Agenda

• Introduction
• Roles
• Overall process
• Contingent Coordinator Task
• Questions
# Site access and badging roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Individual who accesses Fermilab facilities and resources for the purpose of advancing the scientific mission of the Laboratory and whose work generally requires unescorted and/or after-hours access to non-public access areas (DOE-Approved User Facility and/or non-User Facility resources). Users require safety training to perform work, and a Fermilab ID badge and/or access to Fermilab networks or systems. Users can receive payments or reimbursements from Fermilab, which include individuals participating in reviews or committee meetings.</td>
</tr>
<tr>
<td>Sub-Contractor</td>
<td>Individual who accesses Fermilab facilities and resources working via a Procurement-managed subcontract with FRA. Subcontractors require subcontractor training to perform work, and a Fermilab ID badge. Subcontractors include individuals who consults on behalf of the Laboratory.</td>
</tr>
<tr>
<td>Authorized Guest</td>
<td>Individual who does not have business with the laboratory but is approved to access select Fermilab facilities, such as the Fermilab Children’s Center, Fermilab Village Housing, or Recreation Center.</td>
</tr>
<tr>
<td>Fermilab Point of Contact (POC)</td>
<td>FRA employee, user or sub-contractor responsible for confirming an individual's affiliation with Fermilab and home institution.</td>
</tr>
</tbody>
</table>
## Site access and badging roles continued

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Users Office</td>
<td>FRA team responsible for onboarding Users.</td>
</tr>
<tr>
<td>Badging Office</td>
<td>FRA team responsible for onboarding Sub-Contractors, Authorized Guests, and providing badges to all workforce.</td>
</tr>
<tr>
<td>Foreign Visit Assignment (FVA)</td>
<td>FRA team reviewing access request for non-US citizens.</td>
</tr>
<tr>
<td>Export Control (EC)</td>
<td>FRA team reviewing export controls for non-US citizens.</td>
</tr>
<tr>
<td>Agreements Manager</td>
<td>FRA team ensuring an agreement is in place for a home institution.</td>
</tr>
<tr>
<td>Institution Manager</td>
<td>FRA team managing details of Home Institution list.</td>
</tr>
<tr>
<td><strong>Contingent Coordinator</strong></td>
<td>FRA employee in lab organization responsible for validating sub-contractor information is accurate. Handles exceptions for contingent workers in ServiceNow (SNOW).</td>
</tr>
<tr>
<td>Affiliation Approver/Computing</td>
<td>FRA-approved individual (e.g., Spokesperson, Division/Section Head, etc.) who is accountable for verifying the identity and information of an individual requesting access (physical and/or remote) prior to approving Fermilab access. Approvers are required to develop and follow their experiment, project, or division/section approver verification process.</td>
</tr>
<tr>
<td>Validator</td>
<td></td>
</tr>
<tr>
<td>Contract Approver</td>
<td>FRA employee in lab organization responsible for approving the Sub-Contractor.</td>
</tr>
<tr>
<td>Security Communication Center</td>
<td>Fermilab team responsible for providing access to buildings and locations.</td>
</tr>
</tbody>
</table>
Terminology

• Access Request – form required for a person that is not an employee to gain access to Fermilab resources
• Affiliation – Fermilab organization, experiment, collaboration, or project that accepts contingent workers.
• No PO Affiliation – This is an external lab association added to the affiliations database that has been created specifically for those sub-contractors that don’t necessarily have a purchase order. Examples are Fermilab Natural Areas, AbriCU, and others
• Sub-Contractor Supervisory organization – FermiWorks supervisory organization structure for sub-contractors
Overall Process

User Perspective

**Step 1:** User enters basic visit information into portal

**Step 2:** User submits their sensitive data

**Step 3:** User receives info for Access, Badging, and Training

- Initial Info Submitted
- Request For Detailed Info
- Verified
- Complete

**Workflow**
- Processing Rules
- Execute Business Processes
- Record Approvals
- Send notifications

User, Contractor, Authorized Guest
Sub-contractor Process Workflow

1. Access Request Sub-contractor
2. POC Approval
3. Contingent Coordinator Task
4. Sub-contract Approvers

Continue Workflow steps:
- FVA
- Export Control
- Workday
- Accounts
- Badge
Important Data

