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Field Research (International) Planning Time-Table

The Field Research Office has created this planning time table as a guideline to facilitate field research. We want to evolve this template based upon the input and feedback of those researchers who use this planning tool.

The timeline recommended here will vary depending upon how remote your research site is and whether you have reasonable access to supplies. The more remote, the more time you should allow for your preparations.

Please note that these recommendations are general and will not be all-inclusive, as this depends upon individual research needs.

8 months Prior to departure (at least)

Is trip possible?

- Research the safety and appropriateness of locations for travel. Go to [Canada's country travel warnings](#) and research where you are going. The pamphlet "[Bon Voyage But...](#)", is also a good resource for Canadian travelers.
- NOTE: The University retains the right to prevent any STUDENT from travelling to areas that are deemed. See the University of Alberta [Off-Campus Activity and Travel Policy](#).

Documents/Visas/Work Permits

- Make sure students and leaders' travel documents are sufficient -- the [IATA](#) has a Travel Centre where you can enter your information (country of origin, passport information, etc.) and it will advise on the documentation needed for a given country. Note: Some countries require a valid passport (that does not expire while out of Canada). Obtaining a passport usually takes at least

2 weeks if you attend in person at Canada Passports Office or 4 weeks if you submit it by mail. Other countries require a visa.

- Note: If any researchers hold non-Canadian passports, ensure they possess appropriate documentation, which may be different than for a Canadian citizen.
- All countries require that one obtains special permission for entry when they plan to work. This permission is called a **visa or work permit**. The following points are important:
- Only the country concerned can provide entry requirements. Some visas can take several **months, thus make inquiries early**.
 - Visit Canada's [Travel Site \(Visas\) site](#) to find out more information on visas and visit their [Travel Reports for each country](#) to gather information if that country will allow Canadians to have visas. Note that visitor's visa MAY NOT be adequate to cover all potential avenues of research, check relative to the work you are doing
 - Obtain the required visa or work permit from that country's embassy or consulate accredited to Canada. Contact information for foreign embassies and consulates in Canada can be found via the [Canadian Government Offices Abroad](#) or their Embassy's Internet Address can be found using [Embassy World](#).
 - Working without an appropriate visa or overstaying a visa is **illegal**; if caught, you may be subject to **imprisonment, a fine and/or deportation**. You may also be barred from re-entry to that country.

Early Planning

- Start drafting your [Field Activities Plan](#) (FAP) which will help you ensure you address issues such as training needs, lodging, equipment, communication needs, emergency response plan, etc.
- Prepare Standard Operating Procedures for things such as vehicles, equipment, communications, risky procedures (e.g. climbing, chainsaw, working with biohazards, etc.).
- Consider your hiring needs if you require additional instructors, assistant leaders, etc. (e.g. do they require specific qualifications and how hard will it be to find one) – consider training needs. If you believe that it will be difficult to find appropriate personnel, begin hiring process now; go to the [Field Research Office's web page for tips on hiring](#).
- Find out about local laws, customs, holidays, seasonal weather issues and time.
- Make initial inquiries for permits, permission requirements, licensing, access to lands, animal use or human ethics approval (animal use takes two months to get back) if needed. [See FRO's web page on Permissions](#) and/or contact the Field Research Office for help with this.
- To avoid unnecessary delays and complications with Canadian and Foreign customs agencies, individuals planning to **travel outside of Canada with accompanying University equipment** should consider the following well in advance of their trips - List of equipment, Export Permits, Customs Documentation, Contacts within the UofA; Customs Division, References. Please see [FRO Travel Page \(Equipment\)](#) for more guidance. Of particular note:
 - a) The destination of the equipment or goods – all equipment or goods destined for countries on Canada's *Area Control List (ACL)* require a permit regardless of the nature of the goods. Currently those countries are: **Belarus; Democratic People's Republic of (North) Korea; and Myanmar (Burma)**.

