Business Process – Granting or Removing Access for Department Administrators

**Purpose:** A business process for granting or removing a department* administrator’s access to sponsored systems ensures that an administrator receives pertinent information (via listservs, calendar invitations, etc.) and is able to manage their sponsored projects. Additionally, when an administrator leaves their position, changing or removing their access to these systems reduces risk to the university.

**Considerations:**

1) The SPA staff assistant manages access/membership to the following:
   a. HMSRAML and Longwood RAD listservs
   b. NIH eRA Commons
   c. Ongoing department/OSP/SPA meeting invitations (via Outlook calendar)

2) The SPA staff assistant also manages SPA and department requests for GMAS access by sending such requests to the Longwood Operations Team.

**Standards of Service:** Access should be granted, modified, or removed as soon as possible after the SPA staff assistant has been notified by the SPA Portfolio Owner (PO) that a department administrator has joined or left HMS, or has changed their role or department within HMS.

**Process Steps for Granting Access to a New Department Administrator**

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<thead>
<tr>
<th>Step</th>
<th>Role</th>
<th>Task/Activity</th>
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</table>
| 1    | Dept.               | Notifies their SPA PO that a new research administrator has been hired, and includes the following information for the new administrator:  
  • Full name (as it appears in PeopleSoft)  
  • HUID  
  • Email address  
  • Role (e.g., grants manager) and/or responsibilities with respect to sponsored research  
  • If applicable, the individual's portfolio (PI assignments, or org assignments for departments with multiple orgs) |
| 2    | SPA PO              | Forwards the information to spa_award@hms.harvard.edu, making sure to identify the individual's department/org affiliation. (Where necessary, the SPA PO will also clarify the individual's role or duties to the SPA Staff Assistant, so the proper access can be granted.) |
| 3    | SPA Staff Assistant | Creates a new eRA Commons account for the administrator, or adds an HMS affiliation to their existing account. |
| 4    | SPA Staff Assistant | Adds the administrator’s email to the HMSRAML and RAD listservs. |
| 5    | SPA Staff Assistant | Adds the administrator to the calendar invitation for their department/OSP/SPA meetings. |
| 6    | SPA Staff Assistant | Requests GMAS access for the administrator using the form at https://form.jotform.com/51534696175160:  
  • Enters administrator’s name and HUID (can be looked up in GMAS)  
  • Selects “New” access  
  • Identifies administrator’s org(s)  
  • Selects security role per description given by dept./SPA PO  
  Once access has been granted, forwards notification to SPA PO. |
| 7    | SPA Staff Assistant | Adds the administrator to the Department Contact Master List, including making any changes to the PI portfolio assignments within that dept., then forwards the new master list to the identified contacts in FIG, OSP, OTD and other administrative offices, noting the addition. |
### Process Steps for Removing Access When a Department Administrator Leaves

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<thead>
<tr>
<th>Step</th>
<th>Role</th>
<th>Task/Activity</th>
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<tbody>
<tr>
<td>1</td>
<td>Dept.</td>
<td>Notifies their SPA PO that a research administrator will be leaving their dept. Includes the date of that administrator's last day in the dept. If the administrator is moving to another HMS department, identifies the new department.</td>
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<td>2</td>
<td>SPA PO</td>
<td>Forwards the information to SPA Staff Assistant.</td>
</tr>
<tr>
<td>3</td>
<td>SPA Staff Assistant</td>
<td>If applicable, sends email to departing administrator requesting that they transfer their GMAS portfolio to the grants managers who will be covering their PIs. Includes instructions for transferring a portfolio found at the end of this document.</td>
</tr>
<tr>
<td>4</td>
<td>SPA Staff Assistant</td>
<td>Unless the administrator is moving to another HMS department, removes the HMS affiliation on their eRA Commons account.</td>
</tr>
<tr>
<td>5</td>
<td>SPA Staff Assistant</td>
<td>Unless the administrator is moving to another HMS department, removes the administrator’s email from the HMSRAML and RAD listservs.</td>
</tr>
<tr>
<td>6</td>
<td>SPA Staff Assistant</td>
<td>Removes the administrator to the calendar invitation for their department/OSP/SPA meetings. (If moving to another HMS dept., adds them to that dept’s meeting invitation.)</td>
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</tbody>
</table>
| 7    | SPA Staff Assistant | Requests changes to the administrator’s GMAS access using the form at [https://form.jotform.com/51534696175160](https://form.jotform.com/51534696175160):  
  - Enters administrator’s name and HUID (can be looked up in GMAS)  
  - Selects “Remove” access  
  Once access has been removed, forwards notification to SPA PO. (If the administrator is moving to another HMS dept., follows steps above to grant access for the new org and/or role, after receiving confirmation from the new dept.) |
| 8    | SPA Staff Assistant | Removes the administrator from the Department Contact Master List, including making any changes to the PI portfolio assignments within that dept. (If the administrator is moving to another HMS dept., follows steps above to add the administrator to the new org on the master list.)  
Forwards the new master list to the identified contacts in FIG, OSP, OTD and other administrative offices, noting the removal. |

*The term “department” is used here to refer to any school unit and includes divisions, centers, institutes, programs, and the like.*

See next page for step-by-step instructions for transferring your portfolio to a new portfolio owner.
Transferring Projects from your Portfolio to a New Portfolio Owner

Step 1: Click on Portfolio from GMAS home page.
Step 2: Select Reassign Project roles

This screen lists all pending and active project segments on which this user plays a role. You may also search for a role on this screen to view project segments by status.

To reassign any of this person’s role assignments on a segment, select “Reassign project roles” to reassign segments and designate to whom you wish to transfer the assignments.

Search for

Select all

Step 3: Look up new portfolio owner’s name under “Reassign to” and select appropriate profile.

Reassign project roles

Enter name of GMAS user to reassign roles to, choose segments to be transferred to, and then select OK.

Select all

Step 4: Click on Role to see all projects in order of specific role (i.e. Additional Action Memo Recipient).

Select all checkboxes of projects to be transferred to that individual and click at the bottom of the screen.

OK