- FermiWorks sub-contractor supervisory organization
  - Role of Contingent Coordinator is managed in FermiWorks by Global Services

- Lab Organization Affiliation
  - Contract approvers
  - Sub-contractor supervisory organization needs to be populated in the affiliation with the value to auto-assign the request to Contingent Coordinator
Demo – Use Cases

- Sub-contractor – US Citizen – Onsite – No accounts
- Sub-contractor – Non US Citizen – Onsite – w/Accounts
- Sub-contractor – Non US Citizen – Offsite –w/Accounts
- Sub-contractor – US Citizen - No PO

- TRN URL to Access Request form: (To TEST)
  - https://fermitrn.servicenowservices.com/expert_shell.do?sysparm_sys_id=63f9f6a8dbd148104e65ff621f961975
- ServiceNow TRN link
  - https://fermitrn.servicenowservices.com/
Contingent Coordinator Task Email

- The system will auto-assign the Task to a Contingent Coordinator based on which organization was selected on the access request
- An email will be sent to Contingent Coordinators based on affiliation

1. Click the Task number link in the email
2. ServiceNow Classic View
   a) Home Page – My Work Page
   a) Tasks assigned to me
   OR
   b) Left navigation menu
   go to Request – Catalog Task – Assigned to me

Catalog Task TASK0174377 has been assigned to you

---PLEASE REPLY ABOVE THIS LINE---

Katie,

Catalog Task TASK0174377 created at 2020-08-28 16:03:32 CDT has been assigned to you.

Short Description: Review purchase order information
Assignment Groups: Contract approve/ PO validator
Summary:

Requested Item Details:
Reason for access request
Have you had a Fermilab computing account or ID badge before? No
First name
Middle initial
Last name
Primary email address
Country code
Area code
Phone number
Affiliation
Supplier country
No PO
Point of contact
Will you need a Fermilab computing account? No
Will you be coming onsite to Fermilab? Yes
From
To

10/29/2020 Site Access and Badging - Contingent Coordinator Training
My Work Page – Contingent Coordinator Dashboard

- Classic view of ServiceNow - type Dashboards in the left navigation search. Click on Dashboards menu item, then click on the Contingent Coordinator Dashboard.

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Contingent Coordinator Dashboard

My Contingent Coordinator Reviews

<table>
<thead>
<tr>
<th>Number</th>
<th>Assigned to</th>
<th>Opened</th>
<th>Short description</th>
<th>State</th>
<th>Last Updated</th>
<th>Last Updated by</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
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</tr>
</tbody>
</table>

No records to display

Open Contingent Coordinator Reviews

<table>
<thead>
<tr>
<th>Number</th>
<th>Assigned to</th>
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</tbody>
</table>

Contingent Coordinator Reviews closed in last 30 Days

<table>
<thead>
<tr>
<th>Number</th>
<th>Parent</th>
<th>Short description</th>
<th>State</th>
<th>Closed by</th>
</tr>
</thead>
<tbody>
<tr>
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Contingent Coordinator task in ServiceNow

If you want to access the Task from the RITM, you can find it under the Catalog Task tab near the end of the RITM.
Contingent Coordinator Task detail in ServiceNow

- Open the Task
- Go to the Variables section
- Review the person information

Access Request
- Reason for access request: Sub-Contractor - Work at Fermilab via a Procurement-managed subcontract with the

Personal information
- Person
- First name: Tammy
- Middle initial: A
- Last name: Justine
- Primary email address: tjjust@email.com
- Country code: 1
- Area code: 312
- Phone number: 232399
- Person position
Contingent Coordinator Task detail in ServiceNow

