

Guest and Visitor Process

PPD Policy 026-v08

Purpose

This document describes the procedures for authorizing visitors to the Fermilab site and payment of their expenses.

Policy

A Guest & Visitor request is required if Fermilab will be providing any type of accommodations including, but not limited to, transportation, housing, per diem, computing privileges or if the guest will be on-site at Fermilab for more than one day. A list of cases when a Guest & Visitor request is required can be found in the Scope section below.

1. Submit the Guest & Visitor request form on our SharePoint site:
<https://fermipoint.fnal.gov/service/PPDGVRequest/>
2. Fill in all required fields and relevant information about the guest.
3. Include an Administrative Assistant in the “Requestor(s)” field to ensure proper coordination of the guest’s stay.
4. If a group of visitors will be coming for the same purpose, one G&V request may be submitted with the list of visitors and their contact information as an attachment to the request.
 - a. The group request should only be for U.S. citizens. An individual G&V request must be submitted for each non-U.S. citizen.
5. Once the Guest & Visitor request is submitted, it is routed to PPD Finance to check funding on the listed project/task code (if applicable). After Finance’s review is complete, the request is forwarded to the PPD Division Office for final approval. If the Division Office approves, a notification email will be sent to the listed Point of Contact and Requestor(s). Invitation letters for foreign citizens are handled by the Foreign Visits & Assignments group as part of the site access request and on-boarding process. If a formal invitation letter is needed for U.S. citizens, the Point of Contact or Division Office can issue one on Fermilab letterhead.
6. If the guest or visitor is going to be reimbursed via a Purchase Order issued by Fermilab to a university or other institution, a Purchase Requisition must be entered separately by a requisition preparer.
 - a. Typically, a Statement of Work (SOW) is compiled which outlines the scope of work, costs and time frame and should include:
 - i. Introduction

- ii. Activities planned
 - iii. Costs
 - iv. University/institution contacts
 - b. The SOW should accompany the Purchase Requisition as an attachment.
 - i. If the total cost of the Purchase Requisition exceeds \$10,000.00, a Sole Source justification needs to also be included with the Purchase Requisition as an attachment. See policy PPD-018 for specific purchase requisition requirements.
7. The Office of the Director and the Visa Office may make changes to the required information needed to process requests for foreign visitors. This information will be posted on PPD's Guest & Visitor SharePoint site as it becomes available.

Questions on this process should be directed to the PPD financial team.

Owner

Responsibility for reviewing, updating, and communicating changes to this policy rests with the Senior FFM.

Review Cycle

This policy is to be reviewed every three years.

Scope

Conditions requiring a Guest and Visitor request:

- The guest/visitor is coming from a foreign country
- Fermilab is paying for any costs related to the visit and the visitor is not part of an experiment's collaboration group
- The guest/visitor will be staying on-site at Fermilab during their visit
- The guest/visitor will be working on/providing expertise on an experiment
- The guest/visitor will need computing privileges
- Any of the above apply even if the request is no cost
- Fermilab will be doing a "salary buy out" from the guest/visitor's institution via purchase order
- The guest/visitor is part of an experiment's collaboration group but will be doing work on another experiment

Conditions when a Guest and Visitor request is **not** required:

- The guest/visitor is part of an experiment's collaboration group and will be doing work on that experiment
- The guest/visitor will be at Fermilab for only a few hours (e.g. to attend a single meeting or workshop or to be a guest speaker) and is not coming from a foreign country
- The guest/visitor is at the lab for a job interview

Revision History

Version	Date	Author	Notes
v01	Not dated		Original Creation
v02	2/5/2019	K. Rogers	Updated
v03	5/17/2019	J. Lewis	New format. Minor corrections.
v04	5/30/2019	K. Rogers	Spelling/grammar corrections.
v05	6/13/2019	K. Rogers	Added requirements for groups
v07	7/24/2020	K. Rogers	Added reference to purchase requisition policy and modified wording for group requests; minor formatting changes.
v08	8/13/2021	K. Rogers	Update to invitation letter process