

Visitors Engaged in Research
Packet Completion Instructions
Updated: 6/16/2022

Note: If this is the first time your college/department is submitting a packet, please contact Mary Jourdan at visitingresearcher@utk.edu to set-up a One Drive folder.

1. Visit <https://research.utk.edu/oried/research-integrity-and-assurance/visitors-engaged-in-research/>, on the right-hand side of the page you will see **Visitor Information Packet** - click on the link to download the packet. **Note: Please visit the website to download the packet each time you have a new visitor to ensure you are using the current version.** The Packet Completion Instructions link is also located on the webpage. Review the instructions before completing the form.
2. Review the packet and packet completion instruction, then **gather** the required information and documentation. Items needed are:
 - a. Visitor's name and email address
 - b. Visitor's Information Packet (blank)
 - c. Visitor's CV
 - d. **For foreign visitors, a copy of the passport and/or visa**
3. Assemble blank visitor's information packet, CV, passport and/or visa into **one PDF document** ("packet") and save.
4. Email packet to Visitor with instructions to complete their portion on pages 1, 2, & 5. Visitor digitally signs pages 4 & 6*.
 - a. ****If the Visitor's home institution/organization is Oak Ridge National Laboratory or Y-12, Visitor does not complete page 5 or sign page 6.***
 - b. **HELPFUL TIP – Page 2 can be completed by the Visitor, Faculty Sponsor, or both**
5. Visitor returns completed and signed packet to Business Manager.
6. Business Manager reviews packet to determine if a background check is required.
7. If the Visitor has a social security number, a background check is required*. The Business Manager initiates a background check through the university's automated background check request system at <https://hrbackground.utk.edu/>. For additional instructions on how to use the system and submit requests, please visit <https://hr.utk.edu/background-check-requests/>. For questions about the process, contact hrbgc@utk.edu.
 - a. ****Background checks are NOT required if the visitor's home institution/organization is Oak Ridge National Laboratory or Y-12 as they perform their own background checks.***
 - b. **HELPFUL TIP –Business Manager should inform Visitor that Truescreen will contact them via email to complete the background check.**

8. Business Manager emails packet to the Faculty Sponsor with instructions to complete their portion on pages 1 & 2. Faculty Sponsor digitally signs page 4.
 - a. *HELPFUL TIP – Page 2 can be completed by the Visitor, Faculty Sponsor, or both*
9. Once the packet is completed and signed by Faculty Sponsor, either the Faculty Sponsor or Business Manager emails the packet to the Department Head for review and electronic signature on page 4.
10. Department Head emails signed packet to the Business Manager for final processing.
11. Business Manager completes College/Departmental Use Only section and digitally signs page 1.
12. Business Manager uploads packet into appropriate OneDrive folder in file named “Place New Packets for Approval HERE” using link provided by the Office of Research at time of set-up.
13. Business Manager notifies Mary Jourdan via email at visitingresearcher@utk.edu that file has been uploaded and provides the Sponsor and Visitor names.
14. The Office of Research will review the package to ensure it is complete and all signatures have been obtained. If the packet is complete it will be routed to Export Control, Human Resources, Center for Global Engagement, and UT System Research Security for review and digital signature (as applicable).
 - a. If university approvers have questions, they will reach out directly to the Faculty Sponsor and/or Business Manager
15. Once all approvals have been obtained, the packet will be routed to the College Dean (or designee) and UT System Vice President for Research for review, approval and digital signature (as applicable).
16. The Office of Research will notify the Business Manager by email that the final, approved packet is in One Drive.
17. Business Manager enters Visitor in IRIS as a Friend, **Subcategory – Visiting Researcher**.
18. Per the [University of Tennessee System Policy RE0002: Visitors Engaged in Research](#), Business Managers should terminate the Visitor’s IRIS appointment and Net ID access on the Termination Date (see Page 5, Item 7, Access to University Computers, Networks, and Other Information Technology Resources, paragraph b). Please see the policy specifics below:

”The Departmental Business Manager will terminate the Visitor’s IRIS appointment and related Net ID access on the Termination Date. The Sponsor shall notify the Departmental Business Manager if the Termination Date is changed to ensure appropriate termination of IRIS appointment and related Net ID access.”