Use the following procedures to access core facilities at institutions affiliated with the Open Access Initiative.

Step 1: Contact the director or manager of the facility to ask whether the facility is available for use by external customers.

Step 2: If the facility is available, then ask whether the specific instrument or service is available and how to sign up for its use.

Step 3: Before signing up, explain whether you intend to mail data or materials to the facility. If you do, then be sure to clarify with your Principle Investigator whether intellectual property is involved. If there is, then contact your Office for Sponsored Research or Technology Transfer Office to determine whether a confidentiality agreement is needed before proceeding.

Step 4: Before signing up, explain whether you intend to visit the facility to either perform or observe the testing of samples. If you do, then you will be required to provide a Certificate of Insurance or Waiver of Liability before visiting campus.

Step 5: If you plan to use instruments, then ask whether there is training or certification required to use the instruments. Training may involve a fee.

Step 6: When signing up, please identify your method of payment. The most common method is a Purchase Order from you home institution.
(a) To create a PO at your institution, you will need the name of a contact person (manager or business administrator) and billing address of the facility you plan to use

(b) To set up a blanket PO at your institution, you will need to obtain an invoice from the facility business manager.

(c) **To create a user account at the facility, you will need to provide the following information to the facility manager:**

- Your name and contact information (email and phone number)
- Your billing address (including street address, department, school and institution)
- Purchase order number (from your institution)
- Name of your principal investigator (including department, school and institution)
- Name and contact info for the account administrator who will manage the PO (email and phone number)

The following are items that will NOT be required from the core facility:

- Completed vendor form (core facilities are not vendors)
- Pre-spending invoice (only actual use of the facility will be invoiced)