

Guest & Visitor (G&V) Faculty Process

This process is required when there is salary and/or reimbursement to a University/Institution.

The approved G&V Form, Guest Appointment Letter and Statement of Work (SOW) are required prior to issuing the Purchase Requisition (PR).

G&V Form

- Approval tab – Fill in completely, include project/task number
- G&V Template tab: Include all costs
 - Guest appointment letter:
 - Required when there is salary and/or reimbursement to a University/Institution
 - Letter coordinates: email to guest; cc to Requestor, ppdfinancial@fnal.gov (PPD Finance), Department Admin, Division Admin and Visa office if a visa is required.

Email completed G&V form to ppdfinancial@fnal.gov

The Division Head will approve and forward to the Directorate to generate the Guest appointment letter. The Directorate will forward the letter to the Letter coordinates; the guest should accept with a cc to all. Once the letter is received the Department Admin will forward the G&V form to the Visa office if a Visa is required.

Statement of Work (SOW)

The SOW should be generated for a yearly time period and contain the scope of work and costs.

- Introduction
- Activities Planned
- Costs
- University/Institution contacts
- Approved By:
 - University/Institution guest
 - Funding Department Head
 - Division Head
 - Directorate

Purchase Requisition (PR)

The PR should be generated for a yearly term period based on the SOW term and contain the scope of work and costs.

- Attachments:
 - Appointment Letter
 - SOW
 - Sole Source if 10K or over (not required on Change Orders)
- Approved By:
 - Funding Department Head

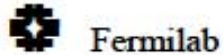
Memorandum of Understanding (MOU)

Not needed unless the Institution requires one. For Non-US Institutions, any MOU must be pre-arranged by DOE (through the COO's office).

To request the G&V form, send email to ppdfinancial@fnal.gov

To request sample templates, send email to steph@fnal.gov

Sample G&V Faculty - Approval Form Tab

APPROVAL/AUTHORIZATION FOR HIRING or APPOINTMENTS

Type of Request: G&V New Appointment MOUS
 G&V Extension to Appt. SOW'S
 Personnel Requisitions Requisition Attached / Needed

Guest Name / Institution:

J. Doe / Doe University

What work will this person do?

J. Doe will take on all required responsibilities of the Muon (g-2) Co-spokes-personship, as defined in the bylaws of the Muon (g-2) Collaboration.

Why are we offering this appointment?

Doe University is a full collaborating institution of the Muon (g-2) Collaboration.

What funding type supports this request?

40/40.59.03 IF g-2 G&V

Is it in the budget for funding type:

Yes

Directorate Approval: _____

Date: _____

PPD_ADMIN_026 Sample

Sample G&V Faculty – G&V Template Tab

PPD Guests and Visitors Request

Summary:		Dept Head Approval:		Name of Requester:		Steve Brice			
Guest Name/Institution/Type of Appc./Department	Proposed Start Date	Proposed End Date	Task #	Task Name	Department	% Distribution to Task	SWF	M&S	Total Request
J. Doel/ Doe University	1-Sep-2012	31-Aug-2013	4059-03	PPD G-2 Guests & Visitors	Intersity Frontier	100.0%	0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
Estimated Total							0.00	0.00	0.00

Details of Proposed Agreement:									
Type of Agreement	Days	Months	Amount per day	Amount per month	Single Occurrence Charge	Sum of SWF	Sum of M&S	Total	
Base Salary	365.0	12.0				0.00	0.00	0.00	
Reimbursement to University	365.0	12.0							
Car Rental	365.0	12.0							
Housing	365.0	12.0							
Per Diem	365.0	12.0							
Travel	365.0	12.0							
Other (Please Specify below)	365.0	12.0							
	365.0	12.0							
	365.0	12.0							
	365.0	12.0							
OP/IO Vac. Fringe	365.0	12.0				0.00	0.00	0.00	
Total	365.0	12.0				0.00	0.00	0.00	

If Guest appointment letter is required, please provide "coordinates" of where the guest will be staying. If the salary is not included in the request, please provide the salary rate. If the salary is not included in the request, please provide the salary rate. If the salary is not included in the request, please provide the salary rate. If the salary is not included in the request, please provide the salary rate.

