Team Leaders e-learning

1. Introduction

1.1 Main Title
1.2 Course objectives

1) To define my duties and obligations
   - Responsibilities towards my team
   - Communication between CERN and my home institution
   - Responsibilities towards CERN and my home institution

2) To validate my appointment

   NOTE: the team leader role is activated only when all three of the following requirements are met:
   1. The team leader has successfully passed this course;
   2. The team leader has a valid contract with CERN;
   3. The team leader has been officially appointed.
1.3 What you will learn

Introduction
1. What is a team?
2. What is a team leader?
3. How is a team established?

Role of the home institution
1. Overview
2. Appointment of a team leader – appointment form
3. Administrative formalities for team members – Home Institution Declaration

Duties and obligations of the team leader
1. Responsibilities towards CERN – on behalf of the home institution
2. Verification of data – home institution and team members
3. Responsibilities towards team members – before arrival at CERN, while working at CERN, when leaving CERN

Glossary and useful resources
1. People
2. Administrative tools and documents
3. Useful resources
2. 1. Establishing a team

2.1 Establishing a team

Establishing a team
- Appointing a team leader
- Home Institution Declaration
- Responsibilities of the team leader
- Before team members arrive at CERN
- While team members are at CERN
- Preparing for a team member's departure
- Conclusion
2.2 What is a team?

A team is a group of users who are affiliated with an institute and participate in an experiment.
2.3 What is a team leader?

Each team is composed of one team leader and at least one deputy team leader, who supervise as many team members as required.
2.4 How is a team established?

A team is established following the conclusion of a specific agreement, called a memorandum of understanding or "MoU", between the home institution and a particular CERN Experiment.
Once the MoU has been signed, the home institution can appoint team leaders and start sending collaborators to CERN who join a team and thus become associated members of the personnel (generally "users").
2.5 Role of the home institution

Overall responsibility for the team and its members

Appoints team leaders and deputy team leaders and sends team members

Completes and signs official documents

Appoints a Safety Correspondent.
The team leader and the deputy team leaders can be appointed as safety correspondent

Informs CERN about changes of:
- team leader or deputy team leaders
- Team members' contract conditions in the home institution
3. Appointing a team leader

3.1 Appointing a team leader

3.2 Appointing a team leader
3.3 Appointment form

**Responsibilities of the home institution and of the CERN team leader**

The institute representative signing the form must be someone other than the appointed team leader or deputy team leader.

**Agreement of the spokesperson or contact person at CERN**
4. Home Institution Declaration

4.1 Home Institution Declaration
4.2 Home Institution Declaration

The home institution is responsible for providing a Home Institution Declaration to all its collaborators coming to work at CERN as associated members of the personnel.

NOTE: the candidate cannot be “employed by”, “studying at”, or “in receipt of a grant from” CERN.

Tick only one box and specify the name of the institution.

NOTE: crossing out any text invalidates the declaration.

The document is valid for six months following the date of signature.

A handwritten signature is required.

Full name of the institution representative

Not mandatory

Full title of position at the home institution

NOTE: The signature of the team leader is not accepted here unless they hold a high-level managerial position at the institute or the institute provides CERN with a letter of delegation of authority.
5. Responsibilities of the team leader

5.1 Responsibilities of the team leader
5.2 My responsibilities as a team leader

Towards CERN, on behalf of my home institution, My responsibilities as a team leader are

- Integration of team members
- Communication between CERN and the home institution
- Administration
- Data update & verification in the CERN experimental programme
- Safety correspondent's duties, in collaboration with the institute's Safety Correspondent

NOTE: I, as a team leader, may have been given additional responsibilities by the institution.
5.3 Additional responsibilities for Team Leaders appointed as Safety Correspondent for their institute

In accordance with the CERN Safety Rules, each collaborating institution must appoint and be represented at CERN by at least one Safety Correspondent. Should the appointed Safety Correspondent also hold a Team Leader role, a Safety Correspondent Appointment Form should be completed (as this role is not automatically attributed to the Team Leader).

