



Office of Research Protections, Research Security & Trade Compliance

The Academic Visitor Process

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October 10, 2025



Webinar Agenda

- Visitor Definitions
- Academic Visitor Website and Eligibility
- Visitor Process Steps
- Summary of the July 14th “4 SVC” Memo
- Research Security and Other Federal Pressures
- UPMC Space, Activities, and Visitors
- UPMC Shadowing and Observerships

Visitor & Academic Visitor Definitions

- A **Visitor** is any individual without a formal appointment, enrollment, or employment by the University.
- An **Academic Visitor** is any individual hosted on campus for an educational, scholarly, or research purpose, and has no appointment, student registration, or employment at the University.

Academic Visitors can include graduate students, postdoctoral associates and fellows, scientists, researchers, scholars, and other individuals from industry, educational, government, and other institutions. They can be self-supported or sponsored by a third-party when they visit.

Undergraduate Visitors

- Undergraduate Visitors are students enrolled in undergraduate programs at institutions other than the University of Pittsburgh. The **Office of the Provost Guidelines for Undergraduate Students Participating in Research** governs these types of visits.
- Undergraduate students from external institutions may be hosted at Pitt under one of the following mechanisms:
 - Temporary Paid Employee (All Temps Mechanism)
 - Research Intern
 - Observer
 - Course-Registered Student