Types of Appointment and Comments:	
G&V Collaboration	
Joint Appointment	X
Spokesperson	
Run Coordinator	
International Fellow	
Fellowships	
Indian Student Program	
Other	

Instructions:
 Enter data only in cells that are not highlighted in gray. The gray areas are protected from editing.
 Do not include any of the Lab's burdening charges (OP/IO, Vacation, Fringe) in "Base Salary", only include the agreed upon salary. If the salary is going to be paid as a reimbursement (Purchase Order) to a University, it is considered a "reimbursement", not salary.
 Include all relevant additional information under "Comments"

Sample G&V Faculty – Purchase Requisition



PURCHASE REQUISITION

Requisition Number (filled in by System)	Create Requisition (filled in by System)	Date	Request Originator: Steve Brice	Revision: 0748 MC: 220
Director/Section Approval		Date	NEPA Approval	
Business Office Approval		Date		
Director's Approval		Date		

Requisition Header
 Description (of entire requisition)
 Mason (G-2) – Partial academic salary and fringe associated with the service of Professor J. Doe to Doe University in his role as Co-Spokeperson of the Mason (G-2) Collaboration 9/1/2012 – 8/31/2013.
 Name to Approver
 Justification (to Approver)
See SOW & Guest Appointment Letter

Requisition Entry Defaults	Requester Steve Brice	Buyer Name (use attachment) (i.e., Previous PO)	Buyer Email (use attachment) No delivery
	Suggested Vendor Doe University	Suggested Vendor Site 40/40 59.03 IF G-2 G&V	Suggested Vendor Contact Contact Name
	Reference #	Project/Task/Expense Type and Expense Organization 40/40 59.03 IF G-2 G&V	Suggested Vendor Telephone # 1-630-129-1112 Building Maintenance: Yes or No Price Code \$ XX,XXXXX
	Name to Invoice		Project # Total of Requisition \$ XX,XXXXX

Requisition Lines				Quantity, Unit of Measure and Price		Project Information		Split Coding
Line #	Line Type	PO Line Category	Description (Start with a Name) (20 Character Maximum, Enter Additional Description in Cell Below Line Item)	Quantity	Unit of Measure	Project	Task	Costing
1	SN	Service	Mason (G-2) – Partial academic salary and fringe associated with the service of Professor J. Doe to Doe University in his role as Co-Spokeperson of the Mason (G-2) Collaboration 9/1/2012 – 8/31/2013.	XXXXX	\$	40	40 59.03	
				1			Professional Services	
				XXXXX			PPD/Institutionally Frontier	
2								
3								

PPD_ADMIN_026 Sample

Sample G&V Faculty – SOW

Statement of Work J. Doe – Doe University Muon (g-2) Collaboration September 1, 2012 – August 31, 2013

1. Introduction

This Statement of Work (SOW) provides details of the scope of work for J. Doe of the Doe University while being partially paid by FNAL for work on the Muon (g-2) Collaboration, September 1, 2012 – August 31, 2013.

2. Activities Planned

J. Doe will take on all required responsibilities of the Muon (g-2) Co-Spokespersonship, as defined in the bylaws of the Muon (g-2) Collaboration.

3. Cost

Salary reimbursement	Fringe Benefits	Indirect Costs	Sum
\$XX,XXX	\$XX,XXX	(Waived)	\$XX,XXX

4. Doe University Contacts

Spokesperson Contact:
Prof. J. Doe
Department of Physics
1234 Kirk Rd.
Batavia, IL 60510
Phone: 1-630-123-4567

University Contact:
Contact Name
Office of Sponsored Programs
Doe University
1234 Kirk Rd.
Batavia, IL 60510
Phone: 1-630-123-1112

Approved By:

J. Doe, Doe University
Muon (g-2) Co-Spokesperson

Date

Steve Brice, FNAL Intensity Frontier
Department Head

Date

Mike Lindgren, FNAL Particle Physics
Division Head

Date

Directorate, FNAL

Date

Sample G&V Faculty – MOU

Memorandum of Understanding Between Fermi National Accelerator Laboratory, and Doe University

I. Introduction and Purpose of the Memorandum

This memorandum of understanding is intended solely for the purpose of providing additional financial understanding among Fermi National Accelerator Laboratory (FNAL), the Muon (g-2) Collaboration and Doe University.

