

Information for Sponsors of External Core Customer (ECC) POIs

July 20, 2021

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. The University suggests that all potential POI sponsors complete this training before July 31.

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 [here](#). Please connect with your Department if you have any questions about the Local Approval process.

HMS-approved core User Agreement with Risk and Release language

An important requirement for ECC POIs is that they must sign an HMS-approved core user agreement that contains Harvard risk and release language. **As of July 20, 2021, the School is still working to draft an interim agreement form that can be used until a custom core user agreement has been developed for each HMS research core.** Once the interim user agreement form is ready, it will be sent to all eligible ECC POI sponsors. Until then, the School will provide guidance, on a case by case basis, re: what user agreement form can be used for ECC POIs. Please email Caroline Shamu and John Goettelmann if you need to sponsor an ECC POI before the School-approved core user agreement form is available.

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. The Peoplesoft Department names for all HMS research cores that are eligible to sponsor ECC POIs can be found [here](#).

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.

POI Portal

Home | Request New POI

POI Sponsor Information

Switch Sponsor & Sponsor Delegate

Sponsor Name (HUID)
Last Name, First Name or HUID

Harvard Email

School/Business Unit

Department Auto-Filled

POI Sponsor Delegate Information (Optional)

Sponsor Delegate (HUID)
Last Name, First Name or HUID

Harvard Email

School/Business Unit

Department

Role Information

School/Unit

Department Edit this one

Role Type

Company

Create New Company

Role Title

Family Member (HUID)

Role Start
MM/DD/YYYY

Building

HMS ID (formerly know as eCommons ID) credentials for ECC POIs

The ECC POI process and the HMS Guest ID process are not currently integrated, although this may change in upcoming weeks or months. 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 the HMS IT ServiceNow portal at: <https://harvardmed.service-now.com/stat>

Harvard University ID (HUID) credentials for ECC POIs

As far as we know, 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 idooffice@hsph.harvard.edu just as they did before July 15, 2021. As we are made aware of any changes to the process, updates will be made to the HMS POI website. 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.