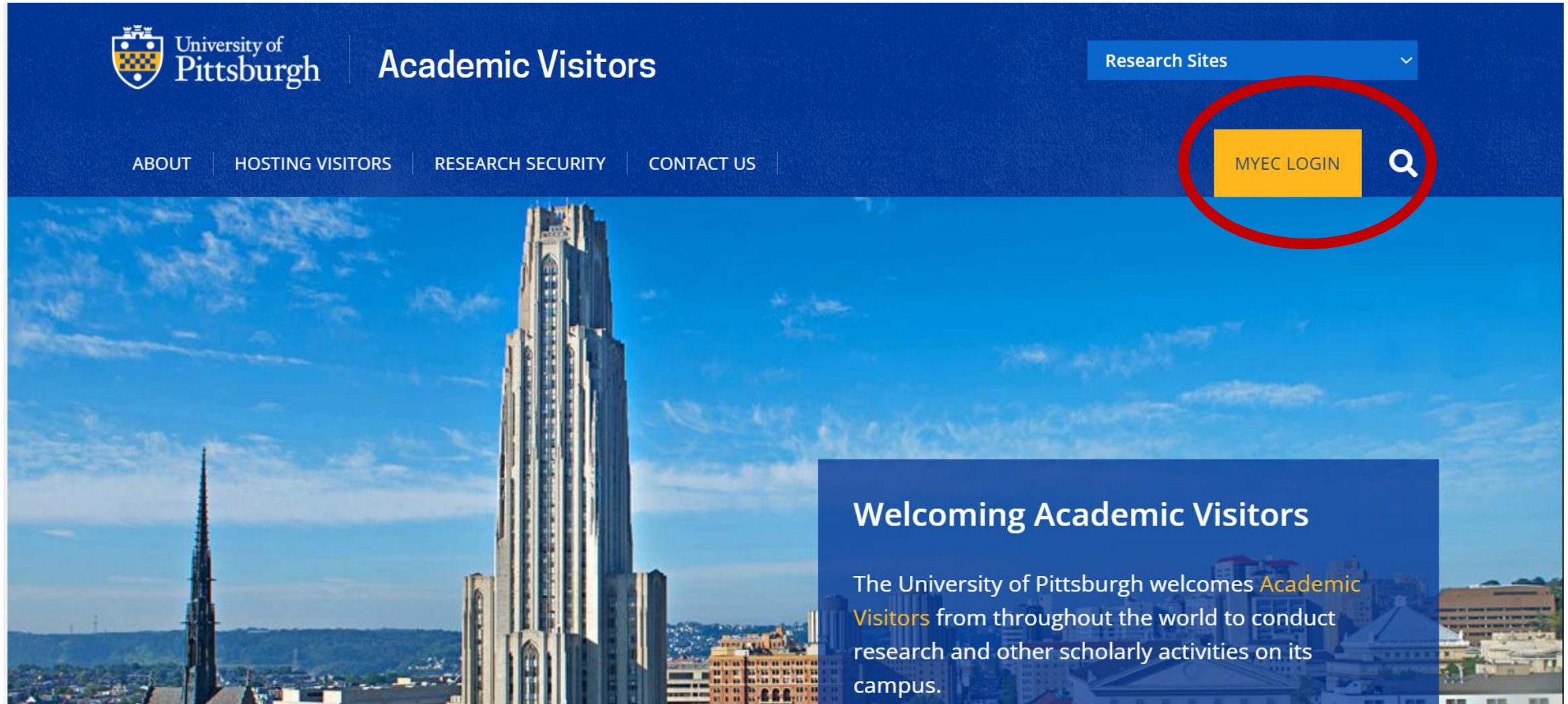
High School Visitors

- High school visitors are those who are enrolled in a high school or similar program.
- High school students may be hosted on campus as part of a formal University program such as the ones listed on the Office of Science Education Outreach, How Science Works **website**.
- Any University representative who will directly interact with high school students as part of a formal program and visit must complete required child protection clearances mandated under Pennsylvania law and administered through the **University's Office of Human Resources**.

Delegations

- A **Delegation** is any group requesting a visit to the University of Pittsburgh as an official representative of a foreign academic, private, or governmental institution. It may consist of a group of students, staff members, faculty members, government representatives, association members OR high-ranking individuals with the capacity to officially represent another institution or group.
- PittGlobal's Global Partnerships & Services (GP&S) team is positioned to facilitate these visits including all communications with the Office of Chancellor, Provost, and Vice Chancellor for Global Affairs.
- More information can be found on their **website** or by contacting them at GlobalPartnerships@pitt.edu.

Website: Visitor.Pitt.Edu



Academic Visitor Eligibility

ELIGIBLE

- External organizationally supported individuals
- External self-supported individuals
- External graduate students
- CMU undergraduate students

NOT ELIGIBLE

- Current Pitt faculty and staff
- Pitt enrolled students
- External undergraduate (Non-CMU) or high school students
- External individuals covered under other contract types with Pitt that include on-campus visits

Academic Visitor Procedures

University of Pittsburgh | Academic Visitors

ABOUT | HOSTING VISITORS | RESEARCH SECURITY | CONTACT US

Visitor Process Overview

Step 1: Determine Visitor Category

Step 2: Visitor Screening & Export Controls Review

Step 3: Centralized Invitation Review & Agreement Processing

Step 4: Visitor Onboarding Procedures

Step 5: Visitor Departure & Close-Out Procedures

Administrative Guidance & Training

Frequently Asked Questions

Welcome

The University of Pittsburgh welcomes visitors from research and industry



Step 1: Determine Visitor Category

The Visitor agreement procedures depend on the purpose of the visit, as described in detail under the **Additional Information by Visitor Category** section below. Academic Visitors will fall into one of three categories:

Category 1	Short-term, non-laboratory visits lasting less than 14 days
Category 2	Long-term, non-laboratory visits lasting more than 14 days
Category 3	Visits of any length that involve laboratory or clinically based research

Please consult the Academic Visitor Eligibility section on the [Visitor Process](#)

HOSTING VISITORS

[Visitor Process Overview](#)[Step 1: Determine Visitor Category](#)[Step 2: Visitor Screening & Export Controls Review](#)[Step 3: Centralized Invitation Review & Agreement Processing](#)[Step 4: Visitor Onboarding Procedures](#)[Step 5: Visitor Departure & Close-Out Procedures](#)[Administrative Guidance & Training](#)

Steps 2 and 3

- The University host completes a visit request through MyEC. ORSTC screens each visitor case for export controls, research security, and completeness of the record.
- An automatic restricted party screening is done on the visitor as well as any sponsors.
- An evaluation is done on all disclosed commodities, technologies and activities for export controls licensing.
- There is additional scrutiny placed on the review of each Statement of Activities to ensure compliance with U.S. labor laws (FLSA).
- Once approved, ORSTC will source the agreement to the visitor and manages the signature process.

