GETTING STARTED: BWH PATHOLOGY CORES (DF/HCC) IN THE MGB CORE MANAGEMENT SYSTEM

If you already have an account to access to the MGB Core Management System; you can login at https://researchcores.partners.org/ and skip Section I.

I. SIGNUP TO ACCESS THE CORE MANAGEMENT SYSTEM

First Time User <u>with</u> an MGB User ID [e.g., BWH, MGH, MEEI, McLean, Schepens, Spaulding]:
1. Go to MGB Research Core Facilities at https://researchcores.partners.org/ and click on **Signup** in the top right corner.
2. Enter your MGB user ID and select "Lookup Information"
3. Review/Update user information. IMPORTANT: please verify your email address is correct. This will be the address that receive all notifications and invoices.
4. Select "Create Account"
5. Your MGB user ID will be used as your username to access the system

First Time User <u>without</u> an MGB User ID [e.g., BCH, BIDMC, DFCI, HMS, HSPH, other academic institutions, and for-profit organizations]:
1. Go to MGB Research Core Facilities at https://researchcores.partners.org/ and click on **Signup** in the top right corner.
2. Select "Don't have a Mass General Brigham ID?"
3. Complete the requested information
4. Select "Create Account"
5. Your e-mail address will be used as your username to access the system

II. ENTER PAYMENT TYPE / ADD NEW FUND

Prior to placing your first service request, Users must enter information for at least one fund number or payment type. This information will be linked to an individual's username and available each time a service request is placed. Users can have both "MGB" or "Non-MGB" payment types, multiple funds, and multiple PO #'s linked to their username.
1. Go to MGB Research Core Facilities at https://researchcores.partners.org/ and click on **Login** in the top right corner to view your **Dashboard**.
2. Click on **User** in the top menu bar and select **Funds**
3. Click on **+ New Fund** in the top right corner of the screen
4. Select "**MGB**" or "**Non-MGB**" from the "Payment Type" dropdown menu

   <u>**MGB**</u>**- A customer paying with a 9-digit MGB research fund # [e.g., BWH, MGH, MEEI, McLean, Schepens, or Spaulding].** Service requests where a 6-digit MGB research fund is used will be considered internal and the associated invoice will be paid by journal, no other action is required.
   1. Enter 9-digit MGB fund number and select "**Lookup** [*All MGB fund #s start with GR0, followed by 6 digit fund*]
   2. Review populated information to ensure you have selected the correct fund
   3. Select "Assign Fund"

Non-MGB- A customer paying by PO #, check, or credit card from a non-MGB institution [e.g., BCH, BIDMC, DFCI, HMS, HSPH, other academic institutions, and for-profit organizations]. Service requests where a PO #, check, or credit card is used will be considered external and the associated invoice will be paid by check or credit card. The external invoice will need to be sent to your grant manager to be processed for payment.

1. Select one of the payment options and complete the form.

    - Note: if you select PO Number, you can enter a PO # or a non-MGB research fund number in the PO # open text field. This will be displayed on the associated invoice for your accounts payable office's reference.

2. Enter the PI Name in the open field to see if they are already in the system. If not, click on **Enter new PI** to add.
3. Enter contact name, email and other information
4. Click on "Assign Fund"
5. Notification is sent to Core Administrator to review fund assignment, DF/HCC membership status and apply appropriate pricing tier.

ATTN DFCI CUSTOMERS:
Blanket DFCI PO is preferred, but we recognize that DFCI CRC service requests are not that simple.

Option #1: If payment is coming from funds at DFCI, you should follow the above instructions for Non-MGB Payment Type and select "PO Number". You can reference either a DFCI PO number or the appropriate 7-digit DFCI fund number. Please include the PI name so I can verify their DF/HCC membership status and bill at the reduced member rates. This will allow us to display either on the associated invoice. If the system requires you to enter an end date and you do not know when your fund ends, please enter 12/31/2099.

Option #2: If payment is coming from funds at BWH or MGH, you should select MGB Payment Type to enter a 9-digit MGB fund number. Associated invoices will be paid by journal, no other action is required.

III. INVOICE NOTIFICATION PREFERENCES

All invoices are sent to the User's email address. It is the User's responsibility to review and forward external invoices [Non-MGB User] to the appropriate person to be processed for payment. You can modify your notification preferences to add another email address to send invoices and invoice reminders to your appropriate billing contact.

1. Go to MGB Research Core Facilities at https://researchcores.partners.org/ and click on **Login** in the top right corner to view your **Dashboard**.
2. Click on **User** in the top menu bar and select **Notification Preferences**
3. In the **Copy To** field on the far right, for both Invoice and Invoice Reminder, please enter email address[es] for your Accounts Payable [AP], department administrator or department finance manager.
4. If you would like to discontinue sending the Statement of Charges to the PI, check the **No** radio button.

