

# NET+ AWS Program Onboarding & Account Transfer Checklist

## Four Points Technology

### Program Overview:

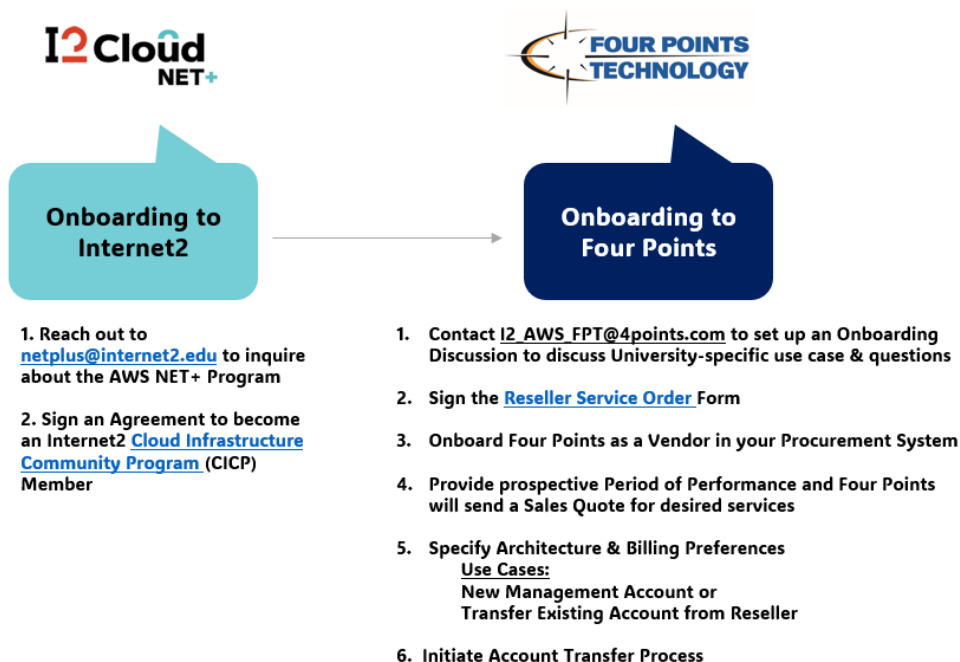
Thank you for your interest in the NET+ AWS contract and program utilizing Four Points Technology. The NET+ agreement is the product of a rigorous, community-driven, competitive bid process, and we are excited to make it available to the research and education community.

The NET+ AWS program was designed by the Internet2 members community with a number of differentiated benefits including:

- **A base discount rate of 4.5% with room to increase** by leveraging no-fee FinOps services.
- Full support for setting up and using the **NIH STRIDES** initiative **featuring a 12% discount**.
- A **Data Egress Fee Waiver** which refunds egress out to the internet charges **up to 15% of a management account's monthly spend**.
- **Optional technical support plans** directly through AWS
- **Unlimited number** of management accounts (formerly known as master payer accounts)
- **Customer control** of management account (formerly known as master payer account) root credentials
- **Programmatic access to billing data** for third-party integrations
- **800+ Gb/s of private peering** capacity to the Internet2 Network for member institutions.
- A framework for enterprise-scale consumption, including the option of **a single institutional bill** or **direct billing to account holders**, with a variety of payment options including credits.
- A **community advisory board** to drive continued benefits for all subscribers.
- An **active** facilitated **peer community** working together on best practices of adoption, use, and innovation with AWS.

### Onboarding Process:

The Onboarding Process to both Internet2 and Four Points includes two separate agreements in addition to a few administrative steps required for billing and account setup/transfer. The onboarding steps can be completed concurrently, and are described below:



*(Check when complete)*

**Internet2 agreement:**

The agreement between your organization and Internet2 recognizes the foundational community aspects of the program that we offer and supports the maintenance of the program. It's called the Cloud Infrastructure Community Program (CICP; formerly known as the Infrastructure and Platform Services (IPS) program). More information about the fees and value of the program can be found here: <https://internet2.edu/cloud/internet2-net-plus-services/net-plus-ips-annual-access-fees/>

For this program, you'll be signing a Participation Agreement and Participation Schedule. We've attached a [review copy of this PA+PS](#). Please let Internet2 know who your signatory is and they will forward a DocuSign version for execution.

If you have questions about the CICP PA+PS agreements or are ready to move forward, please contact the Internet2 team at [netplus@internet2.edu](mailto:netplus@internet2.edu).