Step 4 Required and Conditional Actions

Required Administrative Actions for Category 2 and 3 Visitors

- ✓ Appointment Form
- ✓ Sponsored Email Account
- ✓ Title IX Training
- ✓ Information Security Training
- ✓ University ID Card
- ✓ Health Insurance Requirements

Conditional Administrative Actions for Category 2 and 3 Visitors

- ✓ Research-Specific and Other Training
- ✓ Conflict of Interest Module Completion
- ✓ Clearance for Interacting with Minors
- ✓ University Animal-Facility Access and Animal-Use Training
- ✓ Payments to Academic Visitors
- ✓ Visa Documents

Step 4 Checklist Example

Required Administrative Actions for Category 2 and 3 Visitors

- ✓ Appointment Form
- ✓ Sponsored Email Account
- ✓ Title IX Training
- ✓ Information Security Training
- ✓ University ID Card
- ✓ Health Insurance Requirements



Academic Visitor Program

Step 4 Checklist: Visitor Onboarding Procedures for Category 2 and 3 Academic Visitors

Required Administrative Actions	
Links to the relevant section on the Academic Visitor website are included in the first column, under Action, and where appropriate, a link to the University office that manages the process is included under Responsible Office(s).	
Action	Responsible Office(s)
☐ Appointment Form	Office of Trade Compliance/Dean's Office/Host Department
☐ Sponsored Email Account	Host Department/ Pitt IT
☐ Title IX Training	Host Department/ Office for Equity, Diversion, and Inclusion
☐ Information Security Training	Host Department/ Pitt IT
☐ University ID Card	Host Department/ Panther Central Host Department/ Power of Pitt



Step 5 Visitor Departure and Close Out

Required Close-Out Procedures for Category 2 and 3 Visitors

- ✓ **Appointment Termination**
- ✓ **Deactivate Email Account and Computer Access**
- ✓ **Return University Property**
- ✓ **Terminate University ID Card and Other Access Privileges**
- ✓ **Instructions on Future Exchanges**
- ✓ **Exit Interview**

July 14th SVC Memo Summary

- The memo reinforced that the visitor process is critical for ensuring:
 - Ownership and protection of intellectual property
 - Research security protocols upheld; identification of restricted parties
 - Academic visitors possess adequate health insurance for the visit (they are not covered under the University's workman's comp insurance)
 - Purpose and scope must be evaluated for U.S. labor law compliance
 - Visit duration must correspond with the scholarly objective
 - Any compensation must NOT be used as a substitute for salary

Guidelines Linked in the Memo

- Statements of Activity and Learning Objectives will be scrutinized to ensure they are not substitutes for University staff activities.
- University hosts must substantiate the duration of the visit explicitly demonstrating how the timeframe aligns with learning objectives.
- Visits may not exceed two years in total duration.
- Extension requests beyond two years may be requested with strong justification.
- U.S. labor laws (The Fair Labor Standards Act) and the recent unionization of groups on campus have led to greater awareness on this topic.

Academic Visitor Payments

- Category 1 visitors may receive honorariums of \$5,000 or less to cover expenses for short visits.
- Category 2 & 3 visitors: no honorarium or other payment is currently permitted with the exception of living allowance awards for graduate students enrolled in degree granting programs at other schools.
- This new restriction is due to IRS tax implications and to ensure there are clear parameters between employees and non-employees.
- Exceptions may be requested through ORSTC with endorsement from the host's chair and dean. All requests will go to the Vice Chancellor for Research Protections and Senior Vice Chancellor for Research for a final determination.

Research Security Pressures

- Lawmakers have continued a focus on universities through new laws and guidance (CHIPS Act, NSPM-33, NDAA Provisions).
- The House Select Committee on the CCP has released multiple reports concluding that certain relationships and affiliations with Chinese entities are a threat to U.S. national security.
- Federal funding agencies require visiting scholars and faculty who participate on federally sponsored projects to be disclosed on a PI's other support.
- The CHIPS Act requires federal agencies to conduct risk reviews on applications chosen for funding which has led to required risk mitigation plans to manage identified high risk elements including visitors from foreign countries of concern (China, Russia, Iran, North Korea) or anything related to a confirmed restricted party.
- Please visit the [ORSTC website](#) for more information.

