POI Town Hall: Persons of Interest

Jan. 28, 2016  Thursday  10:30 a.m.-12:00 p.m.  Lamont Library
Agenda

• POI Town Hall Objectives
• One Identity for Life Paradigm
• POI Affiliations: Why Do We Care?
• Authorizer Rules and Regulations
• A View of POIs in MIDAS
• POI Processes
• New Notifications and Forms
• POI ID Card Eligibility and Provisioning
• Q & A
POI Town Hall Objectives

• Explain POIs in context
• Demystify the POI process
• Introduce new roles, forms, notifications, reports, etc.
• Create a platform for discussion and feedback
• Provide a great POI reference take-away (this presentation!)
One Identity for Life

• One Harvard identity, with multiple roles throughout the Harvard lifecycle
• Roles define an individual’s affiliations with Harvard
• POI roles include any affiliations that are not included in the others
• Most roles are associated to a School/unit, down to the department level
• Roles control access to a School/unit’s resources
Non-Authorized POI Affiliations

- HMC Employee
- Overseer
- Retiree
- Retired Hospital Affiliate
- Spouse of Retiree
- Spouse of Retired Hospital Affiliate

These roles do not require an authorizer, and only Overseer requires an end date.
## POI Non-Authorized Roles (6)

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overseer</strong></td>
<td>Member of the Board of Overseers</td>
</tr>
<tr>
<td></td>
<td><em>For use by OGB only; end date required</em></td>
</tr>
<tr>
<td><strong>HMC Employee</strong></td>
<td>Employee of Harvard Management Company</td>
</tr>
<tr>
<td></td>
<td><em>Optional end date</em></td>
</tr>
<tr>
<td><strong>Retiree</strong></td>
<td>Retired Harvard employee</td>
</tr>
<tr>
<td></td>
<td><em>No end date</em></td>
</tr>
<tr>
<td><strong>Spouse of Deceased Retiree</strong></td>
<td>Spouse of deceased retired Harvard employee</td>
</tr>
<tr>
<td></td>
<td><em>No end date</em></td>
</tr>
<tr>
<td><strong>Retired Hospital Affiliate</strong></td>
<td>Retired employee who held a Harvard appointment at a Harvard-affiliated hospital</td>
</tr>
<tr>
<td></td>
<td><em>No end date</em></td>
</tr>
<tr>
<td><strong>Spouse of Deceased Hospital Affiliate</strong></td>
<td>Spouse of deceased retired employee who held a Harvard appointment at a Harvard-affiliated hospital</td>
</tr>
<tr>
<td></td>
<td><em>No end date</em></td>
</tr>
</tbody>
</table>
**Authorized POI Affiliations: Why Do We Care?**

Authorized (sponsored) affiliations allow Harvard faculty and staff to give individuals outside of their School or organization — or outside of Harvard itself — temporary access to resources.

- Most variation of uses
- Potential exists for misunderstanding and misuse
- Need to know the reason for the POI affiliation, know the person, and control their access
- Requires an authorizer and role end date
- Role type = reason (e.g. volunteer)
## Existing Authorized POI Roles (8)

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultant</td>
<td>Person providing consulting services independently or through a firm</td>
<td><em>Example: Sole-proprietor technology consultant advising Harvard</em></td>
</tr>
<tr>
<td>Contractor</td>
<td>Temporary agency or independent worker contracted to augment staff</td>
<td><em>Example: Temp from an agency such as Randstad</em></td>
</tr>
<tr>
<td>Vendor</td>
<td>A company representative of a service provider to Harvard</td>
<td><em>Example: Copier repair or vending machine supply worker</em></td>
</tr>
<tr>
<td>Security</td>
<td>A company representative of a security services provider</td>
<td><em>Example: Securitas employee working at Harvard</em></td>
</tr>
<tr>
<td>Family Member</td>
<td>Harvard affiliate family member needing access to Harvard housing</td>
<td><em>Example: Spouse of a professor living in Harvard housing</em></td>
</tr>
<tr>
<td>Tenant</td>
<td>Individuals needing physical access to property leased from Harvard</td>
<td><em>Example: Harvard Real Estate resident, HMS lab space lease employee</em></td>
</tr>
<tr>
<td>Smithsonian Employee</td>
<td>Employee of the Smithsonian Astrophysical Observatory (SAO)</td>
<td><em>For use by SAO only</em></td>
</tr>
<tr>
<td>Other</td>
<td>Any other Harvard-authorized affiliation not listed here</td>
<td><em>Using this role requires an explanation in the Comments field</em></td>
</tr>
</tbody>
</table>
## New Authorized POI Roles (8)