The additional responsibilities for Team Leaders appointed as Safety Correspondent for their institute are:

- Ensure that team members are informed about CERN’s Safety Policy and Safety Rules
- Follow-up on CERN requests in safety matters, e.g. signature of radiation protection certificates
- Ensure communication between CERN and the home institution on safety matters
5.4 Coordinating safety matters at CERN

Coordinating safety matters at CERN
For me, the team leader

Collaborate on safety matters such as:
- Information
- Communication
- Obligations
- Responsibility towards the team

Additional resources:
- Chapter 6, CERN SR-SO
- Responsibilities and organisational structure in matters of safety at CERN (EDMS 1389540/2)
- Responsibilities of the home institution, the CERN team leader and the safety correspondent (EDMS 2706223/1)
Information

I keep myself and my team informed about the safety aspects related to the activities performed on the CERN site and in any experiments at CERN in which my team participates.
Communication

I ensure communication with the safety officer of the hosting department (DSO) or large experiment (LEXGLIMOS) related to my team and with the HSE (Occupational Health and Safety and Environmental Protection) unit.
Obligations

I assess and provide the means necessary for my team members to fulfil their obligations in safety matters, thereby contributing to improving safety.
Responsibility towards the team

Coordinating safety matters at CERN

For me, the team leader

Collaborate on safety matters such as:

- I ensure that my team members:
  - are informed about CERN's safety policy, rules and best practices;
  - comply with instructions in safety matters;
  - complete the mandatory safety courses and obtain the necessary certificates;
  - establish and update safety files and folders as required.

Additional resources:
- Chapter 6, CERN SR-SC
- Responsibilities and organisational structure in matters of safety at CERN (EDMS 13895-00/2)
- Responsibilities of the home institution, the CERN team leader and the safety correspondent (EDMS 270622/3)

Responsibility towards the team

I ensure that my team members:

- are informed about CERN's safety policy, rules and best practices;
- comply with instructions in safety matters;
- complete the mandatory safety courses and obtain the necessary certificates;
- establish and update safety files and folders as required.
5.5 My role in communication

- Information about my team members
- Changes related to my home institution
- Contact details of my home institution
5.6 Grey book

Team leaders ensure that the information about their home institution and their team members is up to date in the database of the CERN Experimental Programme, also known as the “Greybook”.

https://greybook.cern.ch
6. Before Team Members arrive

6.1 Before team members arrive at CERN
6.2 Pre-register team members

The **EDH Pre-Registration form** is used to pre-register PARTs (External Participants in an Experiment) as well as Users, COAS (Cooperation Associates) and VISCs (Visiting Scientists).

The dedicated help page will guide you through the pre-registration process.

The **EDH Pre-Registration form** is used to pre-register Users, COAS (Cooperation Associates), VISCs (Visiting Scientists) as well as PARTs (External Participants in an Experiment).

The dedicated help page will guide you through the pre-registration process.”
6.3 Pre-register Team Members

<table>
<thead>
<tr>
<th>USER / COAS / VISC</th>
<th>External participant (PART)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accesses</strong></td>
<td></td>
</tr>
<tr>
<td>• CERN computing account</td>
<td></td>
</tr>
<tr>
<td>• Experiment databases</td>
<td></td>
</tr>
<tr>
<td>• Physical access</td>
<td></td>
</tr>
<tr>
<td><strong>Contract</strong></td>
<td>CERN contract of association</td>
</tr>
<tr>
<td><strong>Registration</strong></td>
<td>Remote pre-registration via EDH (PREG) + on-site registration at the Users Office upon arrival at CERN</td>
</tr>
<tr>
<td><strong>Documents</strong></td>
<td></td>
</tr>
<tr>
<td>• Copy of passport</td>
<td></td>
</tr>
<tr>
<td>• Home Institution Declaration (HID)</td>
<td></td>
</tr>
<tr>
<td>• EDH (PREG)</td>
<td></td>
</tr>
<tr>
<td>• If applicable: visa + invitation letter</td>
<td></td>
</tr>
</tbody>
</table>