- b) The country of manufacture of the equipment or goods – all equipment or goods which have been manufactured in the **United States of America** require either an export permit or export authorization:
- c) Export Permit for US Origin Goods and Technologies is required for all equipment or goods destined for: **Cuba, the Democratic People’s Republic of (North) Korea, Iran and Syria**

6 months prior to departure (at least)

Contacts

- Register at the various Canadian Consular Offices abroad in non-EU or North American countries. See [Canada’s Registration for Government of Canada’s Registration for Canadian’s Abroad](#).
- Ensure you have the appropriate contacts for your location
- General – Government of Canada
Tel.: 1-800-267-6788 (in Canada and the U.S.) or 613-944-6788
TTY: 1-800-394-3472 (in Canada and the U.S.) or 613-944-1310
E-mail: travel@international.gc.ca
 - Emergencies – Government of Canada
Tel.: 613-996-8885 (call collect from abroad, where service is available)
E-mail: sos@international.gc.ca

Security & Health

- For more information on travel, visit the [Field Research Office Travel page](#) or call with any questions – 780-492-8981.
- Make sure participants are aware of risks associated with drugs and travel – see Drugs and Travel Information Program www.travel.gc.ca/drugs
- Regularly check the country Travel Reports for vital information on safety and security, local laws and customs, health conditions, and entry requirements for approximately 200 travel destinations. See [Travel Reports and Advisories](#). This information is also available by phone: 1-800-267-6788 (in Canada and the U.S.) or 613-944-6788.
- Check the [Canadian \(GC\) Safety and Security for Canada](#) site. This site has information on health regulations for travelers, passport and custom regulations, safe travel tips, etc.
- Check International Air Transport Association (IATA): [IATA](#) for information on air travel.
- Check vaccination recommendations for your destination(s) and advise all participants. Timelines for some vaccinations can be long. Assess health risks so you can plan accordingly. See [Alberta Health Services](#) for information on travel and to make an appointment with a travel clinic. [International Association for Medical Assistance to Travellers \(IAMAT\)](#) has information on immunizations, vaccinations, disease risks, medical directories world-wide, food and water safety recommendations. You can also sign up for a no cost membership which will create a travel plan for you and will keep track of your trips.
- For other health related travel information and advisories, visit WHO ([World Health Organization International Travel and Health](#)).

Planning

- Make travel arrangements.
- Determine your communication needs – see [Communication page of FRO Website](#) (kind, amounts, cost). FRO now rents satellite phones at very reasonable rates (cost recovery). If you plan to use cell phones or satellite phones, ensure they will work where you are going and know if there will be roaming charges which can be very high depending on your plan. Be aware that it may be useful to purchase inexpensive cell phones and purchase SIM (Subscriber Identity Modules) cards to use in the destination country.
- Draft** a list of equipment you will need to take with you - see [FRO example list of equipment](#). Keep in mind transportation of dangerous goods, transporting insect samples, etc.
- In general terms* **draft** your trip description and itinerary which may include the following:
 - Route (starting and end points)
 - Times of departure
 - Stopping points
 - Return time stopping points
 - Location of trip, including description of terrain
 - Maps (in sufficient detail to be able to locate the group in case of emergency),
 - Activities engaged in during project

*with as much detail as is known at this time and which will be revised and expanded over the next months prior to departure.
- Update Field Activities Plan.
- For international research you will require additional insurance. [See FRO's website Insurance](#) and call the Office of Insurance and Risk Assessment (780-492-8887) for advice as to the kind of insurance you may need and good places to obtain necessary coverage. Some important recommendations for purchasing insurance are:
 - Includes an in-house, worldwide, 24-hour emergency hotline with multilingual operators, as well as physicians or nurses on staff.
 - Covers doctor's visits and prescription medicines.
 - Pays for foreign hospitalization and related medical costs.
 - Provides up-front and direct payment of bills and cash advances abroad, so you don't have to be out of pocket.
 - Covers emergency transportation, such as ambulance services.
 - Provides for medical evacuation/repatriation to Canada or the nearest location with appropriate medical care.
 - Pays for a medical escort (doctor or nurse) to accompany you during evacuation.
 - Covers pre-existing medical conditions (get an agreement in writing that you are covered).
 - Covers premature births and related neonatal care, if needed.
 - Pays for the preparation and return of your remains to Canada if you die while abroad
 - Covers emergency dental care
 - Does not exclude any countries or regions you intend to visit
- If you will be driving vehicles abroad, you can apply for an International Driver's License – see [Canada's FAQ for International Driving License](#) and [Canadian Automobile Association for the IDP Application](#). If you will be driving students (within Alberta) you must obtain an Alberta Class 4

driver's license. A class 4 license is **STRONGLY RECOMMENDED** if driving students outside of Canada. The University will cover the costs of obtaining a Class 4 license. See [U-Drive](#) for more information.

