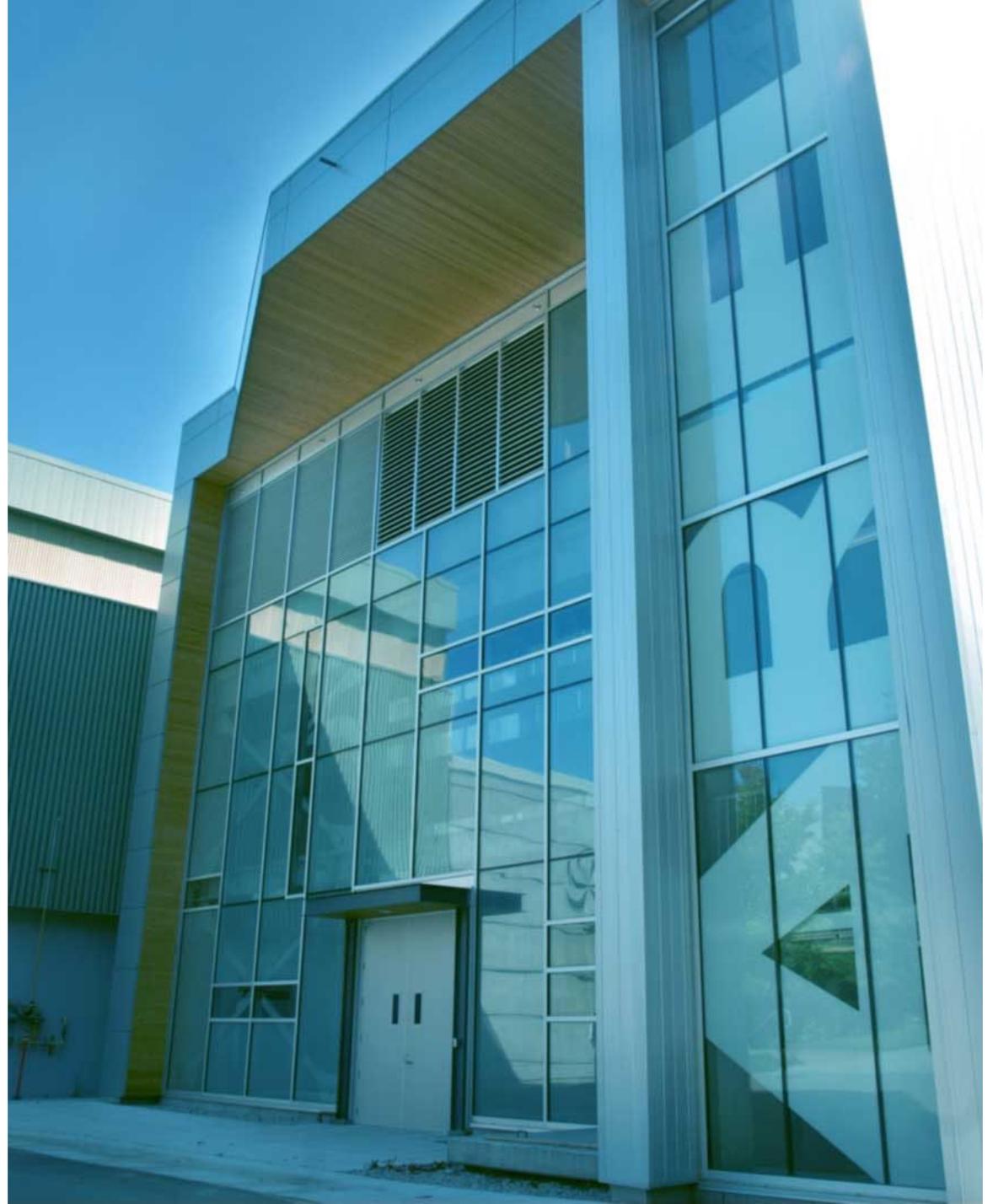


User and Visitor Support at TRIUMF

Marcello Pavan

Academics and User Programs Office

2023-08-04



Outline

- New Visitor Management Policy
- TUG user management plan (CRM)
- Visitors and Work Permit Exemptions
- TUG-TRIUMF “issue tracker”
- *AOB time permitting*



