

## Get started as a YCR external user

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### For full-services (YCR staff perform experiments)

1. **Contact** Jianfeng Lin ([Jianfeng.lin@yale.edu](mailto:Jianfeng.lin@yale.edu)) to discuss which YCR services best match your needs. A zoom meeting with Jianfeng and the YCR team can be arranged if needed to discuss the services and outline the next steps.
2. **Set up a PPMS account:** Complete the PPMS External Customer Shortform at <https://ppms.us/yale/vdoc/?cont=on&pf=38&docid=58> to register through the HOB system. Once approved, you will be added as an external user in PPMS and receive log in information.
3. **Sign a contract with Yale to use YCR service:** you will receive **(a)** the “[Yale CryoEM Resource Customer Agreement](#)”, and **(b)** the “[YCR Policies](#)” from Jianfeng, as well as a link for “[Core Facility Registration Form](#)” from the Hyland OnBase (HOB) system.
  - (1) **Review and sign** the Customer Agreement and send it back to Jianfeng for Yale’s signature. You will receive the countersigned contract file from Yale.
  - (2) **Fill out and submit** the “[Core Facility Registration Form](#)”.
  - (3) **Review the “YCR Policies”** to know better about how to use YCR services.
4. **Reserve YCR services:** After Yale Environmental Health & Safety (EHS) approves your “[Core Facility Registration Form](#)”, you may then reserve YCR services in PPMS (<https://ppms.us/yale/login/?pf=1>) in accordance with the “[YCR Policies](#)”, following the steps below:
  - (1) **Login into the PPMS** to get information about the availability of the instrument that you need.
  - (2) **Fill out and send the service request form** (provided by Jianfeng) to him and the Site Director of the YCR site where you will be working. Jianfeng or the Site Director will arrange the service and inform you of the details.
5. **Receive YCR services:** Jianfeng or another YCR staff member will provide information on instrument locations and the shipping address. Ship or deliver your samples to YCR as needed

## For training, self-services, or partial-services (users perform all or some experiments)

1. **Contact** Jianfeng Lin ([Jianfeng.lin@yale.edu](mailto:Jianfeng.lin@yale.edu)) to discuss which YCR services best match your needs. A zoom meeting with Jianfeng and the YCR team can be arranged if needed to discuss the services and outline the next steps.
2. **Set up a PPMS account:** Complete the PPMS External Customer Shortform at <https://ppms.us/yale/vdoc/?cont=on&pf=38&docid=58> to register through the HOB system. Once approved, you will be added as an external user in PPMS and receive log in information.
3. **Sign a contract with Yale to use YCR service:** you will receive **(a)** the “Yale CryoEM Resource Customer Agreement”, and **(b)** the “YCR Policies” from Jianfeng, as well as a link for “Core Facility Registration Form” from the Hyland OnBase (HOB) system.
  - (1) **Review and sign** the Customer Agreement and send it back to Jianfeng for Yale’s signature. You will receive the countersigned contract file from Yale.
  - (2) **Fill out and submit** the “Core Facility Registration Form”.
  - (3) **Review the “YCR Policies”** to know better about how to use YCR services.
4. **Prepare for working at Yale:**
  - (1) **Provide information for each person who will work at YCR.** Jianfeng will contact you to request the necessary details. With this information, Yale will issue a NetID and share the account details with each user.
  - (2) **Complete the safety training** listed below and send the completion certificates to Jianfeng. Proof of equivalent training from your home institution or company may also be accepted.
    - *Laboratory Chemical Safety training* (<https://ehs.yale.edu/trainings/laboratory-chemical-training>).
    - *Biosafety training* (<https://ehs.yale.edu/trainings/biological-safety-training-part-1> and <https://ehs.yale.edu/trainings/biological-safety-training-part-ii>).
    - Users who perform **negative staining** must also have completed the trainings of *Radiation Safety for Unsealed Sources* (both part I and II, <https://ehs.yale.edu/trainings/radiation-safety-basic-concepts>).
  - (3) **Get a Yale badge:** You will receive an email from Yale with instructions to obtain your badge.
5. **Reserve YCR services:** After Yale Environmental Health & Safety (EHS) approves your “Core Facility Registration Form”, you may then reserve YCR services in PPMS (<https://ppms.us/yale/login/?pf=1>) in accordance with the “YCR Policies”, following the steps below:
  - (1) **Login into the PPMS** to get information about the availability of the instrument that you need.
  - (2) **Fill out and send the service request form** (provided by Jianfeng) to him and the Site Director of the YCR site where you will be working. Jianfeng or the Site Director will arrange the service and inform you of the details.
6. **Receive YCR services:** Jianfeng or another YCR staff member will provide information on instrument location and the shipping address. Ship or deliver your samples to YCR as needed and conduct your work at Yale.