Pitt, UPMC and Academic Visitors

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School of Medicine
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UPMC Shadowing

- UPMC has their own requirements:
 - Infection screening, TB clearance and flu vaccination
 - Education Modules
 - Waivers and consents
 - Background checks for CHP experiences
 - Health Insurance
- Working in a University lab and/or having a UPMC badge does not mean these requirements have been fulfilled.

UPMC Shadowing: Pitt Med students

- Students enrolled at the University of Pittsburgh School of Medicine:
 - Do not need any credentialing or paperwork.
 - By nature of enrollment are cleared to shadow.
 - Can be scheduled directly with the department for observational experiences even in first year.
 - No need to contact anyone for permission
- Medical student email address:
 - @medschool.pitt.edu

UPMC Shadowing

- School of Medicine:
 - Concerns about crowding in the clinical space
 - Prioritization of our Medical students before accepting shadowers
- Medical School Admissions: Culture shift away from expecting shadowing
 - Shadowing is hard to find
 - Passive
 - Lack of equity: Data shows applicants from low income are at disadvantage
 - Should move away from individually arranged shadowing

Office of Medical Education Shadowing Program

- Created a single, equitable shadowing program that all College/University students can apply for.
- 45+ departments offer us spots each month to place students into
- Prefer that you refer students to our program rather than trying to individually host them outside our program. (Exceptions can be made).

shadowing@medschool.pitt.edu

OMED shadowing program: How does it work?

- Students submit all the documents, TB, flu, health insurance, and education module requirements.
- Students successfully submitting correctly are accepted for a single calendar month. Can participate once a year.
- Students choose from a menu of 45+ options and submit 4 specialty choices.
- Scheduling emails sent to student and department 2 weeks before shadowing month begins. Department finds a physician host for the student and schedules the session.
- Most offer a single 4-hour shadowing experience but ok to offer more.

OMED shadowing program: Who doesn't qualify?

High School students:

- Prefer these students be referred to main UPMC shadowing site for placement at non-core site. (Core sites include Presby, Shadyside, Mercy, Magee, CHP, WPIC). High School students can shadow physicians at Community site through volunteer office of that hospital. (link on main UPMC shadowing webpage.)

- Minors cannot shadow in an Operating or sterile procedure room.

OMED shadowing program: Who doesn't qualify?

Visiting Medical Students:

Must apply for official elective through VSLO in final year of training. Independently arranged shadowing for recruitment can occur with permission and \$50 fee to student. Send inquiry to:

Msnamed1@pitt.edu

Note: Higher level of credentialing. Visiting medical students need to purchase their own malpractice insurance even for what would be an observational experience. \$\$

School of Medicine wants to know- How do you benefit? Why student does not pursue this experience at home institution?

OMED Shadowing Program: Who doesn't qualify?

- Medical Graduates (Domestic and International) including resident trainees from other programs and visiting physicians from other healthcare systems.
- UPMC working to centralize a process but not in place yet.
- UPMC Enhanced Observership Program (EOP) department of Internal medicine
 - International Medical Graduate inquiries can be referred there
 - Your department can create your own EOP by following their model

OMED Shadowing Program: Who doesn't qualify?

- Post Doctoral researchers in University labs
 - Clinical exclusion clause
 - Contract: 100% research position, 0% clinical

What about non-student observers?

- UPMC Employees
 - Still need to be cleared to shadow if not working during the shadow experience
 - Shadowing is separate from their role as an employee
 - Paperwork still needed
 - Education modules different from employee modules are required
 - These employees can be referred to the shadowing service account for credentialing- must be initiated by the hosting physician/department. We won't place them into shadowing spots but we will make sure they are credentialed

shadowing@medschool.pitt.edu

What about non-student observers?

- Recent graduates, career changers, etc
 - We won't place these students into shadowing positions
 - We will make sure they are credentialed-
 - Physician or Department must initiate the request- Students cannot do this on their own.

shadowing@medschool.pitt.edu

What about shadowing non-physicians?

- UPMC has a central website where observers can request shadowing of various health care professionals.
 - Students requesting non-physician shadowing opportunities should be referred there.

UPMC Shadowing

- <https://www.upmc.com/healthcare-professionals/education/shadowing-touring>

Office of Research Protections, Research Security and Trade Compliance

THANK YOU!

[Researchsecurity.pitt.edu](https://researchsecurity.pitt.edu)