Updating Visitor Management POLICY

Establishing new framework for roles and responsibilities for visitor management

New Visitor Policy + reworked TSOP-10
Under review prior to formal approval this month

Biggest change: each visitor will now have a unique *Host* responsible and accountable for safety and actions of their visitors

Will liaise with Facility Coordinators, EH&S to secure visitor safety and training

Hosts will have more to do to support their visitors

Implemented in two stages

After policy approval, adjust existing “visitor app” as much as possible

Implement in full once new Visitor system in place

Visitors Policy

Document Type: **Administrative Policy**
Release: 3 Release Date: 2023-MM-DD

	Name:	
Author:	M. M. Pavan	Approval Record
Reviewed By:	A. Fong	
	K. Hayashi	
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	P. Schaffer	
	O. Kester	
Approved By:	N. Smith	

TSOP-10 Access to TRIUMF

Note: Before using a copy (electronic or printed) of this document you must ensure that your copy is identical to the released document, which is stored on TRIUMF's document server.

20230418 174100 Template: Document- Page 1 of 8
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Document Type: **TRIUMF Standard Operating Procedure (TSOP)**
Release Date: **2023-07-20**
Author(s): **A. Lee, M.M. Pavan**

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Author:	A. Lee, M.M. Pavan	Approval Record
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Approved By:	N. Smith	

Visitor Management (interim) solutions

4

- Regular meetings with IT&S to track, manage issues
- Trick is to make interactions of 4 separate systems (visitor application, Workday, TRIDENT, and MFA) as clear as possible to visitors and *Hosts*
 - Added FAQ on website to help with thorniest questions - DONE
 - Edited "notification" emails to clarify instructions - DONE
- Upcoming: Adjust the existing "visitor app" to accommodate Hosts
- *VERY much still a work in progress. Your patience is much appreciated...*

Updating Visitor Management SYSTEM

- Working on wholly redesigned application based on Microsoft Dynamics
 - Funded through infrastructure fund
 - Includes 'managed' and 'supervised' visitors
- Will manifest new Host policy
- Should be *simpler* to use

- Waiting for Dynamics system to be enabled at TRIUMF
 - Good news: that work is happening as we speak
 - Hoping to start implementation in the fall

VMS Requirement Document

Workflow

The system shall allow creation of a robust and customisable workflow to approve or reject the requests of a visitor.

Systems to Integrate with

Access Management System, Dosimetry App, Training Management System, Workday, Science Division Tools (Science App), Trident Account Provisioning System, Office 365 (Outlook, Teams, etc.)

People can switch between streams (Visitor App / HR stream / Co-op stream) and it can be difficult to pull the pieces of information together to figure out what their current status is. So, it is important that the new VRS speaks to the above-mentioned systems.

User Friendly User Interface

The system shall be user friendly. Both the interface and the underlying processes shall be user friendly and intuitive.

Profile Details

Along with the pre-existing fields of the current Visitor Request System, the system shall also add the following fields to the profile of a visitor:

1. Designation of a visitor
2. Training Records, Status and Deadline
3. What is their current status / where are they currently in the process
4. When do they plan to come on site – actual arrival
5. Length of site visit (departure date) – this determines whether they get a Visitor Card or an access card
6. What stream a visitor is under (Visitor App, Co-op, HR hired - except Affiliate)
7. Dynamic summary of when a visitor is switching streams
8. Any existing entries under Access Management System or an existing radiation badge
9. Any historical records with TRIUMF

TUG User Management Plan

- Current member management inadequate
 - Email address in an email mailing list
- TRIUMF will be implementing a site-wide Contact Relation Management system
 - Based on Microsoft Dynamics
 - Basic implementation underway as we speak
- Dynamics will be used for TUG member management
 - More info about users: fields of interest, experiments, collaborators, etc
 - Self managed
 - Tailored communications