This MOU outlines an understanding related only to the payment of partial academic salary associated with the service of Professor J. Doe in the role as Co-Spokesperson of the Muon (g-2) Collaboration.

II. Institutions Covered by this Agreement

Doe University is a full collaborating institution in Muon (g-2) and is the employer of Professor J. Doe.

III. Terms of the Agreement

A statement of work (SOW) will be provided annually by Professor Doe to facilitate appropriate budgeting and requisitions

Approved By:

J. Doe, Doe University
Muon (g-2) Co-Spokesperson

Date

Steve Brice, FNAL Intensity Frontier
Department Head

Date

Mike Lindgren, FNAL Particle Physics
Division Head

Date

Directorate, FNAL

Date

Guest & Visitor (G&V) Per Diem, Visa Letter and Guest Scientist Process

This process is required when there is Per Diem, a Visa Letter and/or Guest Scientist salary.

The approved G&V Form is required prior to issuing a Per Diem voucher.
A Scientific Offer Information Form and CV are required for Guest Scientist salary.

G&V Form

- Approval tab – Fill in completely, include project/task number
- G&V Template tab: Include all costs
 - Guest appointment letter:
 - Required when there is a Visa Letter request and /or Guest Scientist salary
 - Letter coordinates: email to guest; cc to Requestor, ppdfinancial@fnal.gov (PPD Finance), Department Admin, Division Admin and Visa office if a visa is required.

Email completed G&V form to ppdfinancial@fnal.gov

The Division Head will approve and forward to the Directorate to generate the Visa Letter and/or Guest Scientist appointment letter. The Directorate will forward the letter to the Letter coordinates; the guest should accept with a cc to all. Once the letter is received the Department Admin will forward the G&V form to the Visa office if a Visa is required.

Guest Scientist Salary

Once the appointment letter is received and accepted the Scientific Offer Information form and CV are required.

Scientific Offer Information Form

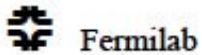
Fill in completely, include all join specifics

- Include project/task number for move and salary
- Include stock code: #1 = up to \$500, #2 = up to \$2500 and #3 unlimited
- Include travel code: Business Services Website; Business & Finance Forms & Services; PAL or Travel Code Reference link
- Additional Comments: Include Supervisor, Kronos Supervisor and Start Date
- Email form & CV to Jason Johnson, ppdfinancial@fnal.gov (PPD Finance), Department Admin and Division Admin

To request the G&V form, send email to ppdfinancial@fnal.gov

To request sample templates, send email to steph@fnal.gov

Sample G&V Per Diem, Visa Letter and Guest Scientist – Approval Form Tab



APPROVAL/AUTHORIZATION FOR HIRING or APPOINTMENTS

Type of Request: G&V New Appointment MOUS
 G&V Extension to Appt. SOW'S
 Personnel Requisitions Requisition Attached / Needed

Guest Name / Institution:

J. Doe / Doe University

What work will this person do?

J. Doe will take on all required responsibilities of the Muon (g-2) Co-spokes-personship, as defined in the bylaws of the Muon (g-2) Collaboration.

Why are we offering this appointment?

Doe University is a full collaborating institution in the Muon (g-2) Collaboration.

What funding type supports this request?