- Go to the Affiliation and Purchase Order section
- Update Affiliation
- If needed update Supervisory org to be the sub-contractor org you want this person in FermiWorks
- Verify Purchase Order information
  - To update, type new PO or search with magnifying glass
  - Click ‘i’ to view details of the PO
  - Click ‘i’ to review the country selected for the supplier
Contingent Coordinator Task detail in ServiceNow

- Review onsite access information and make sure end date does not exceed contract dates

On-site Dates
- From: 2020-10-15
- To: 2021-10-15

On-site Location
- What Fermilab business site will you be located at?
  - Batavia, Illinois

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Fermilab
Contingent Coordinator task detail in ServiceNow

Review company information and update if needed

Once review is complete, Click ‘Close Task’ button at top
Reassign task to a different Contingent Coordinator

If for any reason (vacation, work schedule, etc.) you need to reassign the task to a different contingent coordinator

- Open the Task
- Click on the “Assigned to” field where it has your name
- Type in the contingent coordinator’s name you would like the Task reassigned to
- Click the Save & Exit button in the top right corner
- The other contingent coordinator will receive a notification that the Task has been assigned to them
Sub-Contract Approvers are next in the process

Sub-Contract approvers have been identified for each lab organization in the affiliation database. Their approval grants the sub-contractor access to Fermilab resources.

Example email

Requested Item RITM0900233 Approval Request

To: Tammy

Your approval/rejection is required on the following Requested Item. Please review this request and use the links below to take the necessary action.

Requested Item Details:
Requestor: Tammy Whited (admin)
Reason for approval/rejection:  
Requested Item Description: Authorized guest access request

Requested Item: Authorized guest access request

Requested for: Tammy Whited (admin)

Reason for visit to Fermilab: Housing

Requested Date: 2020-08-25

To:

First Name: Justin
Middle Initial: NM
Last Name: Time
Primary Email: itime@email.com
Country Code: 1
Area Code: 312
Phone Number: 3343333
Gender: Male

Add reason for rejection

Link to send email Approval

Link to send email Rejection.
How to find where the Access Request is in the process

In tabbed section of the Request Item – Go to RITM Workflow Activities to see what step the process is executing
# Sub-contractor form guidance

<table>
<thead>
<tr>
<th>Fields</th>
<th>Definitions/additional information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-contractor’s full name and email address</td>
<td>The email should be the sub-contractor’s individual email so they can directly receive instructions for next steps.</td>
</tr>
<tr>
<td>Sub-contractor’s phone number</td>
<td>The phone number must have a valid country and area code. Country code for United States is ‘1’.</td>
</tr>
<tr>
<td>Sub-contractor’s country of citizenship and birth</td>
<td>List all citizenships. If not a U.S. citizen, select Legal Permanent Resident status</td>
</tr>
<tr>
<td>Point of contact name</td>
<td>Must be an active Fermilab badge-holder</td>
</tr>
<tr>
<td>Fermilab division or section affiliation</td>
<td><strong>POC may need to provide</strong></td>
</tr>
<tr>
<td>PO number</td>
<td><strong>POC may need to provide</strong></td>
</tr>
<tr>
<td>Reason for visit</td>
<td>Description of work to be performed</td>
</tr>
<tr>
<td>Select if the sub-contractor will need computing access</td>
<td>If yes, access dates cannot exceed one year</td>
</tr>
<tr>
<td>Select if the sub-contractor will be onsite at Fermilab</td>
<td>If yes, access dates cannot exceed one year</td>
</tr>
<tr>
<td>If coming onsite, select primary work location</td>
<td>Fermilab building and floor <strong>POC may need to provide</strong></td>
</tr>
<tr>
<td>Company contact/manager name, company email, and company phone number</td>
<td>The phone number must have a valid country and area code. Country code for United States is ‘1’</td>
</tr>
<tr>
<td>Emergency contact name, relationship, email, and phone number</td>
<td>This is a personal contact that Fermilab will contact in case of emergency (e.g. the sub-contractor’s spouse, family member, or friend)</td>
</tr>
</tbody>
</table>
Sub-contractor Access Request - Purchase Order section

**Affiliation**

* Enter the Purchase order number for your contract.

