



STRIDES Initiative Enrollment Guide

National Institutes of Health (NIH)





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1.0 STRIDES Enrollment Guide

For Extramural Institutes Using NIH Funding for Amazon Web Services

1.1 INTRODUCTION

The purpose of this document is to introduce extramural research institutions to the Science and Technology Research Infrastructure for Discovery, Experimentation, and Sustainability (STRIDES) Cloud access initiative and describe how research institutions and their researchers can gain access to the initiative. Points of contact at STRIDES and Four Points Technology (STRIDES' selected AWS provider) who can assist with onboarding and answer any questions are also included.

This document focuses on the information needed by Institutions and their Offices of Sponsored Research, Offices of Information Technology, and Finance Offices to onboard with STRIDES.

1.2 STRIDES

The STRIDES Initiative is one of many efforts across the National Institutes of Health to implement the NIH Strategic Plan for Data Science. The purpose of STRIDES is to enhance biomedical discovery and improve efficiency through new digital data management strategies. STRIDES is working to develop a robust, interconnected, federated data ecosystem that breaks down silos related to generating, analyzing, and sharing research data. Benefits of using the STRIDES Initiative as a vehicle to access Amazon Web Services include:

- STRIDES provides a mechanism for enhanced sharing and integration of data among diverse biomedical research programs
- Discounts on STRIDES Initiative partner services—Favorable pricing on computing, storage, support, and related cloud services for NIH Institutes, Centers, and Offices (ICOs) and NIH-funded institutions.
- Access to AWS Enterprise Support through STRIDES
- STRIDES consolidated Data Egress Waiver
- Professional services—Access to professional service consultations and technical support from the STRIDES Initiative partners.
- Training—Access to training for researchers, data owners, and others to help ensure optimal use of available tools and technologies.

1.3 STRIDES AMAZON WEB SERVICES OFFERING

In September 2018, NIH issued a multi-year award to Four Points Technology to provide AWS to STRIDES participants both intramurally and extramurally.

Four Points is a Service-Disabled Veteran Owned Small Business. Over the last seven years, Four Points has built a practice around working collaboratively with Amazon Web Services and delivering AWS in highly regulated and controlled environments.



In addition to providing users with maximum control over their own AWS environments, Four Points supports rapid AWS adoption by providing operational support for account creation, account migration, billing, usage reporting, alerting, and problem resolution.

Amazon Web Services is committed to the effective utilization of the AWS Cloud by biomedical researchers and sees STRIDES as a key initiative for accelerating Cloud adoption and collaboration.

AWS is therefore committing significant resources to support the biomedical research community. These resources are available through STRIDES for the benefit of a broad range of initiatives.

STRIDES provides access to the full scope of AWS services including:

- All cloud capacity services (including new services as they are released by AWS) at a standard discount rate
- AWS Enterprise support at no additional cost
- AWS Marketplace including key products available at discounted rates
- AWS Professional Services
- AWS Training

Additionally, Four Points can support you with access to third party tools and services.

1.4 STRIDES OPERATING PHILOSOPHY

STRIDES focuses on encouraging collaboration and Cloud adoption without interfering with extramural researchers' decision making and control over their accounts. STRIDES encourages users to:

- Implement best practices for following FAIR (findable, accessible, interoperable, reusable) guidance principles for data stewardship; and
- Comply with NIH information security policy to protect sensitive data.

In the typical STRIDES model, extramural researchers retain full control of their operating accounts. These accounts are linked to a STRIDES master payer account so that all extramural researchers can take advantage of volume discounting and so that STRIDES can track overall Cloud adoption by extramural researchers.

1.5 STRIDES ONBOARDING

Use of the STRIDES initiative is highly recommended for NIH-funded researchers utilizing the AWS Cloud. STRIDES is open to virtually all research institutions receiving NIH funding via both grants and contracts.

Under STRIDES award with Four Points, extramural researchers are identified as "Designated Recipients." Designated Recipients are defined as "NIH-funded entities, including holders of NIH contracts, other transaction agreements, grants, cooperative agreements, and other agreements."



Taking advantage of STRIDES discounted AWS pricing and other benefits is relatively easy. Researchers with active NIH grants can pay for cloud services (receiving the discounted rate) directly from their award funds.