40/40.59.03 IF g-2 G&V

Is it in the budget for funding type:

Yes

Directorate Approval: _____

Date: _____

PPD_ADMIN_026 Sample

Sample G&V Per Diem – G&V Template Tab

PPD Guests and Visitors Request

Summary:	Dept Head Approval:		Name of Requester: Steve Bice						
Guest Name/Institution/Type of Apts./Experiment	Proposed Start Date	Proposed End Date	Task #	Task Name	Department	% Distribution to Task	SWF	M&S	Total Request
J. Doel	1-5ep-2013	15-5ep-2013	40.59.03	PPD G-2 Guests & Visitors	Institute Frontier	100.0%	0.00	2,895.00	2,895.00
Doel University							0.00	0.00	0.00
							0.00	0.00	0.00
Estimated Total							0.00	2,895.00	2,895.00

Details of Proposed Agreement:

Type of Agreement	Days	Months	Amount per day	Amount per month	Single Occurrence Charge	Sum of SWF	Sum of M&S	Total
Base Salary	15.0	0.5				0.00	0.00	0.00
Reimbursement to University	15.0	0.5	32.00				480.00	480.00
Car Rental	15.0	0.5	100.00				1,500.00	1,500.00
Housing	15.0	0.5	61.00				915.00	915.00
Per Diem	15.0	0.5					0.00	0.00
Travel	15.0	0.5					0.00	0.00
Other (Please Specify below)	15.0	0.5					0.00	0.00
	15.0	0.5					0.00	0.00
	15.0	0.5					0.00	0.00
	15.0	0.5					0.00	0.00
OP/TO, Vac, Fringe	15.0	0.5					0.00	0.00
Total	15.0	0.5				0.00%	0.00	2,895.00

If Guest appointment letter is required, please provide "coordinates" of where the guest will be staying.

Type of Appointment and Comments:	
G&V Collaboration	
Joint Appointment	X
Spokesperson	
Run Coordinator	
International Fellow	
Fellowships	
Indian Student Program	
Other	

Instructions:
 Enter data only in cells that are not highlighted in gray. The gray areas are protected from editing.
 Do not include any of the Lab's burdening charges (OP/TO, Vacation, Fringe) in "Base Salary", only include the agreed upon salary. If the salary is going to be paid as a reimbursement (Purchase Order) to a University, it is considered a "reimbursement", not salary.
 Include all relevant additional information under "Comments"

Sample G&V Visa Letter – G&V Template Tab

PPD Guests and Visitors Request

Summary:	Dept Head Approval:		Name of Requester: Steve Brice						
Guest Name/Institution/Type of Apts./Experiment	Proposed Start Date	Proposed End Date	Task #	Task Name	Department	Distribution % to Task	SWF	M&S	Total Request
J. Doel Doe University	1-5-07-2012	31-Aug-2013	40-59-03	PPD G-2 Guests & Visitors	Interity Frontier	100.0%	0.00	0.00	0.00
Estimated Total							0.00	0.00	0.00

Details of Proposed Agreement:

Type of Agreement	Days	Months	Amount per day	Amount per month	Single Occurrence Charge	Sum of SWF	Sum of M&S	Total
Base Salary	365.0	12.0				0.00	0.00	0.00
Reimbursement to University	365.0	12.0				0.00	0.00	0.00
Car Rental	365.0	12.0				0.00	0.00	0.00
Travel	365.0	12.0				0.00	0.00	0.00
Other (Please Specify below)	365.0	12.0				0.00	0.00	0.00
	365.0	12.0				0.00	0.00	0.00
	365.0	12.0				0.00	0.00	0.00
	365.0	12.0				0.00	0.00	0.00
GP/TO, Vac, Fringe	365.0	12.0				0.00	0.00	0.00
Total	365.0	12.0				0.00	0.00	0.00

If Guest appointment letter is required, please provide "coordinates" of who is making the request to the Department Admin, Division Admin, Visa Office

Type of Appointment and Comments:		
G&V Collaboration		
Joint Appointment	X	
Spokesperson		
Run Coordinator		
International Fellow		
Fellowships		
Indian Student Program		
Other		

Instructions:
 Enter data only in cells that are not highlighted in gray. The gray areas are protected from editing.
 Do not include any of the Lab's burdening charges (GP/TO, Vacation, Fringe) in "Base Salary", only include the agreed upon Salary. If the salary is going to be paid as a reimbursement (Purchase Order) to a University, it is considered a "reimbursement", not salary.
 Include all relevant additional information under "Comments"