**USER/COAS/VISC**

**Accesses**
- CERN computing account
- Experiment databases
- Physical access

**Contract**
CERN contract of association

**Registration**
Remote pre-registration via EDH (PREG) + on-site registration at the Users Office upon arrival at CERN

**Documents**
- Copy of passport
- Home Institution Declaration (HID)
- EDH (PREG)
- If applicable: visa + invitation letter
## Pre-register team members

### USER / COAS / VISC vs PART

<table>
<thead>
<tr>
<th>Accesses</th>
<th>External participant (PART)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CERN computing account</td>
<td>• CERN computing account</td>
</tr>
<tr>
<td>Experiment databases</td>
<td>• Experiment databases</td>
</tr>
<tr>
<td>No physical access</td>
<td>• No physical access</td>
</tr>
</tbody>
</table>

| Contract          | No CERN contract |

| Registration      | Remote pre-registration via EDH (PREG) |

<table>
<thead>
<tr>
<th>Documents</th>
<th>Copy of passport</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PREG (EDH)</td>
</tr>
</tbody>
</table>

### Accesses
- CERN computing account
- Experiment databases
- No physical access

### Contract
No CERN contract

### Registration
Remote registration initiated by either the secretariat of the experiment/group or the team leader

### Documents
- Copy of passport
- PREG (EDH)
6.4 Visa requirements

A New user comes to CERN.
Do they need a visa for Switzerland or France?
(i.e. NON-EU citizen)

https://usersoffice.web.cern.ch/visa-requirement-and-procedure
Invitation letter

Visa requirements
A Visa is needed

The team leader requests an **invitation letter** from the experiment's secretariat.

If a visa is not needed
The team leader requests an invitation letter from the experiment's secretariat.
Stay

Visa requirements
A Visa is needed

Three months or less (short-stay C visa)
Team member obtains an official invitation letter + "convention d'accueil" from the secretariat.
> Goes to Swiss or French consulate

How long will the team member stay?

More than three months (long-stay D visa)
Team member obtains an official invitation letter from the secretariat.
If the user stays in France, a "note verbale" is sent to the French authorities.
> Goes to Swiss or French consulate
  > The user will be able to request a Swiss or French permit once in the local area of CERN.
Full registration

Visa requirements

Full registration procedure:

• Pre-registration (EDH PREG)
• Home Institution Declaration (HID)
• Passport
+ The team member registers in person at the Users Office.
6.5 Calculating the length of stay

The length of a team member’s stay at CERN is important as it will determine whether the contract of association is short-term or long-term.
Short-term registration

Calculating the length of stay

The length of a team member’s stay at CERN is important as it will determine whether the contract of association is short-term or long-term.

Short-term registration
Can not be extended.
New EDH PREG mandatory if presence at CERN is extended.
Long-term registration

Calculating the length of stay

The length of a team member’s stay at CERN is important as it will determine whether the contract of association is short-term or long-term.

Minimum 3 months, maximum 3 years > Average presence at CERN: from 5% to 100%

Long-term registration

Minimum 3 months, maximum 3 years > Average presence at CERN: from 5% to 100%
6.6 Calculating the average presence

Notes:

Calculation follows Host States’ regulations and is not a mathematical calculation

6 months + 1 day during the year is 55%

3 months + 1 day consecutively is 55%

Between 55% and 100%, Swiss and French cards are issued.

NOTE: CERN must be notified of any subsequent changes to a user’s annual average presence via EDH (Contract Amendment form) within 30 days. See more about contract amendment later in this course.
6.7 Work permit and residence permit

The CERN sites straddle the French–Swiss border. Team members therefore need a permit from both Host States to work at CERN and a residence permit for the country in which they reside.
Swiss card

Work permit and residence permit
Why is the annual average presence at CERN so important?

The CERN sites straddle the French – Swiss border. Team members therefore need a permit from both Host States to work at CERN and a residence permit for the country in which they reside.

Work permit for CERN users living in Switzerland.

