



Quick Guide to Creating a Person of Interest (POI)

The following instructions describe the steps you'll need to take in order to create a Person of Interest (POI) record in the IAM Identity Registry. Before you create a new identity, first validate that the person you are assisting is not already in Harvard's identity registry. If the person does not already have a record, follow the steps below to enter pertinent data about the person, review the data you've entered, and create a new POI role. If the person already exists in the registry, simply add a new POI role to their record. See the end of this document for frequently asked questions — and if you need additional help, please email IThelp@harvard.edu.

Before You Begin

In order to create a POI role for an individual, you'll need to know that person's **first and last names**, **birth date**, **assigned School or unit**, **role**, **start/end dates** and optionally the last 4 digits of their SSN/ITIN. You'll also need a valid **authorizer's HUDID**. Please gather this info before you begin.

1. First Steps

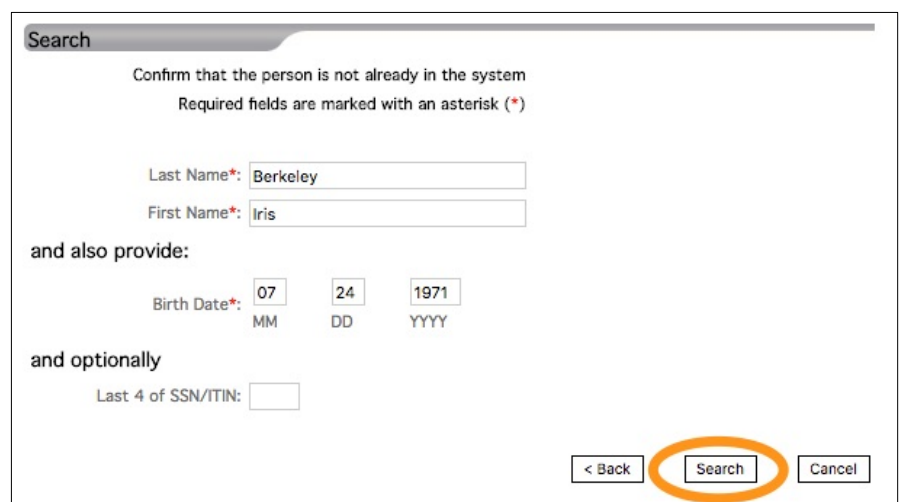
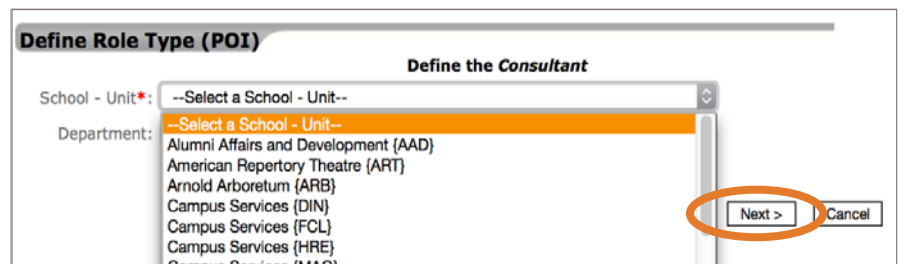
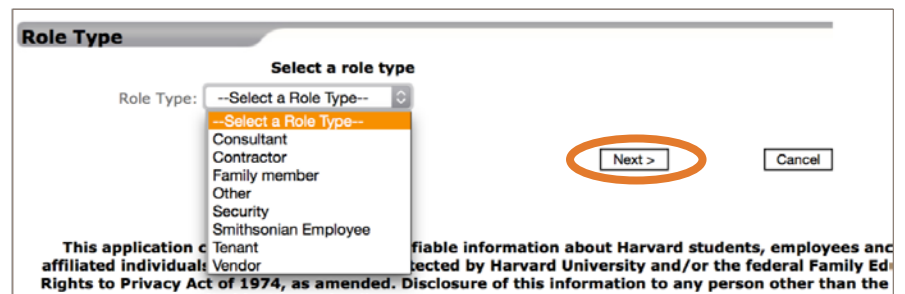
- First, log into MIDAS and choose your role type (usually *POI Basic Manager*).
- Then, select **Create Person** in the top menu bar.
- In the Select a Role Type screen, select the appropriate role type for your POI. It's important to choose a meaningful and descriptive role type; use "Other" only as a last resort, and note that if you choose "Other" you'll need to include a note later in this process describing the person's affiliation and need for a POI role. You can learn more about the different POI role types at <http://iam.harvard.edu/resources/quick-guide-poi-role-types>.
- When you are finished, click the **Next** button.