CRM

Requirements

Document

8. Types of Contacts (including but not limited to)

8.1. Board Members and people associated to the Board

8.2. TRIUMF Inc. Management

8.3. Stakeholders

8.4. Employees

8.5. TRIUMF Users Group (TUG)

8.6. TRIUMF Alumni and Retirees Association (TARA)

8.7. Government Personnel

8.8. TRIUMF's contacts at other institutions or labs

8.9. Universities with whom there are associations

8.10. Outreach: High School Connections, Institutions across the globe

8.11. Business Relationships

8.12. Community Contacts

8.13. Media Contacts

8.14. Visitors (Performing experiments, Public visiting the lab and other VIPs visiting

Foreign Visitors and Work Permit Exemptions

- Foreign Visitors coming to TRIUMF should* get an invitation letter to support their entry
 - Arranged with HR through the Visitor's Host
 - (basically) Two Kinds:
 - Business visits: meetings, conferences,
 - Research visits: conducting experiments, active research collaboration (e.g. theorists)
- (basically) Two kinds of research visits:
 - Stay <120 days in any given 12-month period
 - work permit exempt. Letter suffices for entry
 - Will be in country >120 days from first entry in any 12-month period
 - require work permit!
 - Processing time varies. Start ASAP!!
- Confused?
 - Visitor: contact your Host
 - Host: Contact me

Before Your Visit to TRIUMF

Please note that the requirements for short-term visitors (under 6 months) have changed. Most people need a visa or an Electronic Travel Authorization (eTA) to travel to Canada. Please visit the [Government of Canada website](#) to determine which type of documentation you will need.

If you have any questions about how work permits, visas, invitation letters, etc and pertain to TRIUMF visitors, please contact your TRIUMF Host/Contact, or see [here](#). For further details, please contact our [Visitor's office](#).

Invitation Letters, Work Permits, and Immigration

From within Canada
contact your TRIUMF Host for details of any paperwork required.

From outside of Canada
Many users coming to the TRIUMF facility are foreign nationals and as such they will require special paperwork and documents to fulfil regulatory requirements.

Please visit [Visitor Work Permit & Immigration](#) for important information about the steps necessary to successfully plan a visit to TRIUMF. (i.e. your TRIDENT authorization is required to login)

For visitors planning longer term visits, or to visit TRIUMF more than once in a year, please pay particular attention to the details of the 120-day researcher exemption.

> Temporary Foreign Worker & Immigration > Visitor Work Permits & Immigration

Visitor Work Permits & Immigration

View Edit Revisions Devel

Visitor Immigration

TRIUMF is part of the international science community and is involved in many international projects, experiments, and collaborations. A key part of these is having scientists, researchers, and students visit TRIUMF to collaborate and use TRIUMF equipment, etc. as part of their employment or studies.

Visitors come to TRIUMF for their own purposes, including:

- Thesis research
- Research for their own research program, or as part of their employment with their home institution
- As part of a collaboration with TRIUMF
- A practicum course requirement for a degree or diploma

While not employed by TRIUMF, foreign visitors are entering Canada to perform work as defined by IRCC and may require a work permit in addition to the Temporary Resident Visa (TRV) or Electronic Travel Authorization (eTA).

If the intended visitor is coming for TRIUMF purposes, they may need to be hired as an employee and compensated appropriately. This would include:

- Work experience requirements for a degree or diploma
- Work that primarily benefits TRIUMF programs

All foreign visitors require a TRIUMF Invitation Letter from their host division to facilitate their entry to Canada and support either a work permit or work permit exemption. To request an Invitation Letter, please have