**NOTE:** Generally the same expiry date as the CERN contract.

Swiss card

Work permit for CERN users living in Switzerland.
FI card

Work permit and residence permit
Why is the annual average presence at CERN so important?

The CERN sites straddle the French–Swiss border. Team members therefore need a permit from both Host States to work at CERN and a residence permit for the country in which they reside.

Residence permit for CERN users living in France.

FI French card
Residence permit for CERN users living in France.
**EF card**

**Work permit and residence permit**

Why is the annual average presence at CERN so important?

The CERN sites straddle the French – Swiss border. Team members therefore need a permit from both Host States to work at CERN and a residence permit for the country in which they reside.

![Swiss card](image1.png) ![French card](image2.png) ![EF French card](image3.png)

Work permit for CERN users living in Switzerland.

**EF French card**

Work permit for CERN users living in Switzerland.
6.8 Work Permit and Residence Permit

**Work permit and residence permit**
Which cards do you need to apply for?

- **USER living in Switzerland**
  - Swiss card
  - EF French card

- **New USER**
  - Swiss card
  - Fi French card

- **Family Members**
  - Swiss card
  - Fi French card
6.9 Convention d’accueil

Convention d’accueil
(Hosting agreement)

https://usersoffice.web.cern.ch/forms-and-templates

Users from outside the European Economic Area or Switzerland with a ≤50% average presence at CERN are not eligible for French and Swiss cards (work and residence permits).

The “convention d’accueil” should be requested from the secretariat of the experiment/group Secretariat and provided to the Users Office upon registration or in the ten days following arrival.

Original document duly dated and signed by the user.

https://usersoffice.web.cern.ch/forms-and-templates

Users from outside the European Economic Area or Switzerland with a ≤50% average presence at CERN are not eligible for French and Swiss cards (work and residence permits).

They are nevertheless required to be in possession of a hosting agreement, known as a “convention d’accueil”, which serves as a work permit for France.

The “convention d’accueil” should be requested from the secretariat of the experiment/group and provided to the Users Office upon registration or in the ten days following arrival.

Original document duly dated and signed by the user.
7. The team leader administrative duties while team members are at CERN

7.1 While team members are at CERN
7.2 Registration formalities and integration

Integration

Ensure their integration

You, as team leader, are here to ensure that your team members integrate into CERN life and life in the local area.

https://usersoffice.web.cern.ch/
Help with administrative formalities

You, as a team leader, are here to help your team members with the administrative formalities pertaining to their contracts of association.

https://usersoffice.web.cern.ch/other-formalities
https://usersoffice.web.cern.ch/settling-in
7.3 Integration at CERN

Your role as team leader is to inform your team members about CERN rules and regulations, as well as about the services in place to support them.
Integration at CERN

Information overview

Your role as team leader is to inform your team members about CERN rules and regulations, as well as about the services in place to support them.

Team leader

Team members

- Staff Rules and Regulations
- Code of Conduct
- Data Privacy
- Computing Rules
- Safety and Security Rules

Rules & regulations

- Staff Rules and Regulations
- Code of Conduct
- Data Privacy
- Computing Rules
- Safety and Security Rules
### Representation

**Integration at CERN**

*Information overview*

Your role as team leader is to inform your team members about CERN rules and regulations, as well as about the services in place to support them.

<table>
<thead>
<tr>
<th>Rules &amp; Regulations</th>
<th>Representation</th>
<th>Requirements</th>
<th>Services</th>
</tr>
</thead>
</table>

- ACCU
  (Advisory Committee of CERN Users)
- **Staff Association**
Requirements

- Health insurance
- Social security
- Duty travel
Services

- Ombud
- Diversity & Inclusion programme
- Social Affairs
- Medical Service
- Service Desk
- Onboarding
- Training
7.4 Data Privacy at CERN


Users must comply not only with the data privacy policy of their home institute, but also with that in force at CERN. Note that specific data privacy measures apply to the organisation of events at CERN (whether in-person or online).