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic Advisor</strong></td>
<td>Non-appointed academic advisor to a Harvard student</td>
<td><em>Example: Thesis advisor</em></td>
</tr>
<tr>
<td><strong>Collaborator</strong></td>
<td>Researcher or other type of academic or administrative collaborator</td>
<td><em>Example: Stanford researcher working with HKS on a joint project</em></td>
</tr>
<tr>
<td><strong>Field Ed Supervisor</strong></td>
<td>Non-appointed supervisor of a student in a field education placement</td>
<td><em>Example: Church pastor overseeing an HDS student’s in-field study</em></td>
</tr>
<tr>
<td><strong>Hospital Employee</strong></td>
<td>Harvard-affiliated hospital employee needing access to Harvard resources</td>
<td><em>Example: MGH employee who administers grants for Harvard faculty</em></td>
</tr>
<tr>
<td><strong>Incoming Employee or Transfer</strong></td>
<td>Individual with accepted job offer or interdepartmental transfer who needs access before their official start date</td>
<td><em>Example: Non-US citizen awaiting home country paperwork</em></td>
</tr>
<tr>
<td><strong>Inter-Affiliated Staff</strong></td>
<td>Harvard staff member who needs access to resources in multiple Schools</td>
<td><em>Example: Central Admin employee who works at one of the Schools</em></td>
</tr>
<tr>
<td><strong>Short-Term Guest/Visitor</strong></td>
<td>Short-term guest or visitor to Harvard</td>
<td><em>Examples: Visiting lecturer, seminar attendee</em></td>
</tr>
<tr>
<td><strong>Volunteer</strong></td>
<td>Unpaid worker supporting a Harvard department or School</td>
<td><em>Examples: Non-paid HLS clinical program worker, Aboretum volunteer</em></td>
</tr>
</tbody>
</table>
New Alternative Process for Incoming Employees

PeopleSoft does allow entry of future-effective-dated employees. Example: Faculty appointment entered 4/3/15 with an effective date of 9/1/16 and a role start date of 9/1/16

• Data is fed from PeopleSoft to MIDAS as “Future Effective Dated Employee”; these users will be provisioned with accounts as “Incoming Employees” as soon as role is detected (April)

• If early activation of email is needed, Accounts Team can set up

• It is up to the department to inform the user of their HUID so he/she can claim a HarvardKey

Alternative: Authorize a POI role of ‘ Incoming Employee’

• These individuals will also be provisioned with accounts as ‘Incoming Employees’

• Early activation of email can be requested
## Future Authorized POI Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delegate Student Account Payer</td>
<td>Parents or others responsible for paying a student’s bill</td>
</tr>
<tr>
<td>Instructional Affiliate</td>
<td>Individual instructing in another Harvard School who needs access to its resources</td>
</tr>
</tbody>
</table>

Let’s hear from you!
Authorizer Rules and Regulations

POI authorizers are accountable for how the POI uses Harvard resources; they may delegate administration of the POI role, but not the responsibility (new feature!).