TUG-TRIUMF Issue Tracking presented to Leadership Team for review biannually

									
TUEC Feedback Tracker									
Last Update: 2023-07-12 (CD)									
ID	Date Issued	Topic	TUEC Feedback	TRIUMF Response	TRIUMF Owner	Status	Actions Taken	Additional Comments	Additional Comments - II
TUEC-2023	2023-07-12	Payment for tour guides and new guide inclusion	Current guides are actually being paid this time. However, TRIUMF tours are currently limited exclusively by the process of getting new members of the team onto UBC WorkDay Payroll.	Accepted	Marcello Pavan	In Progress		This was apparently what HR decided had to be done (rather than your suggestion of considering them providers of a service with invoices submitted to TRIUMF).	HR have repeatedly said "we will do this next week" over the past several months, and we are now already missing out on opportunities for students and postdocs to get experience in this over the summer during the trialling of this programme, as well as missing out on opportunities for delivering additional tours. There are students already signed up to do this and all available tours filled up immediately when made available.
TUEC-2022-01	2022-07-12	Search for PSD director	PSD director search is too delayed and overdue, and must be prioritised.	Accepted	Nigel Smith	In Progress	Committee established, chair confirmed, recruitment package defined currently being evaluated from an EDI perspective.	Senior Management accepts that this has taken too long, and other senior management hires have been prioritised lately. The process now appears to be on track, though the timeline for this has not yet been communicated.	
	2023-03-23	LMIE-120 day rule communication	TRIUMF webpages lack a clear re-statement of the rules and how users will be affected. No email was sent out by HR to inform TRIUMF and external users. https://www.triumf.ca/node/41007/visitor_immigratio n#st	Accepted	Marcello Pavan	In Progress	MP investigating (as of 28/03/23) with HR what the rules actually are, and whether the internal page stands. (July 19/23). The internal page is the definitive word from HR and TRIUMF's immigration consultant. Communication on the rule will go out in the next User Newsletter (due end of July). new CAD + HR + Marcello will meet to discuss the policy and to finalize the interpretation and TRIUMF's policy for implementation ongoing.	As this is an imminent concern in the experimenter and user community, we should expect that this will be queried in the open Community meeting, Friday 31/03/23. If it does, both TUEC and TRIUMF management (NS) agrees that this would be incredibly difficult to manage, and could potentially be devastating for Canada's research. If it does apply for TRIUMF visitors, actions will be: Website with LMIE details will be made publicly available, linked from	Specific questions for TRIUMF Management, following OPEN TUG Meeting: (1) has it been clarified whether the 12-month period is a calendar year or is this required for two one-week visits during "any 12 month period starting at the time of the first visit" as long as they are separated by more than 4 months?; (2) is the existing, recently hidden, page ready for communication with users, and has it been made public?; (3) are the HR procedures and capacity set up
	2022-06-06	No clear policy who is responsible for visitors (in particular guidance with paperwork & trident setup)	Currently, users/visitors rely on local liaisons for guidance and help with paperwork for experimental visits at a level that is felt to be too time-consuming. Workday has complicated procedures to invite visitors. Facility coordinators are automatically assigned as supervisors for visitors but are not automatically notified.	Accepted	Marcello Pavan	In Progress	A revised framework for managing visitors has been accepted by management. Implementation requires changes to TSOP-10 and other documents. Some interim measures that can be easily implemented are under discussion. MP went through active visits and checked contacts. Assigned visitors to appropriate facility/contact where needed.	Moved to in progress 06/03/2023	
	2022-09-01	User management system and data base	Many of the other feedback aspects (see particularly above) are linked with the insufficient management of user data, including links to home institutions,	Accepted	Marcello Pavan	In Progress	In process of developing it. CRM Vendor has been selected and implementation underway. VMS will start once the initial CRM implementation is		

- Process working reasonably well so far
- Important that you **bring your issues to TUEC!**

Communication with Users



Scientific Visitors website

triumf.ca/home/for-scientific-visitors

One-stop shopping for all your visitor info needs

- Information for researchers *Before*, *During*, and *After* their visit
- Reasonably complete as is

Frequently Asked Questions

- Mostly about TRIDENT and MFA
- will be updated as needed

For Scientific Visitors

[View](#) [Edit](#) [Devel](#)

Please check [TRIUMF's Covid-19 Lab Policy and Procedures page](#) for the latest information

See [below](#) for new travel pre-approval and travel information forms

Information for Users

[COVID-19 Site Safety Guidelines](#) [PDF]

New Visitor Safety Guidelines at TRIUMF during the COVID-19 public health emergency. Please read when planning a visit to TRIUMF.

[User Liaisons](#)

Before, during, or after your visit to TRIUMF, please contact the [Visitor Liaisons](#) with any questions or concerns.

[Guide for Experimenters - Wiki](#)

The purpose of this wiki is to provide all the necessary information to allow a user to propose, plan, and run an experiment at [TRIUMF](#). It is managed by the Beam Delivery group within the Accelerator Division and is meant to complement the information about TRIUMF's [research program](#) available on the lab's web site.

[Beam-Delivery-Updates mailing list](#)

This mailing list provides updates to users on the state of beam delivery (cyclotron, ISAC, and ARIEL) at TRIUMF. This includes a (new!) weekly update of recent developments and near-term plans including scheduling changes, as well as updates when issues arise impacting more than one shift. [Click on the link](#) to subscribe and to [view the archives](#).