**More information**

Only enter the Purchase Order number Ex: 12345

635995

☐ No PO

* What is your Fermilab Experiment, Project, Division, or Section affiliation? If you are unsure, ask your Fermilab contact.

COMPUTING-CORE COMPUTING DIVISION

* Point of contact: Your Fermilab contact is the person you will be reporting to once on-site

Tammy Whited
Sub-contractor Access Request - Company Information

**Company Information**

- **Company contact/Manager name**
  - Tammy Manager

- **Company email**
  - tmanager@email.com

Please enter your phone number along with the country and area codes.

- **Country code**
  - 1

- **Area code**
  - 312

- **Phone number**
  - 4435500
Questions and Answers from Training Session

Q: What if there are technical capability issues with contracted employees? Meaning they don't have email or computer to complete the Access Request Form or Workday portion.

A: The sub-contractor company needs to assist their staff in completing the forms and help provide an email.

Q: Site Services is currently filling out the Access Request Form. Should we continue to do this or is up to the vendor to help their employees?

A: It is up to the vendor to help their staff; however, you can offer to assist as they fill out the form.

Q: What if the contingent coordinator is on vacation? Can you reassign your tasks to another contingent coordinator?

A: Yes, if the backup is identified as a Contingent Coordinator in FermiWorks for that sub-contractor supervisory organization, then in ServiceNow you either re-assign the task to the backup or they will be on the watch list of the task and can view the task in my watched tasks.
Questions and Answers from Training Session

Q: If there is more than one Contingent Coordinator for organization and all receive the notification, is there still need to delegate to them?
A: Not necessarily, that will depend on your division/section process.

Q: Does this list check if a PO is going to expire?
A: We only check that the PO is active. You should provide the sub-contractor with dates they can enter based on the PO.

Q: Who owns the process after the contingent coordinator approves? Meaning what is the next step in the process?
A: Contract Approvers

Q: Do contingent coordinators get an email if there is a pending task? Also, if there's more than one Contingent Coordinator for an organization, in what order are tasks assigned to coordinators?
A: Yes, you will get an email. If there is more than one person, the task gets assigned to the first on the list and the rest of the people are added to the watchlist and are copied on the email.

Q: Is this is replacing guest/visitor process?
A: Yes.
Questions and Answers from Training Session

Q: What if the contingent coordinator is out of the office?
A: You can reassign your tasks to another contingent coordinator, or a contingent coordinator in your group can look at and work your tasks while you’re gone. You should designate a backup to cover for you if you are not available.

Q: Does this system integrate with the essential personnel list to allow people onsite?
A: No. Anyone coming onsite should follow the current process to request access. This process does not add them to the list.

Q: Do contingent coordinators get an email if there is a pending task?
A: Yes, you will get an email and a weekly reminder if you have a pending task.

Q: Is the PO list on the access request form updated in real time?
A: Yes, it is updated from EBS so it should be accurate and up to date.

Q: How can a contingent coordinator check a PO?
A: You can go to the PO Lookup or Web Query on finance site to look at requisitions and PO numbers.

Q: How far in advance should we have the contractor complete this form?
A: At least a few days but it could take up to 4 weeks to process a non-US citizen. There needs to be time for the request to get through the different approvers and time for the contractor to add their information into FermiWorks.
Helpful Links

- Access Changes information about Nov. 3 rollout –
  - [https://get-connected.fnal.gov/accesschanges/](https://get-connected.fnal.gov/accesschanges/)
- [https://fermi.servicenowservices.com/](https://fermi.servicenowservices.com/)
- Access Request Form Reference Guide
- Site Access and Badging FAQ
- Sub-Contractor & Authorized Guest Access Page
- User Access Page
- Housing Office Page