Authorizers must meet the following requirements (see MIDAS Help file for a rule-refresher):

Is a current and active employee of Harvard University AND

1. Has an official email address recorded in the identity registry AND
   A. Is either Junior or Senior faculty OR
   B. Is a paid employee of one of the following categories:
      • A* Admin & Professional
      • O* Other Faculty
Administrator Rules and Regulations

POI administrators manage the POI role on behalf of an authorizer, and must meet the following requirements:

Is a current and active employee of Harvard University AND

1. Has an official email address recorded in the identity registry AND
   A. Is either Junior or Senior faculty OR
   B. Is a paid employee of one of the following categories:
      • A* Admin & Professional
      • I* TAs, Other Staff
      • O* Other Faculty
      • Z* Ext Post Docs Harvard Research
      • G* Graduate Students
      • N* External Post Docs NHR
      • Y* Internal Post Docs
      • S* Support Staff

OR

1. Has an official email address recorded in the identity registry AND
2. Has an active POI role of type “Contractor”
Applies to all **authorized** POI roles

- **School-Unit** (required)
- **Department**: choices limited to the School/Unit selected
- **Company**: if external
- **ID Line 1 & 2**: shown on ID card
- **Authorizer’s HUID** (required)
- **Authorizer Admin’s HUID**: role administrator
- **Start Date** (required): Defaults to the current date
- **End Date** (required): Defaults to one year after current date
- **Comments** (required for “Other” roles)

Check out the updated MIDAS Help file — and please use the Feedback link!
POI Creation Process

**Authorizer or Role Admin**
- Submits* online POI request form to create POI role

**ID Services, IAM Accounts, or local HR departments**
- In MIDAS: Adds POI role to an existing identity or creates a new person

**MIDAS**
- Sends email notice with HUID to authorizer; CC’s Administrator

**Person-of-Interest**
- Claims HarvardKey and has access to services

**Authorizer or Role Admin**
- if a new identity, informs POI of their HUID and instructs him/her to claim HarvardKey

**Authorizer or Role Admin**
- Submits online Central Admin User Account Request form for services (e.g. email)

*Forms sent from an authorizer or administrator’s email do not require a signature.*
POI Renewal or Termination Process

POI

Receives quarterly POI report (now via email!)

Authorizer or role admin

Emails* end date changes to iam_help@harvard.edu

Authorizer or role admin

In MIDAS: Updates POI role end date

IAM Accounts

May notify POI if POI role is renewed or terminated

POI

Continuation or discontinuation of services

Authorizer or role administrator

Sends email notice with new end date to authorizer; CC’s Administrator (new!)

MIDAS

*Requests for renewal or termination from authorizer or administrator’s email suffice as authorization.
POI Authorizer or Administrator Change Process

**Authorizer or role admin**
- Receives quarterly POI report (now via email!)
- May be notified by authorizer or administrator of the change

**New/existing authorizer or role admin**
- Emails* authorizer or role administrator changes to iam_help@harvard.edu
- May notify new authorizer or administrator of POI responsibility

**IAM Accounts**
- In MIDAS: Updates POI role authorizer or administrator
- Sends email notice to new authorizer; CC’s administrator

**POI**

**Prior authorizer or role administrator**

*Change requests from existing or new authorizer or administrator’s email suffice as authorization.*
POI Administration Duties

• Request the authorized affiliation

• Inform the user of his/her assigned HUID so he/she can visit key.harvard.edu and claim a HarvardKey

• Request services that are not automatically assigned (i.e. email); these requests are routed to the Accounts Team and they or a Field Support Technician closes the loop with the user

• Notify iam_help@harvard.edu or ithelp@harvard.edu when an authorized affiliation should be renewed or terminated
POI Forms

To request a POI
• Send the Person of Interest POI Authorized Identity Request Form to id_services@harvard.edu
  http://iam.harvard.edu/resources/forms

To request MIDAS access or to add POI role types to existing access
• Send the Request for MIDAS Access Form to iam_help@harvard.edu
  http://iam.harvard.edu/resources/forms

To request services for non-FAS users
• Submit the existing Central Admin User Account Request online
  http://services.huit.harvard.edu/central-administration-create-user-account-request-form