*(Check when complete)*

**Reseller agreement:**

In addition to the agreement with Internet2, you will also sign a Reseller Order Form (RSO) with Four Points. Here is a link to [a review copy of the RSO](#).

If you have questions about the agreement or are ready to move forward, please contact the Four Points team at [I2\\_AWS\\_FPT@4points.com](mailto:I2_AWS_FPT@4points.com).

*(Check when complete)*

**Onboard Four Points as a Vendor in your Procurement System:**

A necessary step in the onboarding process is for your institution to establish Four Points as a vendor in your procurement system. This helps enable billing and payment once the contract is established.

*(Check when complete)*

**Provide Four Points Tax Exempt Certificate (if applicable):**

Please provide Four Points with your institution-specific tax-exempt certificate, if applicable.

*(Check when complete)*

**Receive Sales Quote from Four Points:**

Once your team has a desired period of performance, Four Points will provide a sales quote that will specify a cost estimate for desired service(s).

*(Check when complete)*

**Specify Architecture & Billing Preferences**

Four Points will meet with your team to discuss your current and desired account setup and billing preferences. Some sample questions that will be asked during this discussion are:

- What is your current account setup with your current reseller (i.e. dedicated management account, # of member account(s), etc.)?
- Do you have direct access to AWS Support or do you coordinate through your current reseller?
- Are you looking to transfer accounts (management and member) or establish new management account(s) with Four Points?
  - Do you have access to fully manage your organization, view billing details, or are you restricted?
- Are you interested in one or multiple purchase order(s) [POs]?
- Are you familiar with the STRIDES program/discounts?

☐ (Check when complete)

### **Management (formerly known as Payer) Account Transfer Process:**

Four Points and your current Reseller will do a Consent to Assign (CTA), which will officially transfer the payment responsibility to Four Points. It is Four Points' goal to get the CTA submitted to AWS by the 15<sup>th</sup> of the month so the billing transfer will be effective on the first of the next month. *Please note there is a period of time when both resellers have some presence in your organization as the billing information is in the process of being transferred.*

### **IMPORTANT NOTES**

1. Management Account Transfer must occur on the 1st of the month for billing cutover. Transfer steps will/can be completed before and after the effective date, but AWS cannot split the monthly invoice between two resellers.
2. There are two steps for the management account transfer.
  - a. Contractual document (Consent to Assign/CTA) executed between AWS, Four Points, and current reseller.
  - b. Operational – changes made to the management account to change billing and account information.

### **Check before you go –**

1. What does your current reseller consider proprietary/theirs?
  - a. Reserved Instance (RI)/Savings Plans (SP) Accounts – Will these be moved out of your organization? What impact will that have on your monthly bill?
  - b. Your access to both the management and member accounts – was this set up by your current reseller?
  - c. AWS generated billing and utilization reports – will these be deleted?
    - i. Detailed Billing Reports
    - ii. Cost Allocation Reports
    - iii. Cost and Usage Reports
    - iv. Saved Cost Explorer Reports
  - d. Service Control Policies/Roles/IAM
    - i. Get a full list of service control policies and permission-based policies and roles that were implemented by current reseller.
      1. Make a note of anything that you would like to be maintained/recreated.
      2. This will act as a guide to ensure that reseller restrictions are removed and that any desired policies are retained.
    - ii. IAM Access
      1. If your current reseller set up your IAM access, please get their agreement that they will not remove.
      2. Four Points will work directly with your current reseller on their removing access once current reseller has completed all billing under its contract with you.
2. Account Credentials
  - a. Do you own root credentials to and can you access all of your member accounts? If you do not, we will work with you on remediation.
    - i. Root Credentials consist of the email address associated with the account, password, and MFA.

- ii. All Four Points customers control their member account root credentials through email addresses owned by their organizations or via email forward leveraging @4points.com email addresses.

### **Account Transfer**

Contractual Requirement – Consent to Assign (CTA). **Four Points is required to submit the information detailed below** and will require you and/or your current reseller to provide the details for the highlighted lines.

AWS will generate a DocuSign using the below information to transfer billing responsibilities from one reseller to another. The DocuSign is executed between the two resellers and AWS. Customers are not required to sign. AWS's requires 3-10 business days from the time of CTA initiation request to generate and send the CTA. Full execution is dependent on signatories' responsiveness; however, this will be tracked by Four Points in order to meet customer's requested effective date.