- If you will be hiring drivers abroad, in developing countries, there is little to assure that they will be satisfactorily insured and therefore it is imperative that you have personal injury insurance and no-fault health insurance adequate to cover your own medical care and evacuation.

5 months prior to departure

- Complete hiring process obtaining names and designations of all in research group. Full legal names (name on passport) are required.
- Identify training required for personnel and enroll them in training sessions as necessary. [See FRO training info.](#)

4 months prior to departure

- Contact local officials as necessary and appropriate (ambulance, forestry service personnel, wardens, collaborators, business partners, police) to let them know particulars of your research including the time period and place.
- Find out about currency in foreign lands. In developing countries, credit or debit cards may or may not work, traveller's cheques may or may not be honored, so determine before you go what you need in the form of currency. Contact banks and guidebooks for information.
- Secure a receipt book from Financial Services to take with you. In developing countries especially, gasoline, food, lodging are provided with no receipt. Leaders need to know that to be reimbursed without a receipt from the provider, they need their own receipt book and a witness to sign to verify the amount of the transaction.
- Check on legal issues:
 - Legality of Canadian prescription drugs in county visited (a formal letter from a Dr. may be required for prescription drugs and some prescription drugs may be banned abroad)
 - Duty and exemptions for items purchased abroad (including legality of items i.e. CITES compliant)

3 months prior to departure

- Confirm your lodging requirements [see FRO's web info on Lodging](#) or email the [Field Research Office](#) for information on available lodging for researchers.
- Check for First Aid Kits required and order if you don't have enough. [See FRO's web page on First Aid Kit Requirements.](#)
- Request [Daily Field Safety Log Books](#) to supplement your Field Activities Plan (for daily tailgate meetings).
- Ensure the trip leader understands the U of A incident/injury reporting requirements. See [EHS Incident/Injury Portal](#) for procedures and forms. Take paper copies of reporting forms with you.

2 months prior to departure

- Verify on availability and source for rental or purchase of any communication device to be taken on trip (e.g., cell phones, 3-watt bag phones, satellite phones). Include frequencies to be used for radio contact. If you need to use a particular radio frequency to communicate, ensure you leave enough time to get properly set up radios. Ensure all paperwork is submitted (e.g. setting up a cell phone through AICT or federal licensing for radios).
- Get [Emergency Information Forms](#) in order:
 - Gather copies of Emergency Information Forms to take out into the field with you and review for disclosed health issues.
 - Speak with individuals with any disclosed health issues and plan for precautions if necessary (including possible restrictions on activities in field).
 - Ensure proper filing of original Emergency Information Forms (with Faculty/Department – FOIPP Officer if have one)
- Advise First Aid Attendant of any pertinent health problems of participants and ensure additional precautions made to accommodate for these.
- As part of the Field Activities Plan, ensure that an Emergency Response Plan is in place including
 - emergency contact numbers for University administration, all participants on trip
 - nearest hospital or nearest medical aid info
 - check-in system as appropriate – the frequency and necessity to check in will depend on the group size and where they are going
 - a plan in place for contacting emergency services
 - evacuation route in case main route is blocked by hazard e.g. fire
- Finalize package of participant info including (EIF, Volunteer Registration form, informed consents for UofA students and non-UofA participants, list of training and equipment provided, etc.) See [FRO's Planning section for waivers](#).
- Register in [UofA Protective Services Online Travel Registration Program "UGO"](#)
- Check out the [University WCB unit](#) within Human Resources.