To request a FAS sponsored email account
• Send the FAS Sponsored Account Request Form to accounts@fas.harvard.edu
  http://huit.harvard.edu/pages/departmental-and-sponsored-email-account-form
New Notifications

• **POI Role End Date Change Notice:** Email to authorizer (CC’d to administrators) whenever the end date is changed in MIDAS

• **POI Role Authorizer Notice:** Email to new authorizers (CC’d to administrators) whenever a new POI role is created or authorizer changes; not sent to prior authorizer

• **Authorizer POI Report:** Email sent quarterly to POI authorizers listing all their POIs; includes names, expiration dates, and administrator names

• **Administrator POI Report:** Email sent quarterly to POI administrators listing all their POIs; includes names, expiration dates, and authorizer names
## POI ID Card Eligibility

<table>
<thead>
<tr>
<th>Category</th>
<th>Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overseer HMC Employee Retiree</td>
<td>Eligible for ID card</td>
</tr>
<tr>
<td>Spouse of Deceased Retiree</td>
<td></td>
</tr>
<tr>
<td>Retired Hospital Affiliate</td>
<td></td>
</tr>
<tr>
<td>Spouse of Deceased Hospital Affiliate</td>
<td></td>
</tr>
<tr>
<td>Incoming Employee*</td>
<td>Eligible for ID card *Card eligibility for Incoming Employee is not yet implemented</td>
</tr>
<tr>
<td>Field Education Supervisor</td>
<td>Not eligible for ID card</td>
</tr>
<tr>
<td>Hospital Employee</td>
<td></td>
</tr>
<tr>
<td>Inter-Affiliated Staff</td>
<td></td>
</tr>
<tr>
<td>Guest</td>
<td></td>
</tr>
<tr>
<td>Consultant</td>
<td>Eligible for temporary ID card</td>
</tr>
<tr>
<td>Family Member</td>
<td></td>
</tr>
<tr>
<td>Tenant</td>
<td></td>
</tr>
<tr>
<td>Vendor</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>Academic Advisor</td>
<td>Not eligible now, but under discussion</td>
</tr>
<tr>
<td>Collaborator</td>
<td></td>
</tr>
<tr>
<td>Volunteer</td>
<td></td>
</tr>
<tr>
<td>Security</td>
<td>Security ID card</td>
</tr>
<tr>
<td>Smithsonian Employee</td>
<td>Smithsonian ID card</td>
</tr>
</tbody>
</table>
# POI Provisioning: What Do They Get?

<table>
<thead>
<tr>
<th>Retiree</th>
<th>Spouse of Deceased Retiree</th>
<th>Retired Hospital Affiliate</th>
<th>Spouse of Deceased Hospital Affiliate</th>
<th>Family Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>POIs in CA, HBS, HKS, HLS, HMS, SDM, and SPH</td>
<td>• HarvardKey</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>POIs in EAS</td>
<td>• HarvardKey</td>
<td>• University Directory</td>
<td></td>
<td></td>
</tr>
<tr>
<td>POIs in FAS</td>
<td>• HarvardKey</td>
<td>• University Directory</td>
<td>• Optional @g Google Account</td>
<td>• Optional O365</td>
</tr>
</tbody>
</table>

**Notes:** All POIs provide their HarvardKey login name when claiming. Incoming Employee POIs are provisioned like employees.
Want More Info?

Looking for all the details?  
http://iam.harvard.edu/resources/hr-resources

- Quick Guide to Creating a POI in MIDAS
- Quick Guide to POI Role Types
- MIDAS Release Notes (recent and prior releases)
- POI Authorized Affiliations Explained
- And this presentation: POI Town Hall

Need forms?  
http://iam.harvard.edu/resources/forms

- Request for POI Authorized Identity Request Form
- Request for MIDAS Access Form
Questions?

Visit iam.harvard.edu

Or contact directly:

Terry Connolly
Identity & Access Management
Contact for POIs and MIDAS
terry_connolly@harvard.edu
617-495-0480
Thank you!