Information for Sponsors of External Core Customer (ECC) POIs
February 11, 2022

Required Harvard POI Portal Training
Before you will be allowed to log in to the POI portal to sponsor an ECC POI, you will have to complete the required one-time Harvard POI training—a 15-20 minute course on the Harvard Training Portal. The link to the training can be found on the HMS POI website.

Local Approvers for ECC POIs
The Local Approvers for ECC POIs sponsored by HMS research cores will be the Local Approvers that have been set-up for the HMS Department that oversees each core. For example, for the Immunology Flow Cytometry Core, the Local Approvers will be in the Immunology Dept.; for the Bio-NMR Core, the Local Approvers will be in the BCMP Dept.; and for ICCB-Longwood, the Local Approvers will be the Independent Cores administrators. A full list of HMS Research Cores currently eligible to sponsor ECC POIs and their Local Approvers can be found on the HMS POI website (https://it.hms.harvard.edu/our-services/accounts-and-user-access/person-interest-poi). Please connect with your Department if you have any questions about the Local Approval process.

HMS-approved core User Agreement
An important requirement for ECC POIs is that they must sign an HMS-approved core user agreement. All HMS research cores have been provided with HMS approved external user agreement templates. Please email John Goettelmann or Caroline Shamu if you have any questions about the external user agreement templates for your core.

Acknowledgment of Risk and Release of Claims
This form is only required for in-person or on-campus access. It is not required for HMS-affiliated hospital employees. Here is a link to the Harvard Risk and Release form. There are also links to this form on the HMS POI website.

Instructions for filling in your Sponsor information in the POI portal
So that ECC POI requests can be routed appropriately for approval, and then tracked and reported on, each core will need to enter their core-specific "Peoplesoft Department" information in the *Role Information* section of the POI Sponsor form. A full list of HMS Research Cores currently eligible to sponsor ECC POIs and their Local Approvers can be found on the HMS POI website (https://it.hms.harvard.edu/our-services/accounts-and-user-access/person-interest-poi). Please connect with your Department if you have any questions about the Local Approval process.

A screen shot of the POI portal Sponsor Information page is pasted below. Once a Sponsor enters their Name/HUID into the first field, their POI sponsor information will auto-populate the top of the form. Testers of the form have found that the Sponsor's appointing HMS Department will be auto-filled in two places:

1. In the POI Sponsor Information section [indicated by the **green circle** "Auto-filled"]
2. In the Role Information section [indicated by the orange circle "Edit this one"]

In the second [orange] "Department" field, the one in the Role Information section, use the drop-down list to search for and choose the Peoplesoft Department for your core. Then fill in the rest of the information as directed by the Portal.

HMS ID (formerly known as eCommons ID) credentials for ECC POIs
The ECC POI process and the HMS Guest ID process are not currently integrated. At the moment, if a core user will not be visiting the HMS campus, and therefore needs only an HMS ID/eCommons ID (e.g. for access to PPMS, and/or HMS Research Computing Services), they do NOT need to be sponsored as an ECC POI. HMS ID guest accounts can be requested via HMS IT at: https://it.hms.harvard.edu/our-services/accounts-and-user-access/hms-guest-accounts

Harvard University ID (HUID) credentials for ECC POIs
Once an EEC POI has been approved for an HUID via the POI Portal, the core user will make a request for HUID cards via the Longwood ID Office at idoffice@hsph.harvard.edu. Your Departmental Administrator will also be able to provide guidance, as needed.

Please contact hmspoi@hms.harvard.edu, or Caroline Shamu and John Goettelmann, if you have any questions about the ECC POI sponsor/approval process.