Account Request Process for J-1 Scholars and Interns

1) In the My.CalPoly.edu portal menu select Technical Service Request from the Single Click Access menu.
2) Select New Account Request
3) Complete information for the Requestor (you).
4) For the Account Recipient information, follow the directions in the yellow box (shown below).
   a. Enter “Anonymous Other” for the Rec Username Lookup since this person has no username yet.

5) Under Request Details, select New Account and Request Sub-Type is Affiliated User Account.
6) Complete the information for your visiting scholar, including the program participation dates at Cal Poly. For Relationship to CP, select Visiting Scholar from the drop-down list.

7) Complete information on your Approver and your Dean or Associate Dean.
8) Enter your chart field. NOTE: Information Services is not currently charging departments anything to do this, but it is still required on the form.
9) Select the Systems your visitor will need. (E-mail/Calendar at a minimum).
10) Read the appropriate Usage Agreement then click both usage agreement checkboxes.
11) Check Ready for Approval if you are ready to submit the request now. If you just want to save it and finish it later, you can do that.
12) Enter in the Requester Notes: “NOTE: This Visiting Scholar has a PeopleSoft record as a Person of Interest. His/her Empl ID is: XXXXXXXX. Please do not create a duplicate PeopleSoft record.”

IS will send e-mails to your approvers to obtain electronic approval. You will be notified when the account is approved.