1 month prior to departure

- Review supply list.
- Plan and draft detailed field/project schedule.
- Ensure all equipment is operable and if not, make arrangements to have repaired, if necessary.

3 weeks prior to departure

- Review FAP to ensure it is complete and revise if necessary and hand out to all participants
- Get waivers signed and go over FAP in detail with participants.
- Plan for research team safety meeting to be held at site and again go over FAP if changes have occurred.
- Gather and retain (dept. and in-field) copies of proof of insurance; passport photo page, copies of any other pertinent travel documents.

2 weeks prior to departure

- Finalize your trip description and itinerary. A detailed itinerary including flights or other transport information with contact information for scheduled locations must be on file with the Dept or Faculty (and Protective Services if you registered with them).
- Make sure passports and visas are in place.
 - Each traveler should have *at least* 1 photocopy of the picture page of his/her passport and any visas separate from the passport and have their passport number memorized (or easily accessed)
 - The tour leader should have copies of all participants visas and passport
 - A photocopy of each participant's (including staff) photo page of the passport and any other travel documents should be on file with the Dept or Faculty
- Insurance
 - All participants should keep an extra copy of their insurance policy with them separate from the original.
 - Proof of insurance must be filed for each traveler with the Dept or Faculty.
- Vaccination/Immunization
 - Proof of pertinent vaccination/immunization for each traveler must be filed with the Dept or Faculty and one copy to be taken with you to the field.

1 week prior to departure

- Make sure FAP and ERP is filed with department, is saved in Google Drive and shared with the appropriate department individuals and copies are in hand to be taken to the field.
- Make sure you have copies of the Daily Field Safety Log Book to take with you to the field.
- Call and confirm with locals, as necessary, your attendance at site, number of personnel involved in project, and expected research start and end dates.
- Ensure all permits/permissions/access to lands are in place.
- Finalize your trip description and itinerary. This must be on file with the Dept or Faculty.
- Make sure your list of equipment is updated and send a copy to the Office of Insurance & Risk Management to ensure that they know the equipment that will be out in the field in case of an incident.
- Have plan in place in case a participant wants to leave the research project early.
- Make sure you have printed off a [Emergency Contact Card](#) so that you have contact information to the Canadian Consulate in case of an emergency.

During research

- Stay in contact with the faculty/department.

Post research

- Complete injury/ incident reports (include near misses), if necessary. Note injuries/incidents must be reported to the Office of Environmental Health and Safety within 24 hours of incident. See [EHS Injury Portal](#).

- Monitor your health for 21 days post-return and if you have any of the following symptoms you should consult with your health care provider:
 - High fever (greater than 38.9°C / 102°F) that lasts more than 2 days. Fever may be accompanied by chills, headaches, stiff neck, abdominal pain, muscle and/or joint pain, skin rash, yellow skin or eyes and /or bloody diarrhea.
 - Nausea, vomiting and/or diarrhea that lasts more than one week.
 - Persistent cough and shortness of breath.
 - Swollen glands in any area of the body
 - Skin lesions that are enlarged, are painful or ulcerate
 - Or any symptoms that are unusual for you.
- If you received an animal bite, you should consult your health care provider even if you received first aid treatment in the field.
- Advise others within your research group to monitor their health and to tell you if they develop health conditions that may be related to the trip.
- File expense claims as soon as possible.
- Debrief:
 - Did any first aid treatments or evacuations take place during the field research project? Reflect on what went wrong, debrief and determine what could have been done better-revise FAP to include new precautions, if any.
 - Did anyone leave before the end of the research project? If yes, details of this should be written up and submitted to the Faculty and the Office of Insurance and Risk Assessment.
 - Was any equipment lost or damaged on the trip? If so, make list of lost equipment and action taken.
 - Report debrief outcomes to [FRO](#) so that others can benefit from your experiences.
- Equipment check-in and return (inspection, repairs done that are needed, cleaned, etc.)
- Archive all documents for access next year to make planning of subsequent field research easier.
- Provide input to [Field Research Office](#) for improvement to this planning tool, FAP, Hazard Assessment Tool and website.