for each user:
    1. Status – Created
    2. Expiry date (set to next June or December expiry period, at least 6 months)
14. Monash SeRP Administrator sends Monash affiliate account activation email directly to the user. Each Partner institution will have a template for the email, see table below. Where a Partner template is not available, use the following default text:

*Dear <Name of end user>*

*Your Monash account has been created and now requires you to activate the account. Please follow the steps in the attached “Getting Started” document to activate your account and access Monash SeRP.*

*Should you have any questions or encounter any problems during this process, please email Monash safehaven on Safehavens@monash.edu and quote the eticket number <Add eticket number>*

1. Monash SeRP Administrator notifies the Partner institution that accounts have been created (via ticket)
2. Safehavens ticket is closed
3. Partner institutions can reply to the ticket to re-open the request, if any error/missing information is found.

**Email template**

Use the following partner templates, if no template is available for the partner, use the standard template, in step 13, above.

| **Institution** | **When to use** | **Email text** |
| --- | --- | --- |
| DPAU | When accounts have been raised by dpau@unsw.edu | Dear <Name of end user>,  Your DPAU account has been created and now requires you to activate the account.  Please follow the steps in [DPAU Account Activation Guides](https://www.dementiasplatform.com.au/sites/default/files/documents/DPAU_Account_Activation_Guides.pdf) and [DPAU Analysis Environment User Guides](https://www.dementiasplatform.com.au/sites/default/files/documents/DPAU_Analysis_Environment_User_Guides.pdf) to activate your account and access the Analysis Environment.  We recommend you download the [DPAU Analysis Environment Cheat Sheet](https://www.dementiasplatform.com.au/sites/default/files/documents/DPAU_Analysis_Environment_Cheat_Sheet.docx) and save it on your desktop for future references.  If you experience any troubles activating or accessing your account, please contact Monash SeRP support on safehavens@monash.edu and quote the eticket number <Add eticket number>. For any other questions and/or issues, please contact DPAU on dpau@unsw.edu.au and quote your project ID, project name and username. |

1. **REFERENCES**
   1. **Internal**

* [Spreadsheet template](https://docs.google.com/spreadsheets/d/1MF14-71VCbWWsHXIFBoov6VJe3tbwVXgP1n9NU3WjCc/edit?usp=sharing)
* Monash onboarding communications templates and user guides:
  + [Communications Templates](https://drive.google.com/file/d/1f54mOrMF13PEL2vtmGdPhWkt3h6tK966/view?usp=sharing)
  + [Getting Started Guide](https://drive.google.com/file/d/1hZKgSo_EoDYGBJVKTa2_PlqSEUvU1OEy/view?usp=sharing)
  + [Support Portal](https://monasheresearch.freshdesk.com/support/home)

**Status definitions**

| **Status** | **Definition** |
| --- | --- |
| New | New user who has not previously had access to SeRP |
| Renewal | A user whose account is approaching expiration and requires renewal |
| In Progress | The account is being processed by Monash SeRP Administrator |
| Complete | The account has been created |
| Expired | The account has expired and was not renewed |
| Removed/Rejected | The account was not created. Update Notes section to include reason for example, duplicate user. |
| Disabled | The account has been disabled before expiry. Update Notes section to include reason for example, if the user has left the organisation prior to project expiry. Data still remains linked to the user but the user will no longer be able to access the account |

| DOCUMENT HISTORY | | |  |
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| Version no. | Date of Issue | Reviewed by: name | Amendments |
| DRAFT | 08/04/2021 | Karin Quadros | Created - reviewed by Mat Ishac and UNSW DPAU representatives |
| 1 | 08/04/2021 | Mat Ishac, Rory Chen, Vibeke Catts, Juan Carlo San Jose | Updates made to duplicate entry check and status definitions |
| 2 | 03/08/2021 | Mat Ishac, Rory Chen, | Process and email template update, following feedback from UNSW end user |
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