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

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
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

- Establishing a team
- Preparing 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
5.2 My responsibilities as a team leader

Integration of team members

Communication between CERN and the home institution

Administration

Data update & verification in the CERN experimental programme

Safety correspondent’s duties

NOTE: I, as team leader, may have been given additional responsibilities by the institution.
5.3 Safety correspondent’s duties

Communicate with the team leader

Ensure communication between CERN and the home institution on safety matters

Ensure that team members are informed about CERN safety policy and safety rules

Follow up on CERN requests in safety matters, e.g. signature of radiation protection certificates

NOTE: I, as a team leader, or my deputy team leader may be appointed as safety correspondent.
5.4 Special notice of safety at CERN

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

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

My role in communication
Between CERN and my home institution

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

step 1

The PRT client generates a new pre-registration form

- They can delegate the role to a trusted person
Step 2

The PRT client

Fills in mandatory fields and saves

or

Shares the registration form with the user
Step 3

The PRT client Completes the form and uploads the required documents

or

The new user Provides personal information and uploads the required documents
Step 4
The PRT client Verifies the information and clicks on “Mark ready”.

Step 5
The Team Leader Checks the information and clicks on “Sign & send”.
Step 6

The Users Office Receives and checks the registration form.
Step 7

The Users Office Informs the PRT client if the form is incorrect. The PRT client clicks on “Clone” and restarts from step 2.

The Users Office Informs the PRT client and the new user if the form is correct.
Step 8

New user

Activates their computing account via the service desk
Follows the online safety & computing courses
Obtains a visitor pass at Building 33 (CERN reception) to enter the site
Comes to the Users Office for final registration
Collects their access card from Building 55
Visits their experiment's secretariat (office allocation, keys, etc.)
### 6.3 Pre-register Team Members

#### USER/COAS/VISC

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

**Contract**
CERN contract of association

**Registration**
On-site registration at the Users Office upon arrival at CERN (following remote pre-registration)

**Documents**
- Copy of passport
- Home Institution Declaration (HID)
- PRT
- If applicable: visa + invitation letter

#### External participant (PART)

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

**Registration**
On-site registration at the Users Office upon arrival at CERN (following remote pre-registration)

**Documents**
- Copy of passport
- Home Institution Declaration (HID)
- PRT
- If applicable: visa + invitation letter
## PART

### Pre-register team members

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<tr>
<th>USER / COAS / VISC</th>
<th>External participant (PART)</th>
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<td>Accesses</td>
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<td>CERN computing account</td>
<td></td>
</tr>
<tr>
<td>Experiment databases</td>
<td></td>
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<tr>
<td>No physical access</td>
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### PART

**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)
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

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.

How long will the team member stay?

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

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

Full registration procedure:
Pre-registration (PRT)
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.

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Short-term registration

Not renewable.

New PRT mandatory if presence at CERN is extended.
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.

Swiss card

Work permit for CERN users living in Switzerland.

NOTE: Generally the same expiry date as the CERN contract.
**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  
Fi French card  
EF French card

Residence permit for CERN users living in France.

Fi card

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?

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Swiss card
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EF French card

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

USER living in France

Swiss card
Fi French card

Family Members

Swiss card

Family Members

Fi French card
6.9 Convention d’accueil

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

While team members are at CERN

- Establishing a team
- Appointing a team leader
- Home Institution's Contribution
- 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
7.2 Registration formalities and integration

Integration

Ensure their integration
You, as a 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.
Rules & regulations

Integration at CERN

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

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<th>Integration at CERN</th>
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<td>Team leader</td>
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<th>Requirements</th>
<th>Services</th>
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- ACCU (Advisory Committee of CERN Users)
- Staff Association

Representation

- 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. Create a profile in Traveldoo (CERN’s online booking tool).
3. The experiment’s secretariat will make travel arrangements via CWT or Traveldoo. 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
7.7 Diversity and Inclusion

Diversity and Inclusion

https://diversity-and-inclusion.web.cern.ch/

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 white paper)
- Watch Inclusion begins with I (3’ video)
- Participate in 'Taking the Lead' – Creating a culture of respect (2.5 hour workshop).

https://diversity-and-inclusion.web.cern.ch/

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7.8 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
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)’.

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