IV. SUBMIT A NEW SERVICE REQUEST

1. Go to MGB Research Core Facilities at https://researchcores.partners.org/ and click on **Login** in the top right corner to view your **Dashboard**.
2. From your **Dashboard** page, click on the BWH Pathology Cores (DF/HCC) in your **Cores I Use** list. If this is the first time using the BPC Cores, you should go to **Core Services** in the top banner and click on BWH Pathology Cores (DF/HCC) to access. After using the Core once, it will then automatically appear in your **Cores I Use** list going forward.
3. Click on **Service Requests** in the left margin. If you do not see menu options in the left margin, expand your window wider so it will appear. Or you can click on the `>` tab at the top, to the left of the Core name to open the menu.
4. Click on **+ New Service Request** on the right.
5. Fill out the service request form. [*All fields marked with an asterisk (*) are mandatory*]
   a. Project Name [*e.g., 12-345: Breast Cancer Study*]
   b. Return Shipping Requested [Select Yes, and then provide details if you are not local and need the Core to ship your materials to you. Otherwise, you can pick them up in person once the work is complete]
   c. **Core Services Requested**
      - Request this Order as a Rush: the default for this response in No. Please be aware that if you have prior approval and select Yes, a 50% surcharge will apply for all services on this order).
      - Select at least one Core service category
   d. **Sample Information**. Enter sample details and specific services needed for a sample and then click on `Add` button. Repeat until all samples have been entered] If you are entering a lot of samples, you can enter just the first sample here, and then upload the full list of samples using the BPC Sample List template [*coming soon*] available in the **Documents** in the left margin.
   e. **Additional information about the Project / Request**. Enter any additional details that you would like the Core staff to be aware of [*Do Not Enter Sample information here, this will delay your request*]
   f. **Documents**. Using the `Browse…` button, you can select and upload Documents from your desktop. [e.g., BPC Manifest, csv sample list, or other document[s] as needed]
   g. **Contact Information**. This is the person to contact for any questions regarding this service request
   h. **Funding & Billing Information.** Review Fund information, select an additional fund you have already created to split costs between, etc. [Do not click on New Fund to add one here, this feature is not currently working properly so you will just see a blank white box. You should follow the above instructions to **ENTER PAYMENT TYPE** starting with step #2 before creating a new service request].
6. Click on **Create** button. Your new service request will now appear in your list when you go back to **Service Requests** in the left margin.
7. Please print a copy of your Service Request form that shows your BPC service request # [e.g., BPC-24-LW-0001] to drop off at the Core along with your samples. If the Core is providing the tissue or you have no samples to drop-off, there is no need to print.
8. You will receive an automated email from SHLcorelab@bwh.harvard.edu once your service request is complete and ready for pickup.

V. VIEW, EDIT OR CANCEL AN EXISTING SERVICE REQUEST

Only service requests with a status of **Submitted** can be edited or canceled by a User. Once a service request status has advanced to **Active** or **Completed** , no further changes can be made.

1. Go to MGB Research Core Facilities at https://researchcores.partners.org/ and click on **Login** in the top right corner.
2. From your **Dashboard** page, click on the BWH Pathology Cores (DF/HCC) in your **Cores I Use** list.
3. Click on **Service Requests** in the left margin. If you do not see menu options in the left margin, expand your window wider so it will appear. Or you can click on the **>** tab at the top, to the left of the Core name to open the menu.
4. You should now be able to view all of your existing service requests by status.
5. To view an existing service request that has a status of **Submitted** , click on the **ID #, Project Name.**
6. To edit or cancel an existing service request that has a status of **Submitted** , click on the ▼ down arrow at the far right end of the row and select **Edit** or **Cancel**.
7. You can view [read-only] any to **Active** or **Completed** service request by clicking on the ▼ down arrow on the far right end of the row and select **Show**.

VI. GENERAL CORE INFORMATION

Hours of Operation
We are offering walk-in hours for Drop-Off and Pick-Up Monday-Thursday between 10am to 3:30pm; and Friday by appointment only (pre-approved by Donna at dmskinner@partners.org; or Teri at tbowman@mgb.org).

Location
Brigham and Women's Hospital
20 Shattuck Street, Thorn, 604, 603b
Boston, MA 02115

Contacts
- Technical Questions: Teri Bowman, Core Manager at tbowman@mgb.org.
- Customer Account Management & Billing Questions: Lauri Wyner, DF/HCC Research Cores Director of Administration at lauri_wyner@hms.harvard.edu