[User Services Newsletter](#)

User Liaison Scientists

Assist visitors with technical needs, including:

- [proposal writing and submission](#)
- [beam time requests](#)
- [project initiation](#)
- [equipment transport to TRIUMF](#)
- access to local infrastructure
- [safety orientations](#) and report preparations

Manage feedback from users' experiences while at the lab.

User Liaisons

- Martin Alcorta - *Isotope Beams*
- Iain McKenzie - *CMMS*
- Thomas Lindner - *Science Tech.*
- Isabel Trigger - *M11 Testing*
- Connie Hoehr - *Life Sciences*
- Camile Champagne-Belanger – *PIF/NIF*

Beam-delivery mailing list

Subscribe at: lists.triumf.ca and search for *beam-delivery-updates*

Weekly update about the state of beam delivery at TRIUMF

- Stable beams
- RIB
- Medical isotope production
- PIF/NIF
- Schedule

most up to date information provided to the lab

Marcello Pavan Beam Delivery Updates July 20, 2020
[Beam-delivery-updates] Beam Delivery Weekly Update for July 13- July 19, 2020
To: & 1 more

This message is from a mailing list.

TRIUMF Beam Delivery Report - Week 29: July 13 - July 19, 2020

Users having any questions or concerns are requested to contact their respective [User Liaison](#) contact delivery@triumf.ca

The beam-delivery-updates archive can be found [here](#).

520 MeV Beam Delivery

- Cyclotron Availability: **98.5%**
- Accumulated Cyclotron Availability for **2020**: **97.3%**
- Cyclotron Downtime: **2.85 hours**

- BL2A Downtime: **116.2 hours**

- BL2A was brought online for the first time this year with 5uA sent to ITW. An issue with upstream of the target (2A2M19) needs to be resolved before the extracted current can be used. Experts are working on this today and the path forward will depend on their conclusion defined OFF since Friday.
- BL2C delivered to STF all week as planned.
- During maintenance day on Tuesday the ion source filament was changed.
- The RF dee voltage has been increased from 84kV to 87kV.

ISAC Beam Delivery

- **SIB downtime – none**
- Oxygen-17 3+ was delivered from MCIS to DRAGON experiment S1932.

- **RIB downtime – 131.4 hours (driver protons unavailable)**
- The beam time was intended for development with the new graphite target.
- The hope is to increase the current on this target once the issue with 2A2M19 is resolved.

Schedule Updates

- “Mini-shutdown” maintenance activities will be planned during August 18-25 (moved from Oct 18-25)
- During this time, blocks will be moved back into the Meson Hall and the new cooling tower construction will take place.
- The beam delivery schedule can be found [here](#).



User Services Newsletter

Regular news and updates of services and developments of interest to TRIUMF Users.

- Includes:
 - on-site experimental program
 - Now including Life Science and PIF/NIF
 - technical services, e.g. detector and data acquisition systems and other experimental system development and manufacturing
 - Recent admin updates
- Latest issue covers 5-year Plan, work permits, EIC-Canada collaborations

Haven't been getting them? Contact marcello@triumf.ca

The screenshot displays the user interface for the TRIUMF User Newsletter #12. At the top, there is a navigation bar with options: 'Details', 'E Emphasize', 'A Accent', 'Link', and 'Focus Points'. Below this, the main title 'TRIUMF User Newsletter #12' is prominently displayed. A green plus sign is visible below the title. The content is organized into sections:

- 1 - Volume 6 | No. 1 August 2023**: This section includes a 'Background' card with a grid pattern and a 'Heading 1 Card' containing the text 'Volume 6 | No. 1 August 2023'.
- 1.1 - Contents**: This section features a 'Heading 2 Card' with the title 'Contents' and a 'Text Card' listing the following items:
 1. Letter from the Executive Director: TRIUMF's next Five-Year Plan
 2. Important Note about Foreign Visitors and Work Permit Exemptions
 3. TRIUMF and the Canadian Electron-Ion Collider Collaboration
 4. Visitor Liaison Updates
 5. ARIEL/ISAC Development Updates
 6. TRIUMF Users Group Update

Lots of other things on the go.