2. Select a School or Unit

- Select the appropriate **School - Unit** and, optionally, the **Department** from the drop-down menus.
- Please note that access to Harvard resources is tied to the School - Unit designation. For family members, select the Harvard partner or parent's School affiliation.
- When you are done, click the **Next** button.

3. Search for Duplicate Identities

- Verify that the person does not already exist in the registry by searching for possible matches. Enter the last name, first name, birth date and optionally, the last four digits of their SSN/ITIN, and click the **Search** button.



- If possible matches are found, MIDAS will list them and the **Match Rank** of each. An exact match is shown at the top and partial matches are displayed according to their Match Rank, low to high. The lower the ranking, the better possibility the identity listed is a match. See the “Match Rank Explained” section below.

- Select the HUID of each potential match listed, based on their match rank, to display the current profile of the identity.

- Carefully examine the current profile of the potential match to determine if the person’s identity already exists in the registry.

- If you determine that the potential match is indeed the same person you are intending to create, then do not create a new identity. Instead, simply update the existing identity by selecting **Add > Role** from the left menu on the current profile page. See the FAQs at the end of this guide for more information.

- If you determine that the potential match it is not the person you are intending to create, then select the “**Back to Results**” link at the top or bottom of the current profile page to get back to the list of potential matches.

- If you determine that none of the possible matches listed are the person you are intending to create, then proceed to create a new identity by selecting the **Create a different person** link. Proceed to Step 4.

- If your search finds no possible matches, then you are presented with the person information you entered. Check to make sure all the information is correct. If it is correct, click the **OK** button to create a new identity in the registry for this person. Proceed to Step 4.

Results for First name: Iris; Last name: Berkeley; Birth date: 1971-07-24;

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FERPA	HUID	Official Name	Listing Name	Birthday	Match Rank
	51340116	Berkeley, Irie Class Participant - Harvard College		24-Jul	5
	31340128	Berkeley, Ashley Contractor - Faculty of Arts and Sciences		24-Jul	6
	51340221	Johnson, Iris Student - Graduate School of Business Administration		24-Jul	7
	61340106	Berkeley, Irishan Collaborator - Alumni Affairs and Development		21-Jul	16
	81340110	Berkeley, Iristine Widener Special Borrower - Special Borrower		04-Aug	16

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Select HUID to examine the current profile

Refine search New search

Create a different person

Refine search New search

A person was not found which matches the criteria entered. Select OK to create a new person with this information, or select Cancel to exit without creating the new person record. Additional person data can be entered after selecting OK.

Name:Iris Berkeley
Birth Date:1971-07-24
Last 4 SSN/ITIN:

OK Cancel

Match Rank Explained:

- Only the first three characters of the first name are used in the match-rank calculation. For example, if the MIDAS user enters “Samantha”, then the search will consider Samantha, Sam, Sammy and Samuel to be a first name match in the calculation of the match-rank number.
- **Exact:** An exact match-rank is when all of the person’s information entered matched an identity in the registry; including the first name (first 3 characters), last name, birth date, *and* last four digits of their SSN/ITIN.

Note: If SSN/ITIN was not entered and everything else matched exactly, then the match-rank number is calculated as 5. This is the most common case.

- **Match Rank 1 through 7:** A strong possible match where the person’s information entered matched on the first name (first 3 characters) and/or last name; also matched on the birth date; and the last four digits of SSN/ITIN either matched, was not entered, or does not exist in the registry for the possible match listed.

- **Match Rank 8 through 12:** A possible match where the person’s information entered matched on the first name (first 3 characters) and/or last name; and also matched on the last four digits of the SSN/ITIN entered; but did not match on the birth date.
- **Match Rank 13 through 16:** A weaker possible match where the person’s information entered matched on the first name (first 3 characters); and also matched on the birth date; but *did not* match on the last four digits of the SSN/ITIN entered. If the last name matched then the ranking will be higher in this category.

OR

The person’s information entered matched on the first name (first 3 characters) *and* last name; but did not match on the birth date; and the last four digits of the SSN/ITIN was not entered.

- **No Matches Found:** The search will not find any potential matches when *both* the first name (first 3 characters) and the last name of the person’s information entered does not match any identities in the registry, even though the birth date and last four digits of the SSN/ITIN (if entered) may match identities in the registry.

OR

When *only one* element of the person’s information entered (first 3 characters of the first name, last name, birth date, or last 4 digits of SSN/ITIN) matches identities in the registry.

4. Create the New Identity

- Fill in as many of the person details as possible. Note that MIDAS automatically generates and inserts a Harvard ID (**HUID**) in this screen.
- Be sure to enter an **Onboard Email Address** so that this POI will be able to claim a HarvardKey.
- When you are finished, click the **Next** button.
- The person’s last name, first name, birth date and optional last 4 digits of their SSN/ITIN will be prepopulated from the information you entered earlier. If you need to change this information, cancel the creation process and start again from the beginning.