1. Take or review the mandatory e-learning on Data Privacy at CERN.
   If you have more questions:
2. Visit the Office of Data Privacy's website.
3. Contact the Office of Data Privacy: privacy.protection@cern.ch
7.5 Duty travel


Should your team members need to travel for official duty purposes on CERN and third-party accounts, the appropriate steps must be followed:

1. Complete the Duty Travel Request in EDH at least 14 days in advance, specifying the budget code.
2. The experiment's secretariat will make travel arrangements (if needed, via CWT). Please note that travellers should not pay for their own travel.
7.6 Health insurance

All users must have health and accident insurance providing adequate cover in Switzerland, France and any countries visited on duty travel for themselves and their accompanying family members.

“Adequate cover” means that cover must include:

- protection against occupational illnesses and occupational accidents;
- all types of illnesses and accidents;
- emergency cases;
- maternity;
- treatment in the event of epidemics and pandemics (e.g. COVID-19);
- mental health (i.e. psychologist and psychotherapy support);
- a sufficiently high limit for maximum medical expenses per case (i.e. at least 500 000 EUR per case).

https://usersoffice.web.cern.ch/health-insurance-information
Diversity and Inclusion

Diversity is one of CERN's core values and should be respected and promoted at all times, in all its forms.

You should be an inclusive team leader and:
- seek and listen to diverse voices
- embrace differences
- create equal opportunities
- ensure fair treatment
- foster a collaborative work environment

Resources on diversity and inclusive leadership available to team leaders:
- Read 5 Disciplines of Inclusive Leadership (14-page whitepaper)
- Watch Inclusion begins with I (3' video)
- Participate in 'Taking the Lead – Creating a culture of respect' (2.5 hour workshop)
7.8 Contract amendment

Contract amendment

For contract extension or amendment use the online Contract Amendment form

Options

• Extension of contract max. 5 years
• Change of average presence at CERN
• Change of institute
• Change of status
  • The abovementioned points require a new HID
• Change of experiment

https://edh.cern.ch/Document/Personnel/UserCheckList

https://usersoffice.web.cern.ch/forms-and-templates
7.9 Change of personal information

Change of family and personal situation
Copy of original document(s) (birth certificate, marriage certificate, decree of naturalisation, copy of passport, etc.).
Official translation of the document(s) in English or French.

Local address change
Swiss and/or French card(s) of the user and family members should be returned to the Users Office, if applicable.

NOTE: CERN must be notified of any changes within 30 days.
8. Admin role of the TL preparing the departure of the TM

8.1 Preparing for a team member’s departure
8.2 Contract termination

https://usersoffice.web.cern.ch/contract-termination-administrative-matters

Your team member should follow the termination procedure and return any items owed: Swiss and French cards, access card, etc.

You should ensure the departure formalities are completed.
8.3 Before the contract end date

You should inform the Users Office and the secretariat of the experiment concerned as soon as you terminate the contract of one of your team members.

You should request the termination of the user's contract.

You may request continued computing access as an external participant for the departing user.
9. Conclusion

9.1 Conclusion

- Establishing a team
- Appointing a team leader
- Home Institution Declaration
- Responsibilities of the team leader
- Before team members arrive at CERN
- While team members are at CERN
- Preparing for a team member's departure
- Conclusion
9.2 Useful resources

Notes:

Team Leaders’ e-learning
You can consult the content of this course at any time via the CERN Learning Hub, even after taking the test.
You can also download the glossary.

Users Office website
The Users Office website contains all the information and latest news you and your team members might need to navigate work and life at CERN.

Team leader FAQ pages
These pages compile the Users Office’s answers to all of your frequently asked questions on the subject of responsibilities, role activation and appointment.

If you can’t find what you’re looking for using the above resources, please contact the Users Office by email or via the Service Portal.
9.3 Thank you for your attention!

To complete this module, please close this window, go back to the ‘MY LEARNING’ page and click on ‘Exam(s)’.

To complete this module, please close this window, go back to the “My Learning” page and click on “Exam(s)”.

61