

Management System:	Partnerships (M12)	NUMBER:	M12-2504
Management System Owner:	Manager, Office of Partnerships and Technology Transfer	REVISION:	2
Title:	Establishing New User Accounts – General Users	EFFECTIVE:	

1.0 Purpose

Individual users and User Institutions may request the establishment of user accounts between Fermilab and the User Institution. The primary purpose of the user account is to support the user's costs associated with transportation to and from Fermilab and presence for the participation on experiments and/or projects while on-site. User accounts must be established before the individual user can begin utilizing these services. This procedure explains the process the individual user, User Institution, and Fermilab's Sponsored Programs and Corporate Accounting (SPCA) group executes in order to establish user accounts.

2.0 Procedure

- 2.1 The individual user or the User Institution will request establishment of a user account by completing **Form M12-2500-C, Fermilab User Account Form**.
- 2.2 The completed Fermilab User Account Form is electronically sent to SPCA. Upon receipt, SPCA determines if a user account already exists for the User Institution and requests additional information from the individual user or User Institution as necessary.
- 2.3 SPCA proceeds to verify if a Non-Proprietary User Agreement (NPUA) is in place with the User Institution, utilizing the Affiliations Database, the online list of approved non-proprietary user agreements, or by contacting the Office of Partnerships and Technology Transfer (OPTT).
 - 2.3.1 If SPCA determines an NPUA is not in place, or that the current agreement will be expiring within 6 months, or that the current agreement will expire prior to the end of the expected purchase order from the User Institution, SPCA will notify OPTT that a new or renewed NPUA is required to establish the requested user account.
 - 2.3.1.1 OPTT executes either the process for **Establishing Non-proprietary User Agreements with Institutions (M12-2503)**, or **Renewing Non-Proprietary User Agreements (M12-2505)** as applicable.
 - 2.3.1.2 Once completed and a valid NPUA is in place for the User Institution, OPTT forwards a copy to SPCA for their file.
 - 2.3.1.3 If OPTT determines that an NPUA cannot be renewed or a new one cannot be approved for the User Institution, then SPCA is notified and SPCA will notify the User Institution that the request for a user account is rejected.
 - 2.3.2 If SPCA determines a valid NPUA is in place, or after receiving a new or renewed agreement from OPTT, SPCA sends communication to the User Institution requesting a Purchase Order (PO) or other financial instrument be created.
 - 2.3.2.1 The communication should include the following text:
Effective October 1, 2015, a Non-Proprietary User Agreement (NPUA),

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signed by the appropriate institutional officer at the user’s institution, became a prerequisite for establishing and/or renewing a user’s financial account here at the Fermilab National Accelerator Laboratory (Fermilab). This is a standard, non-negotiable agreement form established by the United States Department of Energy for all national laboratory user facilities, which includes the user facility at Fermilab. The NPUA constitutes the terms and conditions for user institutions’ presence or work at the Fermilab site and the agreement for Fermilab to invoice for charges related to the user-incurred expenses. This document will serve as the sole terms and conditions for your institution’s purchase order related to the user account. Fermilab cannot accept a purchase order that incorporates other terms and conditions.

2.3.2.2 SPCA may require advance deposits or payments in situations where Fermilab does not have prior experience with a particular User Institution or where an existing User Institution has a prior history of late payment.

- 2.4 The User Institution proceeds to generate a PO or other financial instrument and sends it to SPCA.
- 2.5 SPCA receives the valid PO or financial instrument from the User Institution and then follows up with the individual user if necessary to resolve any questions about the PO.
- 2.6 SPCA establishes a project and task number and determines if the individual user is eligible to use an existing ProCard (refer to Fermilab’s Procurement Card (ProCard) Users’ Guide.)
- 2.7 SPCA notifies the individual user, providing them with further instructions, the project and task number, related travel code, and requests a list of signatory authorities from the User Institution for the user account.
- 2.8 The individual user proceeds to utilize Fermilab’s services with the established project/task and provides SPCA with the list of any additional signatory authorities from their User Institution. Typical Fermilab services an individual user can utilize includes but are not limited to:
 - Housing for individual users who are approved to work at the Laboratory.
 - Travel services related to work performed at Fermilab (e.g. airfare, car rental, hotels, transportation to and from airport) (refer to Fermilab’s [Complete Guide to Official Laboratory Travel](#).)
 - Stock room (e.g. paper, supplies, chemicals, gases, freight services)
 - Procurement
 - Trade services (e.g. Machine Shop, Electrical, etc.)
 - Copying/Duplicating
 - Visual Media services (e.g. photographs, posters, etc.)

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- Shipping and Receiving
- 2.9 After the individual user has begun using Fermilab’s services, the monthly invoicing procedure is initiated as applicable. Money is collected from the User Institution by the Accounts Receivable (A/R) function within SPCA.
- 2.9.1 If the invoicing procedures are initiated and the User Institution is paying invoices on time, then the individual user can continue to perform work at the Laboratory with no additional controls.
- 2.9.2 If the invoicing procedures are initiated and the User Institution is delinquent in paying invoices, SPCA may issue a stop-work order and the individual user must stop all work at Fermilab until all accounts have been paid up to date. Stop-work orders are also communicated to the Field Financial Manager, Division/Section/Project Head, and OPTT.
- 2.10 As necessary, User Institutions may renew the PO or financial instrument as needed and keep the user account open until work is completed at Fermilab or the existing NPUA expires, whichever comes first.

Process Map (see following pag