Important: If you cancel the create person process at this point you will be generating a duplicate HUID. Please email iam_help@harvard.edu stating that a duplicate ID was generated in error, and include the incorrect HUID. If you did not take note of the HUID then please provide the last name, first name, and birthdate used to create the incorrect identity, as well as the date when it was created.

- Fill in as many of the POI role details as possible, and authorize the POI creation by entering their **Authorizer’s HUID**.
- If an **Authorizer Administrator** is involved, enter their HUID as well.
- Fill in the POI role **Start and End Dates**. The start date is prepopulated to today’s date, and the end date is prepopulated to one year from today, but both can be changed.
- If you know the person’s address or phone number, click **Add Contact Data**. Add all known contact data to create the most complete identity record. Otherwise, click **Next** and skip to Step 5.

Person Details
Complete some more information about *Iris Berkeley*
Required fields are marked with an asterisk (*)

HUID*: 21340111
Last Name*: Berkeley
First Name*: Iris
Middle Name: Claire
Prefix: Ms
Suffix:
Birth Date*: 1971-07-24 (YYYY-MM-DD)
Last 4 of SSN/ITIN:
Gender: Male Female Unknown
Onboard Email Address: irisclaireberkeley@gmail.com
Official Email Address: Iris_berkeley@harvard.edu

Next > Cancel

POI Role
Complete *Consultant - Harvard University Press* details for *Iris Berkeley*
Required fields are marked with an asterisk (*)

Company: Acme Consulting Company
ID Line 1*: Consultant
ID Line 2:
Authorizer's HUID*: ██████████
Authorizer Admin's HUID:
Start Date*: 09/18/2015 (MM/DD/YYYY)
End Date*: 09/18/2016 (MM/DD/YYYY)
Comments:

< Back Add Contact Data Next > Cancel

- Fill in the address data. Office data is preferred, especially if the person will be located on campus. When entering address data on this screen you must include values for **Category** (residence, office, etc.), **Street Address**, **City**, **State/Province**, **Postal Code** and **Country**. Selecting a value for **Address Mail Realm** is optional, but helps create appropriate mailing distributions.
- If you don't know the person's address then leave the category blank.

- If you know any phone or fax numbers for the person, click **Add Phone**; otherwise, click **Next** and skip to Step 5.
- Fill in the phone data. The phone number listed under **Office Phone** may be for any preferred phone (i.e. office desk phone or cell phone), but it must also be assigned a **Location**. To assign a location, click **Set**, and then search and select their office address.

Note that the phone number supplied will be used in University directory listings and display on Harvard Phone consoles. Directory listing title and status may also be assigned from this screen. When you are done, click the **Next** button.

Address

If known, complete address details for *Iris Berkeley*
Required fields are marked with an asterisk (*)

Category*: Office address

Address Mail Realm: University Mail

Address*: 8 Story Street

Sixth Floor

City*: Cambridge

State/Province*: Massachusetts

Postal Code*: 02138

Country*: United States

Directory Listing

If Known, complete Phone/Fax details for *Iris Berkeley*
Required fields are marked with an asterisk (*)

Office Phone*: 617-495-7777 Ext:

Location*: 8 Story St.

Location ID:

Office Fax:

Listing Title: Adj Prof

Listing Status: --Select A Listing Status--

5. Review the Record

- MIDAS will present a screen displaying all the data that you have entered. Please review the information carefully.
- If you find any mistakes, click **Back** to go back and correct them. If the data displayed is all correct click the **Finish** button.
- Creation of the POI role is now complete. MIDAS will save the new identity and display its Detailed View. From this profile view, you may make changes to existing data or add new data to the identity.

Please review the information and click the Finish button to save the additional person details and role data.

Person Detail

HUID*: 21340111

Last Name*: Berkeley

First Name*: Iris

Middle Name*: Claire

Prefix: Ms

Suffix:

Birth Date*: 1971-07-24 (YYYY-MM-DD)

Last 4 of SSN/ITIN:

Gender: Unknown

Onboard Email Address: irisclaireberkeley@gmail.com

Official Email Address: iris_berkeley@harvard.edu

POI Role

Title: Consultant

Type: Consultant

School - Unit: HUP - Harvard University Press

Department:

Company: Acme Consulting Company

ID Line 1: Consultant

ID Line 2:

Authorizer's HUID*: [REDACTED]

Authorizer Name: [REDACTED]

Authorizer Admin's HUID:

Administrator Name:

Start Date*: 2015-09-18 (YYYY-MM-DD)

End Date*: 2016-09-18 (YYYY-MM-DD)

Comments:

A confirmation email will be sent to the Authorizer and the Authorizer's Administrator listed above.

