Overview and Directions for using EHS Integrator to request Research Reactivation

Summary – This document provides directions for how to access, edit, and submit registrations for research reactivation in EHS Integrator. An overview of different “registrations” to use is outlined here: Pathways to Research Reactivation.

EHS Integrator is accessed via [https://ehsis.yale.edu/EHSIntegrator/](https://ehsis.yale.edu/EHSIntegrator/) - VPN connection required – see details below. On the left-hand menu select “COVID-19” to access detailed information on which registration to use and direct links to those registrations. Alternatively, after reviewing Pathways to Research Reactivation, you are an experienced EHS Integrator user, or you wish to amend an existing registration, you may wish to select “Registration.”

Sections included in this document:

1. Basic EHS Integrator navigation
   a. Video using an example of Phase 1 research reactivation.
   b. Text description of basic navigation in EHS Integrator
   c. Text description navigating within a registration including submission.

2. Detailed directions on how to ADD or REMOVE an individual from your EXISTING registration:
   a. Add/Remove Phase 1 or Phase 2 eligible individuals (faculty, staff, and trainees (postdocs and graduate students)).
   b. Add/Remove Phase 3 eligible individuals (undergraduates enrolled in residence and semester-long academic visitors).

1. Basic EHS Integrator navigation
   a. Video using an example of Phase 1 research reactivation. This is a 3-minute video and has no sound.
   b. Basic navigation after entering EHS Integrator:
      i. From the Home page the left-hand menu will provide different options:
         1. Select COVID-19 to see which pathway to follow and a clickable map similar to Pathways to Research Reactivation.
         2. Select “Registration” on the left-hand side of the screen.
      ii. Enter your name in the “Search Principals” function if prompted. Select your name.
      iii. You will be on the EHS Registration page which is divided into three sections
         1. Left-hand side - overall navigation (for example back to the homepage)
         2. Middle section – List of your unsubmitted, pending, and authorized registrations
            a. If you have an authorized registration, you may renew, amend, or close it by selecting “More” and the appropriate item. For research reactivation, “amend” will be the most useful as you may add or remove individuals provided they are eligible for the given phase.
         3. Right-hand side – List of available registrations
            iv. Select the appropriate path.
      c. Navigating within a Registration

For help or questions about EHS Integrator – call 203-737-2122 or email ehsintegrator@yale.edu
i. Once in a registration:
   1. Tabs below the header allow you to navigate to different sections of the registration.
   2. Tabs/sections vary by registration but generally occur in order from left to right – REMEMBER to Save or Save & Continue when navigating between tabs.
      a. Overview - Title may be requested and entered here.
      b. Building Area(s) – Frequently required before proceeding
         i. Add Principal Building Areas – For principals that have existing registrations, this allows you to select spaces that occur in prior registrations or are affiliated with your profile.
         ii. Add All Principal Areas – Adds all spaces you have previously used or that exist in your profile.
         iii. Add Building Areas – Uses a look up function to select any Yale building or room.
      c. Assistants (individuals to be included in the registration) – May be other faculty, staff, postdocs, graduate students, or undergraduates (when allowed).
         i. Add Principal Assistants – For principals that have existing registrations, this allows you to select individuals included in prior registrations or those affiliated with your profile.
         ii. Add All Principal Assistants – Adds all individuals you have previously listed or those affiliated with your profile.
         iii. Add from full Person List – Uses a look up function to select from a list of Yale personnel.
      d. Questions – A series of questions developed to allow the reviewers to understand the plan being proposed.
      e. Documents – An opportunity to upload documents if requested or desired.
      f. Report – This will generate an overview of the questions and answers provided. It will indicate that you have uploaded documents but will not display them. You may use print icon to generate a copy of the registration. In theory, this should work in any browser but anecdotally Chrome may function better.
      g. Submit to EHS – Should there be any validation errors, these will be noted. If you are the principal, you are approving the registration. If you are preparing the registration on behalf of someone, the principal will need to approve the registration.

3. NOTE: You may save your work and return later. Upon completing the form, please complete your submission by selecting “Submit to EHS.”

2. Detailed directions on how to ADD or REMOVE an individual from your EXISTING registration:
   a. Add/Remove Phase 1 or Phase 2 eligible individuals (faculty, staff, and trainees (postdocs and graduate students – NOT undergraduates or visitors)) – if you have an existing registration, ADD or REMOVE an assistant:
      i. Open EHS Integrator
      ii. From the Home page, select “Registration” on the left-hand side of the screen.
      iii. Enter your name in the “Search Principals” function if prompted. Select your name.

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iv. Locate your authorized registration in the middle section of the Registration page.

v. Immediately adjacent to the authorized registration, select the carrot adjacent to “More” then select “Amend” which is immediately to the right of your authorized registration.

vi. Your registration will be available to you after confirming you wish to amend it. (You can still cancel later if necessary). Add the assistants and make any necessary changes. Note the changes when requested and ‘Submit to EHS.’

b. Add Phase 3 eligible individuals (undergraduates enrolled in residence and semester-long academic visitors). Note: If you are removing Phase 3 individuals, you would follow the directions above for Add/Remove from an existing registration.

i. Enter EHS Integrator

ii. From the Home page, select “Registration” on the left-hand side of the screen.

iii. Enter your name in the “Search Principals” function if prompted. Select your name.

iv. In the right-hand section of the Registration page, select “Phase 3 – Undergrad (Spring 2021)” for undergraduate registration or “Phase 3 – Academic Visitors” for academic visitor registration.

v. Using “Add from full Person List,” select the Phase 3 individual(s) you wish to add.

vi. “Save & Continue”

vii. Select the “Questions” tab – if just adding someone:

1. Indicate “Yes” to “Do you have a prior Phase 1 or Phase 2 lab registration for which you would like to add a Phase 3 eligible individual (undergraduates enrolled in residence and semester-long academic visitors)?”

2. Indicate “Yes” to “Are you only adding or removing Phase 3 eligible individuals?”

3. Read and confirm that you will comply with the attestation.

viii. “Save & Continue”

ix. View “Report” and print if you wish

x. “Submit to EHS”

VPN Connection Required - Please note that you must be on the Yale network to access EHS Integrator. If you are not on the Yale network or Yale Secure wi-fi, you must first begin a VPN secure connection (via Cisco Any Connect). Contact the ITS Help Desk (available 24/7) at helpdesk@yale.edu or 203-432-9000 for help with VPN.

Questions? Should you have any questions about the use of Integrator, please contact EHS for assistance at ehsintegrator@yale.edu or 203-737-2122. If you have questions about how to respond to a given question, please contact your unit leader.