Sample G&V Guest Scientist Salary – G&V Template Tab

PPD Guests and Visitors Request

Summary:	Dept Head Approval:		Name of Requester Steve Binko						
Guest Name/Institution/Type of Apts./Experiment	Proposed Start Date	Proposed End Date	Task #	Task Name	Department	% Distribution to Task	SWF	M&S	Total Request
J. Doe/ Doe University	1-5ep-2012	31-Aug-2013	4059.03	PPD G-2 Guests & Visitors	Intensity Frontier	100.0%	#VALUE!	0.00	#VALUE!
							#VALUE!	0.00	#VALUE!
							#VALUE!	0.00	#VALUE!
Estimated Total							#VALUE!	0.00	#VALUE!

Details of Proposed Agreement:									
Type of Agreement	Days	Months	Amount per day	Amount per month	Single Occurrence Charge	Sum of SWF	Sum of M&S	Total	
Base Salary	365.0	12.0		XXXXXX		#VALUE!	0.00	#VALUE!	0.00
Reimbursement to University	365.0	12.0				#VALUE!	0.00	#VALUE!	0.00
Car Rental	365.0	12.0				#VALUE!	0.00	#VALUE!	0.00
Housing	365.0	12.0				#VALUE!	0.00	#VALUE!	0.00
Per Diem	365.0	12.0				#VALUE!	0.00	#VALUE!	0.00
Travel	365.0	12.0				#VALUE!	0.00	#VALUE!	0.00
Other (Please Specify below)	365.0	12.0				#VALUE!	0.00	#VALUE!	0.00
	365.0	12.0				#VALUE!	0.00	#VALUE!	0.00
	365.0	12.0				#VALUE!	0.00	#VALUE!	0.00
	365.0	12.0				#VALUE!	0.00	#VALUE!	0.00
OP/TO/Vac. Fringe	365.0	12.0				#VALUE!	0.00	#VALUE!	0.00
Total	365.0	12.0				0.0%	#VALUE!	0.00	#VALUE!

* Guest appointment letter is required, please provide "coordinates" of where the guest will be staying. Email to J. Doe at jdoe@doe.edu and copy to Requester, PPD Finance pdfinancial@rtrn. Division Admin, Visa Office if a visa is required

Types of Appointment and Comments:	
G&V Collaboration	
Joint Appointment	X
Spokesperson	
Run Coordinator	
International Fellow	
Fellowships	
Indian Student Program	
Other	

Instructions:
 Enter data only in cells that are not highlighted in gray. The gray areas are protected from editing.
 Do not include any of the Lab's burdening charges (Op TO, Vacation, Fringe) in "Base Salary". If the salary is going to be paid as a reimbursement (purchase Order) to a University, it is considered a "reimbursement"; not salary.
 Include all relevant additional information under "Comments"

Sample G&V Guest Scientist Salary – Scientific Offer Information Form

Fermilab**Scientific Offer Information
Research Associate****Personal Information**

Candidate Name:

Dr. J. Doe

Home Address (1):

1234 Kirk Rd

Home Address (2):

Home Address (3):

City: Batavia

State: Illinois

Country: USA

Postal code: 60510

Phone (H): 1-830-123-4567

Phone (W): 1-830-123-8910

Email: jdoe@doe.edu

To Join Specifics

Move - Project/Task #: 40

Salary - Project/Task #: 40.44.100.01

Airfare Y X N

Stockroom Code: I

Round-Trip Y N X

Travel Code: 1170379

Temp. Housing Y X N

Rental Car Y X N

Per Diem Y N X

Household Move Y X N

THIS FORM COMPLETED BY:

Steve Brice

EXT: 8748

Additional Comments:

Supervisor: Steve Brice

Kronos Supervisor: Steve Brice

Start Date: January 2, 2014

Please attach to copy of offer letter and return to Jason Johnson, MS 116

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