Address

Category*: Office address

Address*: 8 Story Dtreet

Sixth Floor

City*: Cambridge

State / Province: MA

Postal Code: 02138

Country*: United States

Directory Listing

Office Phone*: 6174957777 Ext:

Location*: 8 Story St.

Location ID:

Office Fax:

Listing Title: Adj Prof

Listing Status:

Frequently Asked Questions

Why is it important to confirm that an identity does not already exist in MIDAS?

There are more than a million identities in Harvard's registry. When an identity already exists in the registry, making changes to that record rather than creating a new one stays true to Harvard's "one identity for life" paradigm and makes it possible for that person to keep the same Harvard ID (HUID) through their entire Harvard lifecycle — meaning a consistent experience with access to buildings and parking, authentication systems, and other systems at Harvard that require authentication, including Crimson Cash and other card-associated services.

The person I am assisting already has a HUID. Should I use it, or create a new record?

Do not create a new record. Instead, you should add a POI role to the existing HUID.

MIDAS says a field is required, but I do not have that data. How do I finish creating a record?

The creation of a record cannot be completed without the required data. However, you can cancel the process and start over once you have the necessary data available.

Can I still create a record if I don't have the person's address or phone number?

Yes. A person's address or phone number is not required to complete the creation of a record; however, it is recommended to add this information to a person's record once it is known, because it helps other MIDAS users in the future contact the person if necessary. Additionally, if you do not enter an address for a person, it will display as blank in online directories and on Harvard Phone consoles.

Can I still create a record if I don't have the person's email address?

Yes, but an Onboard Email is required for him or her to claim a HarvardKey, which must be done in order to access Harvard systems.

The person I am assisting does not yet have a Harvard email. Should I use their personal one?

Yes. There is no requirement that an email address be at a Harvard domain, and it can also be changed at any point in the future.

What data do I need to know about the person to complete a POI record?

In order to complete the creation of a POI record, you will need the following information:

- First name
- Last name
- Birthdate
- Start date
- Last four digits of Social Security Number is optional
- Role type
- Authorizer HUID (required for most role types)
- School or unit
- End date

What if I find that my person already has a POI role?

If a person already has a POI role, you may be able to modify the existing role rather than creating an additional one. If his or her existing POI role is extremely similar to the one you are trying to create (i.e. has the same role in the same School or unit), review the role end date and the authorizer, and make the necessary edits:

- If the role is still current (the existing role term includes today), simply extend the end date
- If the role has expired, add a new POI role
- If the role is requested by a different authorizer, add a new POI role
- If an authorizer associated with the existing role is no longer affiliated with the unit, edit the authorizer field of the existing role rather than adding a new one

MIDAS says that the Authorizer ID is invalid. What do I do now?

You will need to find someone else within the school or unit to act as the POI authorizer. The authorizer can be held accountable as to how the individual with the POI role uses Harvard resources. To be an Authorizer an individual must meet the following requirements:

- Be a current Harvard employee with an active employment status (A, L, P, S)
- Have an official email address recorded in the Harvard identity registry
- Be either junior or senior faculty, or a paid employee in one of the following categories:
 - A: Admin & Professional
 - O: Other Faculty

Important: Those who do not qualify as valid POI authorizers should not use a colleague or supervisor's HUID to authorize a POI role in MIDAS without that person's explicit permission. IAM notifies authorizers via email when they are assigned, when any of the POI roles they authorize are updated, and on a quarterly basis, a list of all the roles they authorize and when the roles will expire.

MIDAS says that the Authorizer Admin ID is invalid. What do I do now?

You can find someone else to act as a POI authorizer administrator, or they can be added at a later date since it is optional. This is someone who can administer the POI role on the authorizer's behalf. To be an authorizer administrator, an individual must meet the following requirements:

- Be a current Harvard employee with an active employment status (A, L, P, S)
- Have an official email address recorded in the Harvard identity registry
- Be either junior or senior faculty, or a paid employee in one of the following categories:
 - A: Admin & Professional
 - N: External Post Docs NHR
 - G: Graduate Student
 - O: Other Faculty
 - I: TAs, Other Staff
 - Y: Internal Post Docs
 - S: Support Staff
 - Z: External Post Docs Harvard Research

Important: Those who do not qualify as valid POI authorizer administrator should not use a colleague or supervisor's HUID without that person's explicit permission. IAM copies authorizer administrators on email notifications sent to the authorizer, and on a quarterly basis, a list of all the roles they administer along with their authorizers and when the roles will expire.

What should I do if I discover that a duplicate record has been created for a POI?

Please contact the HUIT Identity & Access Management program team at IThep@harvard.edu with as much information as you know regarding the duplicate.