Top of the list:
Desk Space

(still)



Summary

TRIUMF is continuing its commitment to improve the User experience at the lab

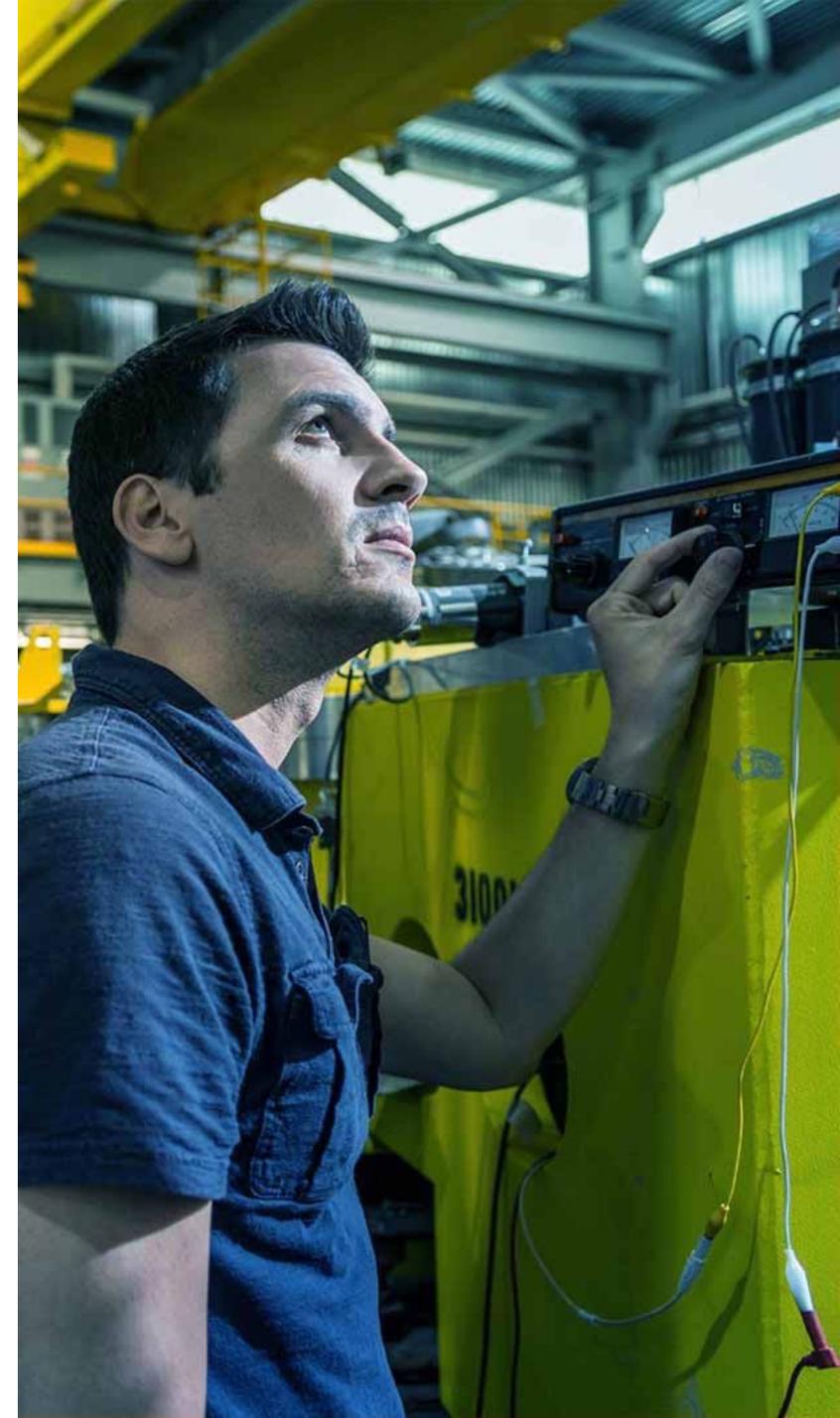
Academics and Users office coordinating activities

Changes happening on many fronts:

TUG-TRIUMF relationship

Visitor management

Communications



What have I missed?



Thank you
Merci

Any Questions?

www.triumf.ca

Follow us @TRIUMFLab