The process begins with admitting the Research Institution (Enrollment). This is generally associated with an initial project that wants to leverage STRIDES (Provisioning).

The basic steps (described in more detail in process flow chart below as appropriate) are:

- Review this Onboarding package
- Determine if a Business Associate Agreement (BAA) is required. (This is a decision made at the Institutional level based on the projects that will be associated with STRIDES.)
- Determine Funding Source (this may vary project by project)
- Onboarding and account creation/transfer
- Ongoing operations support and training

1.6 REVIEW THE ONBOARDING PACKAGE

Four Points needs some basic information to verify your eligibility and establish points of contact for onboarding. <https://www.4points.com/nih-strides-initiative/>

1.7 DETERMINE IF A BAA IS REQUIRED

If your Institution's project involves the storage or processing of Protected Health Information "PHI" data, a Business Associate Agreement (BAA) establishes commitments and responsibilities for protecting the data.

For ongoing projects, a BAA is often already in place. If a BAA is already in place, a new BAA is not required.

Alternatively, awardees and their institutions can execute a BAA agreement directly with AWS using a simple on-line template that AWS provides.

If you have an existing AWS Account, you can access the AWS BAA through: <https://aws.amazon.com/artifact/>

Alternatively, Four Points can provide you with a copy to review. AWS treats this as a proprietary document and an NDA agreement with Four Points is required for this approach. You can request a copy of Four Points' standard NDA.

Four Points will provide the AWS BAA on completion of the NDA.

If the researcher or their institution is processing PHI data but cannot accept the standard AWS BAA, Four Points Technology will work with the researcher to develop a solution.

1.8 ACCOUNT CREATION & TRANSFER

STRIDES supports both new AWS accounts and the transfer of existing accounts to the STRIDES initiative. New accounts are setup by Four Points and turned over to the extramural researcher as soon as agreements are in place.



Typically, to on-board an existing research account to STRIDES, the researcher would:

- Re-name their account to a standard format used by STRIDES to track adoptions
- Link their account to the STRIDES master payer account (via transfer for existing accounts managed by other resellers or via a linking request for new or independent accounts.)

Account transfers are accomplished via a three-party document executed between AWS, the entity currently responsible for payments to AWS for account usage, and Four Points (as the entity accepting responsibility to AWS for payment going forward).

For Institutions with existing AWS environments that are centrally managed by the Institution via AWS Organizations or a similar tool, Four Points can, with the approval of STRIDES, provide the Institution with a dedicated AWS Consolidated Billing/Master Account which can control all linked accounts funded by STRIDES. Four Points recommends an early discussion between Four Points, STRIDES, and the organization within your Institution responsible for Cloud governance and control.

For a detailed description of the Account Transfer process, see:

<https://www.4points.com/downloads/Account-Transfer-Process-Document.pdf>

1.9 STRIDES POINTS OF CONTACT

In support of STRIDES, teams at NIH, Four Points, and AWS work together closely to make the initiative valuable and easy to use for extramural researchers.

Points of contact at NIH, Four Points, and AWS are provided in Attachment 1.

Please use Four Points as your initial point of entry. Four Points is focused on operational support – onboarding, account setup and transfer, billing and reporting.

NIH is the best source for information about the overall STRIDES initiative and its goals and objectives.

AWS is supporting the initiative with resources from both their Federal and Higher Education teams providing subject matter expertise and technical guidance.

Attachment 1. Points of Contact

Please reference below for POC details.

ATTACHMENT 1. POINTS OF CONTACT

NAME	TITLE	EMAIL	PHONE
FOUR POINTS AGREEMENT AND ON-BOARDING			
Nasim Khan	Program Manager	Nkhan@4Points.com	571-353-7250
Laurie Lucas	NIH Account Executive	LLucas@4Points.com	571-353-7243
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NIH STRIDES			
R. Todd Reilly, PhD	CIT Cloud Services / STRIDES Initiative	Todd.Reilly@nih.gov	301-435-9221
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AMAZON WEB SERVICES (AWS - CLOUD SUBJECT MATTER EXPERTS)			
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