#### **EFFECTIVE DATE:**

#### **ORIGINAL ACCOUNT OWNER (ASSIGNOR)**

**Full Legal Entity Name:**

**Full Mailing Address:**

**Point of Contact Name:**

**Signatory Name (for DocuSign):**

**Signatory Email Address:**

#### **NEW ACCOUNT OWNER (ASSIGNEE)**

Full Legal Entity Name: Four Points Technology LLC

Full Mailing Address: 13221 Woodland Park Rd, Suite 400 Hendon, VA 20171

Point of Contact Name: Joel Lipkin

Signatory Name (for DocuSign): Joel Lipkin

Signatory Email Address: [jlipkin@4points.com](mailto:jlipkin@4points.com)

1. Reason for Account Transfer:

2. Account Transfer type:

3. For resold accounts, who is the End Customer?

4. For resold accounts, which reseller program?

5. For the Distribution Program, who is the Distributor?

6. For the Distribution Program, who is the Distribution Seller?

**7. Are any accounts enabled for GovCloud? [Y or N]**

**8. Is a Payer or Management account part of this transfer?**

**9. If a Payer or Management account is part of this transfer are all Linked or Member accounts**

transferring?

**LIST OF ACCOUNTS:**


Operational Transfer

Once a CTA is in place Four Points will complete necessary onboarding steps and work with customer and other reseller to schedule an account transfer session.

The account transfer must take place after final invoices have posted for the last billing period under the previous reseller. Typically, this occurs the second week after the effective start date.

Transfer activities are limited to updating information within the management account.

- Email address\*
- Password\*
- MFA\*
- Contact Information\*
- Payment Information
- Tax Information
- Set up of billing reports.
- Set up of Four Points Cloud Team IAM Access
- Customer IAM Access – if desired
- Removal of previous resellers access

\*If customer is root credential holder this will not be updated.

(Check when complete)

**Member (Linked) Account Transfer Process:**

**IMPORTANT NOTES**

1. Member accounts transfers are not subject to cutover timeframes and can be performed at any time during the billing month. Billing cutover is immediate.
2. When transferring accounts from one management account to another its important to perform the unlinking and relinking steps immediately to prevent charges from being billed to the member account while its unlinked.
3. Historical utilization and spend data will not transfer to new management account, be sure to save down any reports you wish to retain.
4. Cost tags must be activated at the management account level and are not visible in the management account until the accounts are transferred. Please be sure to activate any cost tags that are in use once accounts are transferred or notify the Four Points cloud team so they can activate after the accounts are transferred.

**Check before you go –**

1. Service Control Policies/Roles/IAM

- a. Ensure that there is not a service control policy applied to prevent member accounts from leaving the Organization.
  - b. Ensure that the reseller you're leaving does not have access to your member accounts via IAM or role based access
2. Account Credentials
- a. Do you own root credentials to and can you access all of your member accounts? If you do not, we will work with you on remediation.
    - i. Root Credentials consist of the email address associated with the account, password, and MFA.
    - ii. All Four Points customers control their member account root credentials through email addresses owned by their organizations or via email forward leveraging @4points.com email addresses.

### Reseller Owned Member Accounts

If your member accounts leverage email addresses that belong to your reseller a CTA is required (see contractual requirement CTA)

- If changing from reseller to institution owned email address the CTA will be executed between your institution, the reseller your transferring away from and AWS
- If changing to Four Points email addresses accounts the CTA will be executed between Four Points, the reseller your transferring away from and AWS

Account email addresses will be updated as part of the account transfer process.

### End User Owned Member Accounts

If your member accounts leverage email addresses that belong to your institution only the operational transfer steps are required

### Operational Member Account Transfer

1. Accounts must have a valid payment method in order to leave a current Organization. Four Points will submit a request to AWS to update each account with Four Points payment details. We will require a full list of account IDs to submit the request. This typically takes 1-3 business days.
2. A linking request will be sent from a Four Points management account to each of the linked accounts that will be transferring
3. Once the linking request is received (an email will be sent to the email address on the member account) the root credential holder for each member account will need to log into the account and perform the following steps
  - a. Log into the account
  - b. Navigate to Organizations
  - c. Locate and click on the "Leave Organization" button
  - d. Confirm that you wish to leave
  - e. Refresh Organizations page – this will make the current invite to link to the Four Points Organization visible
  - f. Click on the "Join Organization" button
4. Your account will now show that you are part of the Four Points Organization, and the account transfer is complete.